

2025-2026 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 2023 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 2023 income information that was transferred into the student’s FAFSA using the income and tax information directly from the IRS.**

If 2023 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 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A 2023 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by Mail** – Go to 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, 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, 2025, through June 30, 2026.
- 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, 2025, through June 30, 2026.

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 2025-2026 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 2023 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 2023 IRS Tax Return Transcript OR a signed copy of your 2023 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 2023 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 2023 income tax return with the IRS. Check the box that applies:
 - I was not employed and had no income earned from work in 2023.
 - I was employed in 2023. 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	2023 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 2023 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 2023 IRS Tax Return Transcript OR a signed copy of your 2023 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 2023 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 2023 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 2023.
 - I (the spouse) was employed in 2023. 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	2023 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
2nd Floor
Lillian P. Lettiere Center

F. Identity/Statement of Educational Purpose

Instructions: Read this worksheet thoroughly and answer all questions. The student must appear in person at Immaculata University (Office of Financial Aid) to verify their 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 annotated by the institution with the date it was received and reviewed, and the name of the official authorized to receive and review the student’s ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

If the student is unable to appear in person at Immaculata University to verify their identity, the student must provide the original signed and notarized Statement of Educational Purpose along with a copy of the unexpired valid government-issued photo ID that is acknowledged in the notary statement below. The completed worksheet must be mailed to the office of Student Financial Services.

Student Information

Student Name	Date of Birth	IU Student ID Number	Phone (include area code)

Address	City	State	Zip

Statement of Educational Purpose

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

Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Immaculata University for 2025-2026.

 Student’s Signature Date Student’s ID Number (Required)

Notary Certificate of Acknowledgment (If unable to appear in person)

(Notary signature/seal required if the student is not providing information in person. Notaries can often be found at local banks, credit unions, insurance agencies, or shipping stores. Certification may vary by state)

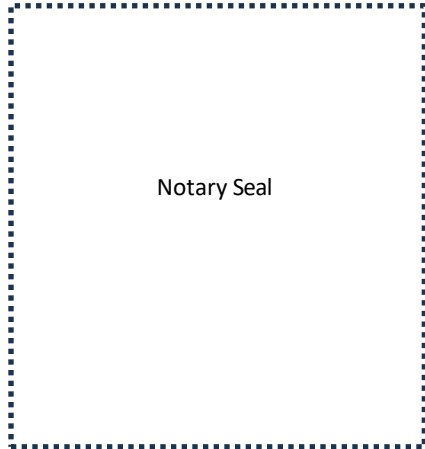
State of: _____ City/County of: _____

On _____, before me, _____
(Date) (Notary’s Name)

personally appeared, _____, and proved to me
(Printed Name of Signer)
 because of satisfactory evidence of identification _____
(Type of unexpired government-issued photo ID provided)
 to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(Notary Signature) My commission expires on (Date)



Office Use Only

Official’s Name: _____ Official’s Signature: _____ Date: _____