

## Independent Verification Worksheet 2026 – 2027

*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) 2024 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, 2026 - June 30, 2027**, 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, 2026, and June 30, 2027**.
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, 2026, and June 30, 2027**.

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 2024 tax information on to my FAFSA.
- I am unable to use the IRS Direct Data Exchange to transfer my 2024 tax information on to my FAFSA.
  - I am attaching a [2024 IRS Tax Return Transcript](#) or a **SIGNED** 2024 U.S. Income Tax Return **with all applicable schedules**.
- I will not file and am not required to file a 2024 U.S. Income Tax Return.
  - I am attaching a [2024 Verification of Non-Filing Letter](#) from the IRS.
  - I am attaching my 2024 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	2024 Income Amount
	\$
	\$
	\$
	\$
	\$

- I filed a 2024 income tax return with a tax authority other than the IRS.
  - I am attaching a **SIGNED** copy of the 2024 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 2024 tax information on to my spouse's FAFSA.
- I am unable to use the IRS Direct Data Exchange to transfer my 2024 tax information on to my spouse's FAFSA.
  - I am attaching a [2024 IRS Tax Return Transcript](#) or a **SIGNED** 2024 U.S. Income Tax Return **with all applicable schedules**.
- I will not file and am not required to file a 2024 U.S. Income Tax Return.
  - I am attaching a [2024 Verification of Non-Filing Letter](#) from the IRS.
  - I am attaching my 2024 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	2024 Income Amount
	\$
	\$
	\$
	\$
	\$

- I filed a 2024 income tax return with a tax authority other than the IRS.
  - I am attaching a **SIGNED** copy of the 2024 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

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### IRS Direct Data Exchange

As part of Federal student aid eligibility, students, and spouses (as appropriate), 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 spouse filed separate 2024 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 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2024 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 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 2024 IRS Tax Return Transcript using one of the following options:

- Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Sign in to your online account." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the [ID.me IRS Help Site](#).
- Get Transcript by Mail – Go to [www.irs.gov](http://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." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received **within 10 business days** from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received **within 10 business days** from the IRS's receipt of the paper request form.

### 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.

### **Individuals Granted a Filing Extension by the IRS**

- An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2024 must provide:
- A signed statement listing the sources of any 2024 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2024; and
- If self-employed, a signed statement certifying the amount of the individual's adjusted gross income (AGI), and the U.S. income tax paid for tax year 2024.

### **Individuals Who Filed an Amended IRS Income Tax Return**

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2024 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

### **Individuals Who Were Victims of IRS Tax-Related Identity Theft**

- An individual who was the victim of IRS tax-related identity theft must provide:
- A copy of the signed 2024 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; and
- An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.

### **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 institution questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the institution with a copy of the tax account information issued by the relevant tax authority before verification can be completed.