# VERIFICATION WORKSHEET INDEPENDENT STUDENT

# TRACKING V5

*Award Year 2026-2027*

Your 2026-2027 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your spouse (if married) reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

**A. Independent Student's Information**

| Student's Last Name | Student's First Name | MI | Student's SSN or ID Number |
|---|---|---|---|

| Student's Street Address (include apt. no.) | Student's Date of Birth |
|---|---|

| City | State | Zip | Student's Email Address |
|---|---|---|---|

| Student's Phone Number | Student's Alternate or Cell Phone Number |
|---|---|

**B. Independent Student's Family Information**

Number of Household Members: List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2026, through June 30, 2027, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2027.

Number in College: Please include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2026, and June 30, 2027, include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

| Full Name | Age | Relationship | College | Will be Enrolled at Least Half Time |
|---|---|---|---|---|
| *Missy Jones (example)* | *28* | *Spouse* | *Central University* | *Yes* |
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**Note:** We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.



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*Rev. 4/15/2026*

**C. Independent Student's Income Information to Be Verified**

**1. Tax Return Filers**

**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2024.

**Instructions:** Complete this section if the student and spouse filed or will file a 2024 IRS income tax return(s). The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of *FAFSA on the Web* at FAFSA.gov. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

**Check the box that applies:**

☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2024 IRS income tax return information into the student's FAFSA.

☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2023 IRS income tax return information into the student's FAFSA.

☐ The student and/or spouse is unable or chooses not to use the IRS DRT in *FAFSA* on the Web, and instead will provide the school with a **2024 IRS Tax Return Transcript(s)**.

A **2023 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail - Go to www.IRS.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

- Get Transcript ONLINE - Go to www.IRS.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.

- Telephone Request – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the online request.

- Paper Request Form – Use the links to download IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the online request.

When requesting a transcript, use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2024 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2024 IRS income tax return).

In most cases, for electronic tax return filers, 2024 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2024 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2024 paper IRS income tax returns, the 2024 IRS income tax information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2024 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the student and spouse filed separate 2024 IRS income tax returns, the IRS DRT cannot be used and the **2024 IRS Tax Return Transcript(s)** must be provided for each.

☐ Check here if a **2024 IRS Tax Return Transcript(s)** is provided.

☐ Check here if a **2024 IRS Tax Return Transcript(s)** will be provided later.


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**2. Nontax Filers**

The instructions and certifications below apply to the student and spouse, if the student is married.
Complete this section if the student and spouse will not file and are not required to file a 2024 income tax return with the IRS.

**Check the box that applies:**

☐ The student and/or spouse were not employed and had no income earned from work in 2024.

☐ The student and/or spouse was employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form is provided. [Provide copies of all 2024 IRS W-2 forms issued to the student and/or spouse by their employers]. List every employer even if they did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

| Employer's Name | 2024 Amount Earned | IRS W-2 Attached? |
|---|---|---|
| *ABC Shipping (example)* | *$1,280* | *Yes* |
| | | |
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You must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2025 that indicates a 2024 IRS income tax return was not filed with the IRS or other relevant tax authority.

Documentation includes a verification of nonfiling letter from the IRS. This form may be obtained by completing an IRS Form 4506-T and checking box 7. An IRS form 4506-T may be downloaded here.

**Check the box that applies:**

☐ Check here is a confirmation of nonfiling is provided.

☐ Check here is a confirmation of nonfiling will be provided later.

**D. High School Completion Status**

Provide one of the following documents that will indicate the student's high school completion status when the student begins college in 2026-2027:

**Check the box of the document you will attach to this worksheet:**

☐ A copy of the student's high school diploma.

☐ A copy of the student's final official high school transcript that shows the date when the diploma was awarded.

☐ A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).

☐ For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.

☐ An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.

☐ For a homeschooled student in a state where state law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.

☐ For a homeschooled student from a state where state law does not require the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a


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secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office. In some cases, your school's financial aid office may accept a copy of a Form DD 214 as proof of high school completion.

**E. Identity and Statement of Educational Purpose**

**Section E is <u>ONLY</u> to be completed in person at the Institution or in front of a Notary.**

**Identity and Statement of Education Purpose**
**(Signed in person at the Institution)**

The student must appear in person at _____
(Name of Postsecondary Education Institution)

to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed and the name of the official at the institution authorized to receive and review the student's ID.

**In addition, the student must sign, in the presence of the institutional official, the below Statement of Education Purpose.**

**Identity and Statement of Educational Purpose**
**(Signed in the presence of a Notary only if unable to sign in person at the institution)**

If the student is unable to appear in person at _____
(Name of Postsecondary Education Institution)

to verify his or her identity, the student must provide to the institution:

(a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
(b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**In addition, the student must sign, in the presence of a notary, the below Statement of Education Purpose.**

**The following Statement of Educational Purpose is to be completed <u>only</u> in the presence of designated school official or notary.**

**Statement of Educational Purpose**

I certify that I _____ am the individual signing this Statement of Educational Purpose
(Print Student's Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending _____ for 2026-2027.
(Name of Postsecondary Educational Institution)

_____ _____ _____
(Student's Signature) (Date) (Student's ID Number)

_____ _____
(Financial Aid Administrator's Signature) Date

**Notary's Certificate of Knowledge**

State of _____ City/County of _____ On _____

before me, _____ personally appeared, _____
(Notary's Name) (Printed name of signer)

, and proved to me on basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

To be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal** _____ _____


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(Notary Signature) (Date Commission Expires)

**(Seal)**

***Return this original form with your proof of Identity to your school's financial aid office.***

**F. Certification and Signatures**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

**The student must sign and date this form.**

Student's Signature Date

Spouse's Signature (optional) Date

***Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school.***

***You should make a copy of this worksheet for your records.***



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