

2027-2028 Verification Worksheet

Independent Student

Your 2027-2028 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 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	Student's M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

B. Independent Family Size

Family Size - Includes the following:

- 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 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” 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 2027-2028 FAFSA. As a result, the student should not include any unborn children in the family size.

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

[illegible]

Verification of 2025 Income Information for Student Nontax Filers
(If the student filed taxes, please skip to the next page)

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 2025 income tax return with the IRS.

Check the box that applies:

- ☐ The student and spouse were not employed and had no income earned from work in 2025.
- ☐ The student and/or spouse were employed in 2025 and have listed below the names of all employers, the amount earned from each employer in 2025, and whether an IRS W-2 form or an equivalent document is provided. *[Provide copies of all 2025 IRS W-2 forms issued to the student and spouse by their employers.]* List every employer even if the employer 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	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2025
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00
Total Amount of Income Earned From Work		\$

- ☐ My spouse and/or I had other income and resources that supported us for the 2025 tax year. [List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.]

Source of Income	Annual Amount Earned in 2025
<i>(Example) Rental Property</i>	\$4,500.00
Total Amount of Income	\$

Verification of 2025 Income Information for Student Tax Filers

(If student did not file taxes, complete previous page)

Important Note: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student and spouse filed separate IRS income tax returns for 2025 or had a change in marital status after December 31, 2025.

Instructions: Complete this section if the student and spouse filed or will file a 2025 IRS income tax return(s). 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 2025 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 2025 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2025 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a **2025 IRS Tax Return Transcript(s) or a signed copy of the 2025 income tax return and applicable schedules.**

A 2025 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's Name: _____ SSN: _____

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 2025 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 from 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 the institution questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the institution with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2025 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2025 must provide:

- A signed statement listing the sources of any 2025 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 2025;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2025; 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 2025.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2025 must provide a signed copy of the 2025 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes 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 2025 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 2025 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Student's Name: _____ SSN: _____

Certification and Signature

Each person signing below certifies that all of the verification documents submitted with this certification are complete and correct.

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

Print Student's Name

Student's ID Number or SS #

Student's Signature (Required)

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