

Independent Verification Worksheet 2024 – 2025

*Please **TYPE** Responses*

Your FAFSA has been selected for a review process called "[Verification](#)." In this process, NAU will be comparing information from your FAFSA application with copies of you and your spouse's (if applicable) 2022 IRS Tax Return Transcripts, W-2 forms and/or other financial documents. The law requires completion of Verification before awarding and/or disbursing federal aid. If there are differences between your FAFSA application and your verification documentation, electronic corrections to your FAFSA may be required. Please upload the completed form and all supporting documentation to your [Financial Aid Student Portal](#).

A. STUDENT INFORMATION

Last Name	First Name	M.I.	Student ID #
Address (includes apt. no.)			Date of Birth
City	State	Zip Code	Phone Number

B. FAMILY SIZE INFORMATION

List yourself (and spouse, if applicable) and the people you/your spouse will provide **more than half of their financial support** for between **July 1, 2024 - June 30, 2025**, in the table below. Do **NOT** include unborn children or people you/your spouse do not provide more than half of their financial support.

1. **Student** – list yourself.
2. **Student's Spouse** – list your spouse, if married.
3. **Children** – list you and your spouse's dependent children only if they live with you/your spouse (or live apart because of college enrollment) and you/your spouse will continue to provide more than half of their financial support between **July 1, 2024, and June 30, 2025**.
4. **Other Member(s)** – list other people in your household only if they live with you/your spouse and you/your spouse will continue to provide more than half of their financial support between **July 1, 2024, and June 30, 2025**.

Full Name	Age	Relationship
		Self
		Spouse

If you need more space, attach a separate page with the student's name and ID number at the top.

C. STUDENT TAX INFORMATION

Check only **ONE** box below and submit the required documentation:

- I used the [IRS Direct Data Exchange](#) to transfer my 2022 tax information on to my FAFSA.
- I am unable to use the IRS Direct Data Exchange to transfer my 2022 tax information on to my FAFSA.
 - I am attaching a [2022 IRS Tax Return Transcript](#) or a **SIGNED** 2022 U.S. Income Tax Return **with all applicable schedules**.
- I will not file and am not required to file a 2022 U.S. Income Tax Return.
 - I am attaching a [2022 Verification of Non-Filing Letter](#) from the IRS.
 - I am attaching my 2022 W-2'(s) (or an equivalent document) from each employer (if applicable).
 - List the names of all employers and the amount earned from each in the table below (if applicable):

Employer Name	2022 Income Amount
	\$
	\$
	\$
	\$
	\$

- I filed a 2022 income tax return with a tax authority other than the IRS.
 - I am attaching a **SIGNED** copy of the 2022 income tax return filed with the relevant tax authority.

D. SPOUSE TAX INFORMATION (IF APPLICABLE)

Check only **ONE** box below and submit the required documentation.

- I used the [IRS Direct Data Exchange](#) to transfer my 2022 tax information on to my spouse's FAFSA.
- I am unable to use the IRS Direct Data Exchange to transfer my 2022 tax information on to my spouse's FAFSA.
 - I am attaching a [2022 IRS Tax Return Transcript](#) or a **SIGNED** 2022 U.S. Income Tax Return **with all applicable schedules**.
- I will not file and am not required to file a 2022 U.S. Income Tax Return.
 - I am attaching a [2022 Verification of Non-Filing Letter](#) from the IRS.
 - I am attaching my 2022 W-2'(s) (or an equivalent document) from each employer (if applicable).
 - List the names of all employers and the amount earned from each in the table below (if applicable):

Employer Name	2022 Income Amount
	\$
	\$
	\$
	\$
	\$

- I filed a 2022 income tax return with a tax authority other than the IRS.
 - I am attaching a **SIGNED** copy of the 2022 income tax return filed with the relevant tax authority.

E. SIGNATURE & CERTIFICATION

Each person signing this form certifies that all the information reported on it is complete and accurate.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student Signature: _____

Date: _____

F. HELPFUL RESOURCES

IRS Direct Data Exchange

As part of federal student aid eligibility, students will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student (and their spouse, if applicable) filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information was not available or could not be used, the student (and their spouse, if applicable) should provide the institution with a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

IRS Tax Return Transcript

If you are unable to use the IRS Direct Data Exchange, you can obtain a 2022 IRS Tax Return Transcript using one of the following options:

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."
- **Automated Telephone Request** – 1-800-908-9946.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T.

Transcripts are generally received within 10 business days from the IRS's receipt of your request except for the "Get Transcript Online" option which displays the transcript upon successful completion of the IRS's two-step authentication.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if the accuracy of the information on the signed copy of the income tax return is questioned, the tax filer must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed.