

Your 2025-2026 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before processing Federal Student Aid, we must ask you to confirm the information you and your parent(s) reported on your FAFSA. To verify that correct information was provided, 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. **You and at least one parent must complete and sign this worksheet, attach any required documents, and submit this form and required documents to the Financial Aid Office (Mullen Building, Room 203).** We may ask for additional information after this has been submitted. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

This form will be rejected if it is incomplete or illegible...please complete carefully!

STEP 1 – STUDENT INFORMATION – Please print clearly.

Student Name (Last Name, First Name) _____

Ursuline Student ID _____

STEP 2 – STUDENT TAX FILING INFORMATION

Your FAFSA indicates that you have **NOT** used the IRS Direct Data Exchange (DDX) to transfer your 2023 income information.

Please check **one** box below that applies to you (the **student**).

<input type="checkbox"/>	<p>I have used the IRS Direct Data Exchange (DDX) to submit my income information to the FAFSA.</p> <p>If you (the student) use this tool, you will NOT need to submit 2023 IRS Tax Returns.</p> <p><i>I understand that the verification process cannot be completed until this information is received.</i></p> <p>Date IRS Direct Data Exchange (DDX) used _____.</p>																		
<input type="checkbox"/>	<p>I am unable to use the IRS Direct Data Exchange (DDX) on the FAFSA, to transfer my income information.</p> <p><input type="checkbox"/> I have attached a copy of my signed 2023 IRS Tax Returns, including Schedules 1, 2, and 3, if filed, or</p> <p><input type="checkbox"/> I have requested the IRS to send a copy of my 2023 IRS Tax Return Transcript to me and will then forward it to the Financial Aid Office.</p> <p><i>I understand that the verification process cannot be completed until this information is received.</i></p> <p>Date 2023 IRS Tax Return Transcript was requested from IRS _____.</p>																		
<input type="checkbox"/>	<p>I was employed in 2023 but was not required to file a 2023 Federal Tax Return. Please list below the names of all your (the student's) employers and the amount earned from each employer in 2023. List every employer even if the employer did not issue an IRS W-2 or 1099 form. If more space is needed, provide a separate page with your name and student ID number at the top.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 60%;">Employer's Name</th> <th style="width: 15%;">IRS W-2/1099 Provided?</th> <th style="width: 25%;">Annual Amount Earned in 2023</th> </tr> </thead> <tbody> <tr> <td><i>(Example) ABC's Auto Body Shop</i></td> <td style="text-align: center;">Yes</td> <td style="text-align: right;">\$4,500.00</td> </tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr> <td colspan="2" style="text-align: right;">Total Amount of Income Earned from Work</td> <td style="text-align: right;">\$</td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 5px;">You must submit copies of each W-2/1099 form(s)</p>	Employer's Name	IRS W-2/1099 Provided?	Annual Amount Earned in 2023	<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00										Total Amount of Income Earned from Work		\$
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Total Amount of Income Earned from Work		\$																	
<input type="checkbox"/>	<p>I was unemployed and had no income earned from work in 2023.</p>																		

Office of Financial Aid

STEP 3 – PARENT MARITAL STATUS

Marital Status of FAFSA contributor(s)/parent(s).

A legal parent is defined as a biological or adoptive parent.

Based on the above definition of legal parent, the marital status of the legal parent that provides more than half of my support is:

- A. _____ Single (never married) and both legal parents **live together**.
- B. _____ Single (never married) and both legal parents **live apart**.
- C. _____ Married/Remarried to legal parent or stepparent.
- D. _____ Separated/Divorced (legally or no court action) to legal parent and **living together**.
- E. _____ Separated/Divorced (legally or no court action) to legal parent and **living apart**.
- F. _____ Widowed

Who must provide 2023 financial information on my FAFSA?

- ☐ The marital status of my legal parent providing more than half of my support has been indicated as A, C, or D (*as selected above*). I must provide a copy of both legal parents' or legal parent and stepparent's 2023 Federal Income Tax Return or if taxes were not filed copies of all W-2 forms and/or 1099 Forms.
- ☐ The marital status of my legal parent providing more than half of my support has been indicated as B, E, or F (*as selected above*). I must provide a copy of my legal parent's 2023 Federal Income Tax Return or if taxes were not filed copies of all W-2 forms and/or 1099 forms.

