

2025-2026 Verification Worksheet – Independent V5

Your Free Application for Federal Student Aid (FAFSA) was selected for a process called verification. Federal regulations require that we check the accuracy of the information provided on the 2025-2026 FAFSA. Final eligibility for financial aid cannot be determined until the requested documentation is received and reviewed.

_____	_____	_____	_____
Last Name	First Name	Student ID #	Phone

List below the people in your family:

Write the names, age, and relationship to student of all family members in the space(s) below. 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 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size. If more space is needed, attach a separate page and include the students name and ID number at the top.

Section A. Family Size Information

Full Name	Age	Relationship to Student
1. Yourself and your spouse (if you are married)		
		Self
		Spouse
2. 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 of their support from the student during the award year.		
3. Other persons if the following are true: They live with the student; they received more than half of their support from the student; and they will continue to receive more than half of their support from the student during the award year.		

Student Name: _____ **ID Number:** _____

Section B. Student Tax and Income Information

The 2023 Tax Return information can only be supplied by providing a tax return transcript or by using the IRS Data Retrieval Tool on the FAFSA.

Student	Spouse	TAX FILERS ONLY
<input type="checkbox"/>	<input type="checkbox"/>	I have used the IRS FA-DDX to transfer 2023 IRS tax return information into my FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	I have not yet used the IRS FA-DDX but will use the tool to transfer 2023 IRS tax information into my FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	I have attached a copy of my 2023 IRS Tax Return Transcript. (See Option 2). Personal copies of tax returns such as the 1040 (including schedules 1, 2, and 3) may be accepted.

Ways to get an IRS Tax Return Transcript:

- ✓ Request Transcript by Mail - Go to www.irs.gov, under "Get a Tax Transcript", select "Request by Mail". Make sure to request your IRS Tax Return Transcript and NOT the Account Transcript.
- ✓ Request Transcript Online - Go to www.irs.gov, under "Get Your Tax Record", select "Request Online", Make sure to request your Tax Return Transcript and NOT the Account Transcript.
- ✓ Automated Telephone Request 1-800-908-9946. Request your Tax Return Transcript.
- ✓ Paper Request Form - Go to www.irs.gov. Enter 4506-T in search box. Print the form, fill out completely, and submit directly to the IRS (requested transcript will be mailed to the filing address of record with the IRS)

Student	Spouse	NON TAX FILERS ONLY		
<input type="checkbox"/>	<input type="checkbox"/>	I did not work and had no income earned from work in 2023		
<input type="checkbox"/>	<input type="checkbox"/>	I worked in 2023 but I did not earn enough to be required to file taxes. (If you did work, please check mark whose income it was, list the employer, amount earned, and provide W-2's)		
		Name of Employer	Amount earned in 2023	Received a W-2? (Y/N)
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			

- ✓ Each parent is required to submit a letter of non-tax filing status from the IRS (dependent students are not required to submit proof of non-filing). You can obtain this letter by submitting IRS form 4506-T (Check Box 7) to the IRS. Form 4506-T can be found at www.irs.gov. The IRS will then forward a letter to you and our office will require a copy of that letter along with these completed verification documents.
- ✓ Parents can also receive verification of non-filing by requesting a copy of the tax transcript at www.irs.gov. If a transcript is not found, a statement saying you did not file taxes will display on the screen. Print the statement and provide a copy to our office.
- ✓ Please provide a copy of your W-2(s). If you do not have a copy, you may request your wage and income transcript from www.irs.gov



Student Name: _____ **ID Number:** _____

Section C. Identity and Statement of Educational Purpose

The student **must appear in person** at Northeastern State University (Financial Aid Department) to verify his or her identity by **presenting a valid government-issued photo identification (ID)**, such as, but not limited to, a driver's license, other state-issued ID, or passport. **The institution will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID.**

In addition, the student must sign, in the presence of a NSU Financial Aid Representative, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
(Print Student's Name)

Purpose and that the federal student financial assistance I may receive will only be use for educational purposes and to pay the cost of attending: _____ for 2025-2026.
(Name of Postsecondary Educational Institution)

Student Signature: _____ Date: _____

Signature of the Financial Aid Representative: _____ Date: _____

Section D. Certification and Signature

Signing this worksheet certifies that all of the information reported on it is complete and correct.

Student Signature: _____ Date: _____