



U.S. Department of Education

# DEPENDENT 2025-2026 VERIFICATION WORKSHEET FEDERAL STUDENT AID PROGRAM



MOUNT ST. JOSEPH  
UNIVERSITY

## You must complete and sign this worksheet

*Non-Scholarship aid will not be available until the verification process, as outline on this worksheet, is complete. Preliminary Awards are estimates of eligibility. Any delay can cause the loss of eligibility or limited aid sources. Failure to complete verification prior to the last day of enrollment can result in total loss of eligibility.*

## A. Student Information

Check one:     Incoming Freshman or Transfer Student     Continuing Student

\_\_\_\_\_  
Last Name                                      First Name                                      M.I.                                      MSJ Student ID # (required for completion)

\_\_\_\_\_  
Address (include apt. # if applicable)                                      Date of Birth

\_\_\_\_\_  
City                                      State                                      Zip                                      Phone Number (include area code)

## B. Family Information

Family Size - Includes the following:

- The student.
- The student’s parents, even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- The student’s siblings if the following are true:
  - They live with the student’s parents (or live apart because of college enrollment),
  - They receive more than half of their support from the student’s parents, and
  - They will continue to receive more than half their support from the student’s parents during the award year.
- Other persons if the following are true:
  - They live with the student’s parents,
  - They receive more than half of their support from the student’s parents, and
  - They will continue to receive more than half their support from the student’s parents during the award year.

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S tax return at the time of completing the 2025-2026 FAFSA. As a result, the parent 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.

| Full Name | Age | Relationship to Student |
|-----------|-----|-------------------------|
|           |     | <i>Self</i>             |
|           |     |                         |
|           |     |                         |
|           |     |                         |
|           |     |                         |

## C. Student Income Information

### 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, 2023.

**Instructions:** Complete this section if the student and spouse filed or will file a 2023 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 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.

**If 2023 income tax return 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](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 displays online upon successful completion of the IRS's two-step authentication.
- 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.

**2. TAX RETURN NON-FILERS:** Complete this section if student will not file and is not required to file a 2023 income tax return with the IRS.

- Student not employed; no earned income in 2023
- Student employed and completed info. Every employer, even if they didn't issue a W-2, must be listed. W-2s must be provided if issued.

| Employer's Name               | W-2 Issued? | 2023 Income |
|-------------------------------|-------------|-------------|
|                               |             |             |
|                               |             |             |
|                               |             |             |
| Total Amount Earned from work |             | \$          |

Provide a signed and dated statement certifying the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

\_\_\_\_ Initial here if non-filing statement is signed and dated.

\_\_\_\_ Initial here if the non-filing statement will be provided later. (Verification will be considered incomplete until this is provided)

## D. Parent'(s) Income Information

### 1. TAX RETURN FILERS:

**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

**Instructions:** Complete this section if the parents filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, parents 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 parents 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.

**If 2023 income tax return information for the parents was not available or could not be used, the parents 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](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 displays online upon successful completion of the IRS's two-step authentication.
- 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.

2. **TAX RETURN NON-FILERS:** Complete this section if parent(s) will not file and are not required to file a 2023 income tax return with the IRS.

- Parent(s) not employed; no earned income in 2023
- Parent(s) employed and completed info. Every employer, even if they didn't issue a W-2, must be listed. W-2s must be provided if issued.

| Employer's Name               | W-2 Issued? | 2023 Income |
|-------------------------------|-------------|-------------|
|                               |             |             |
|                               |             |             |
|                               |             |             |
| Total Amount Earned from work |             | \$          |

Provide a signed and dated statement certifying the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

\_\_\_\_ Initial here if non-filing statement is signed and dated.

\_\_\_\_ Initial here if the non-filing statement will be provided later. (Verification will be considered incomplete until this is provided)

## E. Certification and Signatures

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

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

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

\*Extension filing will require the completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to Mount St. Joseph University.

**Do not mail this worksheet to the U.S. Department of Education. Mail, fax, or bring to Mount St. Joseph University. Keep a copy for your records.**

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