

## 2024-2025 V5 Independent Verification Worksheet

**What is Verification?** – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation to verify the information reported on your FAFSA. We may correct your FAFSA based on your provided documentation if there are discrepancies. During the verification process, it may be determined that additional documents are needed.

As part of federal student aid eligibility, students and spouses (as appropriate) will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. **In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student’s FAFSA using the income and tax information directly from the IRS.**

**If 2022 income tax information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

A 2022 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record.” Click “Get Transcript by Mail.” Make sure to request the “Return Transcript” and NOT the “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](http://www.irs.gov), click “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “Return Transcript” and NOT the “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 is displayed online upon successful completion of the IRS’s two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- **Paper Request Form** – 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 paper request form.

### A. Student Information

| Student Name | Date of Birth | IU Student ID Number |
|--------------|---------------|----------------------|
|              |               |                      |

| Address |
|---------|
|         |

| City | State | Zip | Phone (include area code) |
|------|-------|-----|---------------------------|
|      |       |     |                           |

**B. Family Size**

List the people in your household, including:

- The student.
- The student’s spouse, if applicable.
- The student’s dependent children if the following are true:
  - They live with the student (or live apart because of college enrollment),
  - They receive more than half of their support from the student, and
  - They will continue to receive more than half of their support from the student from July 1, 2024, through June 30, 2025.
- Other persons if the following are true:
  - They live with the student,
  - They receive more than half of their support from the student, and
  - They will continue to receive more than half of their support from the student from July 1, 2024, through June 30, 2025.

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the time of completing the 2024-2025 FAFSA. As a result, the student should not include any unborn children in the family size.

Provide a separate page with the student’s name and ID number at the top if additional space is needed.

| Full Legal Name | Age | Relationship |
|-----------------|-----|--------------|
|                 |     | Self         |
|                 |     |              |
|                 |     |              |
|                 |     |              |
|                 |     |              |
|                 |     |              |

**C. Student Tax Information**

1. Did you (the student) file a 2022 Federal Tax Return?
  - YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript OR a signed copy of your 2022 Federal Tax Return along with ALL applicable schedules. *(Skip to section D.)*
  - NO,** I did not, will not, and was not required to file a 2022 income tax return with the IRS. *(Must answer question 2 and sign.)*
  
2. **TAX RETURN NON-FILERS ONLY** – Complete this section if you (the student) will not file and are not required to file a 2022 income tax return with the IRS. Check the box that applies:
  - I was not employed and had no income earned from work in 2022.
  - I was employed in 2022. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)

| Income earned from work: Use the W-2 or other earnings statements <i>(Non-tax filers only)</i> |                    |               |
|--|--------------------|---------------|
| Employer(s) Name   | 2022 Amount Earned | W-2 Attached? |
|  | \$                 |               |
|  | \$                 |               |

Signature of Student (only if tax return non-filer): \_\_\_\_\_ Date: \_\_\_\_\_

**D. Spouse Tax Information (if applicable)**

Spouse Name: \_\_\_\_\_

- 1. Did the student’s spouse file a 2022 Federal Tax Return?
  - YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript OR a signed copy of your 2022 Federal Tax Return along with ALL applicable schedules. *(Skip to section E.)*
  - NO,** I did not, will not, and was not required to file a 2022 income tax return with the IRS. *(Must answer question 2 and sign.)*

- 2. **TAX RETURN NON-FILERS ONLY** – Complete this section if the spouse will not file and is not required to file a 2022 income tax return with the IRS. Check the box that applies:
  - I (the spouse) was not employed and had no income earned from work in 2022.
  - I (the spouse) was employed in 2022. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)

| Income earned from work: Use the W-2 or other earnings statements <i>(non-tax filers only)</i> |                    |               |
|--|--------------------|---------------|
| Employer(s) Name   | 2022 Amount Earned | W-2 Attached? |
|  | \$                 |               |
|  | \$                 |               |

Signature of Spouse (only if tax return non-filer): \_\_\_\_\_ Date: \_\_\_\_\_

**E. Certifying Signature**

By signing below, I (the student) certify that all the information reported is complete and correct. I (the student) also understand that if any of the information reported on this form is inconsistent with what has been reported on the FAFSA, additional documentation may be required. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

**TO RETURN THIS FORM:**

**Mail to:** Immaculata University  
Office of Financial Aid  
1145 West King Road  
Immaculata, PA 19345

**In Person:** Office of Financial Aid  
2<sup>nd</sup> Floor  
Lillian P. Lettiere Center

