

Your 2025-2026 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 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. **You and your spouse (if applicable) must complete and sign this worksheet, attach any required documents, and submit the form and other 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 (unmarried) TAX FILING INFORMATION

Your FAFSA indicates that you have **NOT** or could not use 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 <u>NOT</u> yet but will use the IRS Direct Data Exchange (DDX) on the FAFSA to load and submit my income information on the FAFSA. If you (the student) use this tool, you will NOT need to submit 2023 IRS Tax Return Transcripts. <i>(I understand that the verification process cannot be completed until this information is received.)</i> Date DDX was used _____.</p>																		
<input type="checkbox"/>	<p>I am unable or choose not to use the IRS Data Retrieval Tool on the FAFSA, to transfer my income information.</p> <p><input type="checkbox"/> I have attached a signed copy of my 2023 IRS Tax Return including schedules 1, 2, and 3 (if filed), or</p> <p><input type="checkbox"/> I have requested a copy of my 2023 IRS Tax Return Transcript to be mailed 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. <i>If more space is needed, provide a separate page with your name and student ID number at the top.</i></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: 20%;">IRS W-2/1099 Provided?</th> <th style="width: 20%;">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 style="text-align: right;">Total Amount of Income Earned from Work</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 10px;">You must submit copies of each W-2/1099 Form <u>and</u> a Verification of Non-Filing letter from the IRS.</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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<input type="checkbox"/>	<p>I was unemployed and had no income earned from work in 2023. You <u>must</u> submit a <u>Verification of Non-Filing</u> 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>																		

***To obtain a copy of your 2023 Tax Return Transcript go to www.irs.gov, click "Get Your Tax Record", then select "Get Transcript Online", or "Get Transcript by Mail", or call the IRS at 1-800-908-9946, or complete and mail IRS Form 4506-T. Be sure to request Tax Return Transcript **NOT** Tax Account Transcript.**

Office of Financial Aid

STEP 3 – MARRIED STUDENT and SPOUSE TAX FILING INFORMATION

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

Please check **one** box below that applies to the **STUDENT and SPOUSE**

<input type="checkbox"/>	The student and spouse have filed jointly and have <u>NOT</u> yet but will use the IRS Direct Data Exchange (DDX) on the FAFSA to load and submit their income onto the FAFSA. If you do use this tool, you will NOT need to submit 2023 IRS Tax Return Transcript. <i>(I understand that the verification process cannot be completed until this information is received.)</i> Date DDX was used _____.																								
<input type="checkbox"/>	The student and spouse filed separately or chooses not to use the IRS Direct Data Exchange (DDX) on the FAFSA , to transfer their income information. <input type="checkbox"/> We have attached signed copies of our 2023 IRS Tax Returns including schedules 1, 2, and 3 (if filed), or <input type="checkbox"/> We have requested all necessary copies of our 2023 IRS Tax Return Transcript(s) to be mailed to us and then forward it to the Financial Aid Office. <i>I understand that the verification process cannot be completed until this information is received.</i> Date 2023 IRS Tax Return Transcript was requested from IRS _____.																								
<input type="checkbox"/>	The student and/or spouse was employed in 2023 and did <u>not</u> file a tax return. Please list below the names of all the 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. <i>If more space is needed, provide a separate page with the student's name and ID number at the top.</i> <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><i>(Example) ABC's Auto Body Shop</i></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> </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 Form <u>and</u> a Verification of Non-Filing letter from the IRS.</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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<input type="checkbox"/>	The student and/or spouse was unemployed and had no income earned from work in 2023. Student and/or Spouse 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.																								

*To obtain a copy of your 2023 Tax Return Transcript go to www.irs.gov, click "Get Your Tax Record", then select "Get Transcript Online", or "Get Transcript by Mail", or call the IRS at 1-800-908-9946, or complete and mail IRS Form 4506-T. Be sure to request Tax Return Transcript **NOT** Tax Account Transcript.

STEP 4 – 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

Spouse's Name (Please Print)

Spouse's Signature (if married))

Date

Office of Financial Aid