

Your 2026-2027 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 (FA-DDX) to transfer your 2024 income information.

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

<input type="checkbox"/>	<p>I have NOT yet but will use the IRS Direct Data Exchange (FA-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 2024 IRS Tax Return Transcripts. <i>(I understand that the verification process cannot be completed until this information is received.)</i> Date FA-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 2024 IRS Tax Return including schedules 1, 2, and 3 (if filed), or</p> <p><input type="checkbox"/> I have requested a copy of my 2024 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 2024 IRS Tax Return Transcript was requested from IRS _____.</p>																		
<input type="checkbox"/>	<p>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. Please list below the names of all your (the student’s) employers and/or other sources of income 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. <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 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> </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 Form(s), 1099 Form(s), and/or proof of other income sources</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										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 from any sources in 2024.</p>																		

***To obtain a copy of your 2024 Tax Return Transcript go to www.irs.gov, click “Get Your Tax Records and Transcripts”, sign in to your online account, (choose “Return Transcript”, and select “2024 Return Transcript”) 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 Return Transcript **NOT** Account Transcript.**

Office of Financial Aid

STEP 3 – MARRIED STUDENT and SPOUSE TAX FILING INFORMATION

The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student and spouse 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** or could not use the IRS Direct Data Exchange (FA-DDX) to transfer your 2024 income information.

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

<input type="checkbox"/>	<p>The student and spouse have filed jointly and have <u>NOT</u> yet but will use the IRS Direct Data Exchange (FA-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 2024 IRS Tax Return Transcript. (<i>I understand that the verification process cannot be completed until this information is received.</i>) Date FA-DDX was used _____.</p>																					
<input type="checkbox"/>	<p>The student and spouse filed separately or chooses not to use the IRS Direct Data Exchange (FA-DDX) on the FAFSA, to transfer their income information.</p> <p><input type="checkbox"/> We have attached signed copies of our 2024 IRS Tax Returns including schedules 1, 2, and 3 (if filed), or</p> <p><input type="checkbox"/> We have requested all necessary copies of our 2024 IRS Tax Return Transcript(s) to be mailed to us and 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> Date 2024 IRS Tax Return Transcript was requested from IRS _____.</p>																					
<input type="checkbox"/>	<p>The student and/or spouse were employed and/or had other income and resources that supported them in 2024 but were not required to file a 2024 tax return. Please list below the names of all employers and/or other sources of income and the amount received from each in 2024. List every employer and/or other source of income even if they 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></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 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 Form(s), 1099 Form(s), and/or proof of other income sources</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													Total Amount of Income Earned from Work		\$
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<input type="checkbox"/>	<p>The student and/or spouse were unemployed and had no income from any source in 2024.</p>																					

*To obtain a copy of your 2024 Tax Return Transcript go to www.irs.gov, click "Get Your Tax Records and Transcripts", sign in to your online account, (choose "Return Transcript", and select "2024 Return Transcript") 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 Return Transcript **NOT** 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