

Your 2026-2027 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 (if filing jointly) or both parents (if filing separately) must complete and sign this worksheet, attach any required documents, and submit this form with the 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 (FA-DDX) to transfer your 2024 income information.

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

<input type="checkbox"/>	<p><b>I have used the IRS Direct Data Exchange (FA-FA-DDX)</b> to submit my income information to the FAFSA. If you (the student) use this tool, you will NOT need to submit 2024 IRS Tax Returns. <i>I understand that the verification process cannot be completed until this information is received.</i> Date IRS Direct Data Exchange (FA-DDX) used _____.</p>															
<input type="checkbox"/>	<p><b>I am unable to use the IRS Direct Data Exchange (FA-DDX) on the FAFSA</b>, to transfer my income information.</p> <p><input type="checkbox"/> I have attached a copy of my signed 2024 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 2024 IRS Tax Return Transcript to me and will 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 2024 IRS Tax Return Transcript was requested from IRS _____.</p>															
<input type="checkbox"/>	<p><b>I was employed in 2024 and/or had other income and resources that supported me in 2024 but was not required to file a 2024 Federal Tax Return.</b> Please list below the names of all your (the student's) employers and/or other income sources and the amount received from each in 2024. List every employer and/or other sources of income received even if they 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 and/or Other Income Sources</th> <th style="width: 20%;">IRS W-2/1099 Provided?</th> <th style="width: 20%;">Annual Amount Earned in 2024</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 colspan="2" style="text-align: right;"><b>Total Amount of Income Earned from Work</b></td> <td style="text-align: right;">\$</td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 5px;"><b>You must submit copies of each W-2 Form(s), 1099 Form(s), and/or proof of other income sources</b></p>	Employer's Name and/or Other Income Sources	IRS W-2/1099 Provided?	Annual Amount Earned in 2024	<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500.00							<b>Total Amount of Income Earned from Work</b>		\$
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<input type="checkbox"/>	<p><b>I was unemployed and had no income earned from work in 2024.</b></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 2024 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 2024 Federal Income Tax Return or if taxes were not filed copies of all W-2 forms, 1099 Forms, and/or proof of other sources of income.
- 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 2024 Federal Income Tax Return or if taxes were not filed copies of all W-2 forms, 1099 forms and/or proof of other sources of income.

#### When Students and Parents are submitting paper copies of their 2024 Federal 1040 Income Tax Returns, please make sure:

- Both student and at least one legal parent have 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 2024 Federal Tax Return Transcript from the IRS:

- Get Tax Return Transcripts Online
  - Go to [www.irs.gov](http://www.irs.gov), Select "Get Your Tax Record,"
  - Click "Sign in to your online account,"
  - Then request "Return Transcript," or
- Get Tax Return Transcript by Mail
  - Go to [www.irs.gov](http://www.irs.gov), Select "Get Your Tax Record,"
  - Click "Get Transcript by Mail,"
  - Then request the "Return Transcript," or
- Automated Telephone Request - - Call the IRS at 1-800-908-9946, or
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

#### Office of Financial Aid

## STEP 4 – PARENT(S) TAX FILING INFORMATION

The instructions below apply to each parent (or stepparent, if applicable) included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Your FAFSA indicates that you have **NOT** used the IRS Data Exchange to transfer your 2024 income information.

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

<input type="checkbox"/>	<p><b>Parent(s) have used the IRS Direct Data Exchange (FA-DDX)</b> to submit income information on the FAFSA. If the parent(s) used this tool, they will NOT need to submit 2024 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 (FA-DDX) used _____.</p>																		
<input type="checkbox"/>	<p><b>Parent(s) are unable to use the IRS Direct Data Exchange (FA-DDX) on the FAFSA</b> to transfer their income information.</p> <p><input type="checkbox"/> My parent(s) have attached a copy of their <u>signed</u> 2024 IRS Federal Tax Returns including schedules 1, 2, and 3 (if filed), or</p> <p><input type="checkbox"/> My parent(s) have requested a copy of their 2024 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 2024 IRS Tax Return Transcript was requested from the IRS _____.</p>																		
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<input type="checkbox"/>	<p><b>Parent(s) were unemployed and had NO income from any sources in 2024.</b></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