



U.S. Department  
of Education

# INDEPENDENT

## 2026-2027 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 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 2026-2027 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.

| 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 2024 or had a change in marital status after December 31, 2024.

**Instructions:** Complete this section if the student and spouse filed or will file a 2024 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 2024 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 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

**If 2024 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 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.**

A 2024 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 2024 income tax return with the IRS.

- ☐ Student not employed; no earned income in 2024
- ☐ 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 |             | \$          |

## E. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature (If student is married)

\_\_\_\_\_  
Date

**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.**

**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.

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