When Students and Parents are submitting paper copies of their 2023 Federal 1040 Income Tax Returns, please make sure:

- Both student and at least one legal parent has signed their respective tax form(s)
- Write the student's name at the top of the legal parent's or stepparent's tax form(s)
- Include Schedules 1, 2, and 3, if filed
- If legal parent(s) or legal parent/stepparent filed separately, signed copies of both returns are needed.

If you do not have a copy of your tax returns, you can obtain a copy of your 2023 Federal Tax Return Transcript from the IRS:

- Go to www.irs.gov,
 - Select "Get Your Tax Record,"
 - Then select "Get Transcript Online," or
 - Select "Get Transcript by Mail," or
- Call the IRS at 1-800-908-9946

Be sure to request Tax Return Transcript NOT Tax Account Transcript.

Office of Financial Aid

STEP 4 – PARENT(S) TAX FILING INFORMATION

Your FAFSA indicates that you have **NOT** used the IRS Data Exchange to transfer your 2023 income information.

Please check **one** box below that applies to the **PARENT(S)**

<input type="checkbox"/>	<p>Parent(s) have used the IRS Direct Data Exchange (DDX) to submit income information on the FAFSA. If the parent(s) used this tool, they will NOT need to submit 2023 IRS Tax Returns.</p> <p><i>We understand that the verification process cannot be completed until this information is received.</i></p> <p>Date IRS Direct Data Exchange (DDX) used _____.</p>																		
<input type="checkbox"/>	<p>Parent(s) are unable to use the IRS Direct Data Exchange (DDX) on the FAFSA to transfer their income information.</p> <p><input type="checkbox"/> My parent(s) have attached a copy of their signed 2023 IRS Federal Tax Returns with all schedules, or</p> <p><input type="checkbox"/> My parent(s) have requested a copy of their 2023 IRS Tax Return Transcript from the IRS and will then forward it to the Financial Aid Office.</p> <p><i>We understand that the verification process cannot be completed until this information is received.</i></p> <p>Date 2023 IRS Tax Return Transcript was requested from the IRS _____.</p>																		
<input type="checkbox"/>	<p>Parent(s) were employed in 2023 but were not required to file a 2023 Federal Tax Return. Please list below the names of all the employers and the amount earned from each employer in 2023. List <u>every</u> employer even if the employer did not issue an IRS W-2 or 1099 form. If more space is needed, provide a separate page with the student's name and student ID number at the top.</p> <table border="1"><thead><tr><th>Employer's Name</th><th>IRS W-2/1099 Provided?</th><th>Annual Amount Earned in 2023</th></tr></thead><tbody><tr><td>(Example) ABC's Auto Body Shop</td><td>Yes</td><td>\$4,500.00</td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td colspan="2">Total Amount of Income Earned from Work</td><td>\$</td></tr></tbody></table> <p>You must submit copies of each W-2/1099 <u>AND</u> a Verification of Non-Filing letter from the IRS (Form 4506-T).</p>	Employer's Name	IRS W-2/1099 Provided?	Annual Amount Earned in 2023	(Example) ABC's Auto Body Shop	Yes	\$4,500.00										Total Amount of Income Earned from Work		\$
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<input type="checkbox"/>	<p>Parent(s) were unemployed and had no income earned from work in 2023. Parent(s) must submit a Verification of Non-Filing for 2023 from the IRS. This can be obtained by completing and sending Form 4506-T, Request for Transcript of Tax Return, to the IRS.</p>																		

STEP 5 – CERTIFICATION

By signing this worksheet, I certify all the information reported on this worksheet is complete and correct. I understand that the Financial Aid Office reserves the right to request additional information as needed. Furthermore, I understand that all requested information must be received three (3) weeks prior to the end of the semester for which I wish to receive aid. Failure to do so may result in me (the student) not being eligible to receive financial aid. **WARNING** If you purposefully give false or misleading information, you may be fined, sentenced to jail, or both.

Student Signature

Date

Parent 1 Name (Please Print)

Parent 1 Signature

Date

Parent 2/Stepparent Name (Please Print)

Parent 2/Stepparent Signature (if information is provided)

Date

Office of Financial Aid