2025-2026 Verification (V5) Worksheet
Independent Student

Your 2025-2026 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal regulations indicate before awarding Federal Student Aid, we must ask you to confirm the information you and your spouse, if applicable, reported on your FAFSA. To verify that you provided correct information, we 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 and we may request additional information.

INSTRUCTIONS: You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to Student Financial Services. We may request additional information. **You must complete sections A, B, C, F *and* either D *or* E depending on your situation.**

A. STUDENT INFORMATION

Student's Full Name:_____ Student ID:_____

Student's Phone Number:_____ Student SSN:_____

B. FAMILY SIZE

Family Size - Includes the following:

- The student.
- The student's spouse, if applicable.
- The student's dependent children if **all** 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 their support from the student during the award year.
- 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 their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" mirror the requirement that family size align with those 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.

Full Name (ALL who meet the above criteria)	**Age**	**Relationship**
		(Self)

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

C. VERIFICATION OF 2023 INCOME INFORMATION FOR STUDENT TAX FILERS

IMPORTANT NOTE: The instructions below apply to the student and spouse (if the student is married). The student must contact Student Financial Services if the student and spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

STUDENT TAX FILER INSTRUCTIONS: Complete this section if the student and spouse, if applicable, filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, the 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 income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student and spouse 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." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS Help Site.
- Automated Telephone Request – 1-800-908-9946. *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.*

STUDENT NON-TAX FILER INSTRUCTIONS – 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* **is not required to file** a 2023 income tax return with the IRS.

By completing this document, I certify that I have not filed and am not required to file a 2023 income tax return, and I have listed all income earned from work, other income, and resources for the 2023 tax year.

Check the box that applies if you did not file or will not file a 2023 Tax Return:

☐ My spouse (if applicable) and I were not employed and had no income earned from work in 2023.

☐ My spouse and/or I were employed in 2023 and has listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. (Provide copies of all 2023 IRS W-2 forms issued to the you and your spouse by your employers). List every employer even if the employer did not issue an IRS W-2 form. (NOTE: Verification cannot be completed until all W-2's are received.)

Employer's Name	2023 Annual Amount Earned	IRS W-2 or an Equivalent Document Attached?
(EXAMPLE) Suzy's Auto Body Shop	*$2,000.00*	☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No

☐ My spouse and/or I had other income and resources that supported us for the 2023 tax year. (List each source of income below. If more space is needed, provide a separate page with your name an ID number.)

Source of Income	2023 Annual Amount
(Example) Rental property	*$4,500.00*
Total Amount of Income	**$**

PLEASE NOTE THE FOLLOWING INFORMATION, IF APPLICABLE, FOR THE STUDENT AND/OR SPOUSE, IF APPLICABLE:

- **Individuals Granted a Filing Extension by the IRS**
  An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023, must provide:
  - A signed statement listing the sources of any 2023 income and the amount of income from each source;
  - A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
  - A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2023; **and**
  - If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2023.
- **Individuals Who Filed an Amended IRS Income Tax Return**
  An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
  - Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
  - A **2023 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **or**
  - A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.
- **Individuals Who Were Victims of IRS Tax-Related Identity Theft**
  An individual who was the victim of IRS tax-related identity theft must provide:
  - A copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; **and**
  - An IRS 4674C letter (a letter form the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.
- **Individuals Who Filed Non-IRS Income Tax Returns**
  - A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

If any of these circumstances apply to the student and/or the parent, please provide the indicated documentation along with this completed verification form. Please contact Student Financial Services with any questions regarding any of this information.

D. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (<u>Section to Be Signed at The Institution</u>)

The student must appear in person at _____ to verify

(Name of Postsecondary Educational Institution)

his or her identity by presenting a 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 with the date it was received and the name of the official at the institution authorized to collect the student's ID.

In addition, the student must sign, in the presence of the institutional official, the following:

STATEMENT OF EDUCATIONAL PURPOSE

I certify that I, _____, am the individual signing this Statement of

(Print Student's Name)

Educational 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 _____ for 2025-2026.

(Name of Postsecondary Educational Institution)

_____	_____	_____
Student's Signature	**Student ID**	**Date**

E. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (Section to Be Signed with Notary)

If the student is unable to appear in person at _____ to

(Name of Postsecondary Educational Institution)

verify his or her identity, the student must provide:

(a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; **and**

(b) The original notarized Statement of Educational Purpose provided below.

STATEMENT OF EDUCATIONAL PURPOSE

I certify that I, _____, am the individual signing this Statement of

(Print Student's Name)

Educational 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 _____ for 2025-2026.

(Name of Postsecondary Educational Institution)

_____	_____	_____
Student's Signature	Student ID	Date

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

on_____, before me, _____,

(Date) ***(Notary's name)***

personally appeared, _____, and provided to me

(Printed name of signer)

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

(seal)

_____

(Notary signature)

My commission expires on _____

(Date)

F. CERTIFICATION AND SIGNATURES

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

_____ _____

Student's Signature - Required *(no typed signature permitted)* Date

_____ _____

Spouse's Signature - Optional *(no typed signature permitted)* Date

INSTRUCTIONS FOR SUBMITTING THIS VERIFICATION DOCUMENT:

***IF completing the Identity and Statement of Educational Purpose at the COLLEGE (section B), please visit our office during normal business hours at:**
Blaney Hall, Room 212

***IF completing the Identity and Statement of Educational Purpose at a NOTARY due to not being able to appear in person at the College (section C), you may submit the ORIGINAL form by mail to:**
Student Financial Services, 100 College Drive, Allentown, PA 18104

NO copies of this form may be accepted (including emails or portal submissions), only originals.

*All documents requested must be submitted for the verification process to be completed.