V5 Dependent 2025-26 Verification Worksheet

Your 2025-26 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 may ask you to confirm the information you and your parents 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 at least one parent must complete all sections and sign this worksheet and submit the form along with required documents to the financial aid office. We may ask for additional information if necessary.

A. Dependent Student's Information

Student's Last Name | Student's First Name | MI | ID Number

Student's Street Address (include apt. no.) | Student's Date of Birth

City | State | Zip | Student's Email Address

Student's Phone Number | Student's Alternate or Cell Phone Number

B. Dependent Student's Family Information

Family Size includes the following:

- The student.
- The student's parents (or stepparent, if applicable), even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family
- The student's siblings if all of the following are true:
  - They live with the student's parents (or live apart because of college enrollment);
  - They receive more than half of their support from the student's parents; and
  - They will continue to receive more than half their support from the student's parents during the award year.
- Other persons if the following are true:
  - They live with the student' parents,
  - They receive more than half of their support from the student's parents, and
  - They will continue to receive more than half their support from the student's parents during the award year.

The provided criteria for "dependent children" or "other persons" mirror the requirement that family size align with those the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S tax return at the time of completing the 2025-2026 FAFSA. As a result, the parent should not include any unborn children in the family size.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship
		Self

Student Name: _____ **Student ID Number:** _____

C. Dependent Student's Income Information to Be Verified – Complete either 1. or 2.

1. Verification of 2023 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). 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 2023 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 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 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 **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.**

**Please see last page for instructions to obtain a 2023 IRS Tax Return Transcript.

2. Verification of 2023 Income Information for Student Non-tax Filers – Statement attached

D. Parent's Income Information to Be Verified – Complete either 1. or 2.

1. Verification of 2023 Income Information for Parent Tax Filers

Important Note: 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 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the parents filed or will file a 2023 IRS income tax return(s). 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 2023 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 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 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 **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules**.

**Please see last page for instructions to obtain a 2023 IRS Tax Return Transcript.

2. Verification of 2023 Income Information for Parent Non-tax Filers – Statement attached

E. Identity and Statement of Educational Purpose

Section E is ONLY to be completed in person at the Institution or in front of a Notary.

Identity and Statement of Educational Purpose
(Signed in person at the Institution)

The student must appear in person at **Misericordia University – Financial Aid Office**
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.

Student Name: _____ **Student ID Number:** _____

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

If the student is unable to appear in person at **Misericordia University – Financial Aid Office**

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, which 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.

In addition, the student must sign, in the presence of a notary, the below Statement of Educational Purpose.

The following Statement of Educational Purpose is to be completed <u>only</u> in the presence of designated school official or notary.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose
(Print Student's Name)

and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **Misericordia University** for 2025-2026.

_____ _____ _____
(Student's Signature) (Date) (Student's ID Number)

_____ _____
(Financial Aid Administrator's Signature) Date

Notary's Certificate of Knowledge

State of _____

City/County of _____

On_____, before me, _____,
(Date) (Notary's name)

personally appeared, _____, and proved to me
(Printed name of signer)

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)

Return this <u>original form</u> with your <u>proof of Identity</u> to your school's financial aid office.

Student Name: _____ **Student ID Number:** _____

F. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. Each person signing below certifies that all of the verification documents submitted with this certification are complete and correct.
WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

The student and one parent whose information was reported on the FAFSA must sign and date this form.

_____ _____
Student's Signature Date

_____ _____
Parent's Signature Date

PLEASE: DO NOT EMAIL sensitive information such as tax documents, social security numbers or other personally identifiable information.

Fax to (570)674-3063 or mail to:

Misericordia University
Student Financial Services
301 Lake Street
Dallas, PA 18612

A **2023 IRS Tax Return Transcript may be obtained through:

• **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." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

• **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." 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.

• **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.

Student Name: _____ **Student ID Number:** _____

Student Non-Tax Filer Statement 2025-2026 Academic Year

Federal regulations require us to verify the accuracy of the information you provided on your 2025-2026 Free Application for Federal Student Aid (FAFSA).

Please complete this form and return to the Student Financial Services Office as follows:

a. Student (and spouse, if married) was not employed and had no income from work in 2023
b. Student (and spouse, if married) was employed in 2023, but will not file and is not required to file a 2023 income tax return with the IRS.

Income Certification and Summary of Untaxed Income:

List below all of the sources and amounts of income received for 2023. Include all untaxed income (e.g., unemployment, SSI, VA benefits) and taxable earnings (e.g., wages, interest income, tips).

Please submit supporting documentation for all income sources listed below such as copies of any W-2 form(s), 1099 form(s), or statements from your employer.

Source of Income for 2023	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2023
(Example) ABC's Auto Body	Yes	$4,500.00

My spouse and/or I had other income and resources that supported us for the 2023 tax year. [List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.

Source of Income	Annual Amount in 2023
(Example) Rental Property	$4,500.00

By completing this document, I certify that I have not filed and am not required to file a 2023 income tax return, and I have listed all income earned from work, other income, and resources for the 2023 tax year.

Signature_____

Date _____

Misericordia University
Student Financial Services
301 Lake St.
Dallas, PA 18612
Fax 570-674-3063

Student Name: _____ **Student ID Number:** _____

Parent Non-Tax Filer Statement 2025-2026 Academic Year

Federal regulations require us to verify the accuracy of the information you provided on your 2025-2026 Free Application for Federal Student Aid (FAFSA).

Please complete this form and return to the Student Financial Services Office as follows:

a. Parent(s) was not employed and had no income from work in 2023
b. Parent(s) was employed in 2023, but will not file and is not required to file a 2023 income tax return with the IRS.

Income Certification and Summary of Untaxed Income:

List below all of the sources and amounts of income received for 2023. Include all untaxed income (e.g., unemployment, SSI, VA benefits) and taxable earnings (e.g., wages, interest income, tips).

Please submit supporting documentation for all income sources listed below such as copies of any W-2 form(s), 1099 form(s), or statements from your employer.

Source of Income for 2023	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2023
(Example) ABC's Auto Body	Yes	$4,500.00

One or both of my parents had other income and resources that supported us for the 2023 tax year. [List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.

Source of Income	Annual Amount in 2023
(Example) Rental Property	**$4,500.00**

By completing this document, I certify that I have not filed and am not required to file a 2023 income tax return, and I have listed all income earned from work, other income, and resources for the 2023 tax year.

Signature_____

Date _____

Misericordia University
Student Financial Services
301 Lake St.
Dallas, PA 18612
Fax 570-674-3063