



# V5 - Dependent Verification Worksheet 2026 – 2027

*Please TYPE Responses*

Your FAFSA has been selected for "Verification." NAU will compare your FAFSA information with your and your parent(s)' **2024 IRS Tax Return Transcripts, W-2 forms, and other financial documents**. Verification must be completed before federal aid can be awarded or disbursed. If there are discrepancies, electronic corrections to your FAFSA may be needed. Please upload the completed form and all supporting documents 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, your [parents\(s\)/stepparent](#), and the people your parent(s)/stepparent 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 your parents do not provide more than half of their financial support.

- 1. Student** – list yourself.
- 2. Parent(s)**
  - If your parents are married (not separated), list both of your parents.
  - If your parents are not married to each other and live together, list both of your parents.
  - If your parents are divorced, separated, or never married, and do not live together, list the parent who provided more financial support during the last 12 months.
  - If your primary parent is remarried, list your primary parent and your stepparent.
  - If your parent is widowed, list the living parent.
- 3. Sibling(s)** – list your parent’s other dependent children only if they live with your parent(s) (or live apart because of college enrollment) and your parents 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 your parent(s) now and your parent(s) will continue to provide more than half of their financial support between **July 1, 2025, and June 30, 2026**.

Full Name	Age	Relationship
		Self
		Parent 1
		Parent 2/Stepparent

*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 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. PARENT(S)/STEPPARENT TAX INFORMATION**

Check only **ONE** box below and submit the required documentation. If two parents were reported in Section B of this worksheet, the instructions below apply to **BOTH** parents:

- I used the [IRS Direct Data Exchange](#) to transfer my 2024 tax information on to my child's FAFSA.
- I am unable to use the IRS Direct Data Exchange to transfer my 2024 tax information on to my child'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 by each parent in the table below (if applicable):

Parent 1 or 2	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: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Identity & Statement of Educational Purpose Verification Form 2026 – 2027



To complete V4 or V5 identity verification, a student must present an unexpired, valid, government-issued photo identification such as a U.S. passport, a driver's license, or other state-issued ID.

Check the box that applies below:

- The student appeared in person and presented acceptable identification to an institutionally authorized individual.
- The student was verified by a service provider that is compliant with National Institute of Standards and Technology Identity Assurance Level 2 (NIST IAL2). The institution received acceptable documentation directly from the service provider confirming the date of the verification and that the student's identity was verified under the NIST IAL2 standard.
- The student was unable to appear in-person and provided the institution with a copy of the acceptable identification presented to a notary and a signed notary statement.
- The student was unable to appear in-person and appeared on a video call with institutional personnel and presented the acceptable identification to an institutionally authorized individual.
- The student is a confined or incarcerated individual and was verified by an authorized official at the correctional facility where the individual is confined or incarcerated.

## Certification and Signature

### Certification and Signature

Each person signing below certifies that all the verification documents submitted with this certification are complete and correct.

**WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**

\_\_\_\_\_  
Print Student's Name

\_\_\_\_\_  
Student's ID Number

\_\_\_\_\_  
Student's Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (Required)

\_\_\_\_\_  
Date



**(To Be Signed at the Institution)**

The student must appear in person at North American University (NAU) to verify his or her identity by presenting an unexpired 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 by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

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

Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending North American University for 2025 – 2026.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

\_\_\_\_\_  
(Financial Aid Advisor's Signature)

\_\_\_\_\_  
(Type of Government-Issued ID Received)

\_\_\_\_\_  
(Date)



# Identity & Statement of Educational Purpose Verification Form

**(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at North American University to verify his or her identity, the student must provide to the institution:

- a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver’s license, other state-issued ID, or passport; and
- b) The original Statement of Educational Purpose provided below must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

## Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this Statement of  
 (Print Student’s Name)

Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending North American University for 2025 – 2026.

\_\_\_\_\_  
 (Student’s Signature) (Date)

\_\_\_\_\_  
 (Student’s ID Number)

## Notary’s Certificate of Acknowledgement

State of \_\_\_\_\_ City/County of \_\_\_\_\_ On \_\_\_\_\_,  
 (Date)

before me, \_\_\_\_\_, personally appeared, \_\_\_\_\_,  
 (Notary’s name) (Printed name of signer)

and proved to me because of satisfactory evidence of identification \_\_\_\_\_  
 (Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**  
 (seal) \_\_\_\_\_  
 (Notary Signature)

My commission expires on: \_\_\_\_\_  
 (Date)

## F. HELPFUL RESOURCES

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### IRS Direct Data Exchange

As part of Federal student aid eligibility, parents 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 parents 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 parents was not transferred via the FA-DDX and considered verified, the parents 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.