# 2026-2027 Verification Worksheet - Dependent Student FAQ's

Your 2026-2027 FAFSA was selected for verification, a process in which the financial aid office must obtain documentation to ensure accuracy of the information submitted on the FAFSA. Information provided on the FAFSA will be compared with required documents (2024 IRS Tax Returns, W2s, etc.). If there are differences, your FAFSA information may need to be electronically corrected.

## Why was I selected for Verification?

The main reasons for being selected for verification include that you were chosen randomly, the FAFSA you submitted was incomplete, your FAFSA contains estimated information, or the data you provided on the FAFSA is inconsistent. Verification is a federal regulation. Students who are selected for verification are not being punished; rather, verification prevents ineligible students from receiving aid by reporting inaccurate information and ensures that eligible students receive all of the aid for which they are qualified.

## What documents should be submitted?

You will be notified via email by the Financial Aid office. You can also check through your TigerConnect by selecting *Documents Requiring Attention*. The *Missing Documents* link will list out documents needed, including those related to verification.



## What happens if I do not complete verification?

Students who do not complete verification during the 2026-25 year cannot receive state, federal and some institutional financial aid for the entire 2026-25 year. Students can still attend class without completing verification, but those students must find an alternative method of payment for school besides financial aid. Students must complete verification by June 15, 2026. However, delays in submitting documents could result in ineligibility due to timing of file receipt and/or completion and late penalties may be applied to your student account if you fail to make satisfactory payment arrangements with the Business Office.

## What if I or my spouse applied for a tax extension?

An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the I RS beyond the automatic six-month extension for tax year 2024, must provide:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024;
- A signed statement listing the sources of any 2024 income and the amount of income from each source;
- 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.

## How do I request a copy of my Tax Transcript or Verification of Non-filing?

IRS Tax Returns and IRS Tax Transcripts can be requested one of several ways: (1) **Online** through http://www.irs.gov. Under the "Tools" section, select "Get a Tax Transcript." (2) **By mailing** in Form 4506-T to the IRS. For a Verification of Non-filing you must use Form 4506-T and check box 7. (3) **By calling** 1-800-908-9946. (4) **In person**, at your local IRS office. Generally, you will need to make an appointment to go in person.

## What if I (or my spouse) filed an Amended IRS Tax Return?

An individual who filed an amended I RS 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 include the change(s) made by the IRS, in addition to one of the following:

- Updated 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 I RS Form 1040 and the applicable schedules that were filed with the IRS.

## What if I (or my spouse) was a victim of IRS tax-related identity theft?

▪ 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.

## What Happens after I submit the documents to Financial Aid

If necessary, we may request additional information and/or documentation to resolve any discrepancies that arise during the processing of your paperwork. In the event we must contact you, please respond to these requests as quickly as possible, as failure to do so will only further delay disbursement of your financial aid. Once all documents are submitted for processing, turnaround time is within 7-10 business days. If necessary, a follow up email will be sent once verification is complete explaining any changes in EFC and/or awarding.

# ETBU
## FINANCIAL AID

# 2026-2027 Dependent Student Verification Worksheet

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 may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school 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 must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

## A. Student's Information

_____
Student's Last Name          First Name          M.I.

_____
Street Address (include apt. no.)

_____
City          State          Zip Code

_____
Cell Phone (include area code)

_____
Student ID Number

_____
Date of Birth

_____
Email Address

_____
Alternate Phone Number

## B. Family Size   Family Includes:

- 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 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's 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 with the requirement that family size align with those the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2026-2027 FAFSA. As a result, the student 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.

| List Household (Defined above) Full Name | Age | Relationship to Student |
|---|---|---|
| | | Self |
| | | |
| | | |
| | | |
| | | |

OVER

# C. Dependent <u>Student's</u> Income Information- <u>Choose A or B below</u>

☐   A. I filed a 2024 Tax Return

<u>Select an Option Below</u> (1 or 2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

☐   1.   Transferred information directly from IRS to the FAFSA.

☐   2.   Hand entered parent Income information and <u>was not able to</u> transfer director from the IRS.

Must provide either:

      1.   A signed copy of the 2024 income tax return with schedules.
      2.   OR obtain a tax transcript from the IRS.

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A **2024 IRS Tax Return Transcript** may be obtained through:

• **Get Transcript Online** – Go to 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, 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.

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☐   B. I did not file a 2024 Tax Return.

By completing option B, I certify that I have neither parent has filed nor is required to file a 2024 income tax return, and all their income earned from work, other income, and resources for the 2024 tax year are listed below.

<u>Also check any box that applies below:</u>

☐   I certify that I was not employed, and neither had no income from work in 2024.

☐   I was employed in 2024 and have listed below the names of all employers, the amount from each employer in 2024, and whether an IRS W-2 form, or an equivalent document is provided.
*[Provide copies of all 2024 IRS W-2 forms issued to your parents. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with your name and ID number at the top.]*

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2024 |
|---|---|---|
| *(Example) ABC's Auto Body Shop* | *Yes* | *$4,500.00* |
| | | |
| | | |
| | | |
| **Total Amount of Income Earned from Work** | | $ |

☐   I had other income and resources that supported us for the 2024 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 2024 |
|---|---|
| *(Example) Rental property* | *$4,500.00* |
| | |
| | |
| | |
| **Total Amount of Income** | $ |

# D. **Parent's** Household Income Information- <u>Choose A or B below</u>

<table>
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☐  A. My parent(s) filed a 2024 Tax Return

<u>Select an Option Below</u> (1 or 2)

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

☐  1.  Transferred information directly from IRS to the FAFSA.

☐  2.  Hand entered parent Income information and <u>was not able to</u> transfer director from the IRS.

Must provide either:

      3.  A signed copy of the 2024 income tax return with schedules.

      4.  OR obtain a tax transcript from the IRS.

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A **2024 IRS Tax Return Transcript** may be obtained through:

• **Get Transcript Online** – Go to 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, 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.

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☐  B. My Parents did not file a 2024 Tax Return.

**By completing option B, I certify that neither parent has filed nor is required to file a 2024 income tax return, and all their income earned from work, other income, and resources for the 2024 tax year are listed below.**

<u>Also check any box that applies below:</u>

☐  **I certify that neither parent was employed, and neither had income from work in 2024.**

☐  **One or both of my parents were employed in 2024 and have listed below the names of all employers, the amount from each employer in 2024, and whether an IRS W-2 form, or an equivalent document is provided.** *[Provide copies of all 2024 IRS W-2 forms issued to your parents. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with your name and ID number at the top.]*

| Employer's Name | IRS W-2 or an Equivalent Document Provided? | Annual Amount Earned in 2024 |
|---|---|---|
| *(Example) ABC's Auto Body Shop* | *Yes* | *$4,500.00* |
| | | |
| | | |
| | | |
| **Total Amount of Income Earned from Work** | | $ |

☐  **One or both of my parents had other income and resources that supported us for the 2024 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 2024 |
|---|---|
| *(Example) Rental property* | *$4,500.00* |
| | |
| | |
| | |
| **Total Amount of Income** | $ |

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**Certification and Signature**

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

_____   _____   _____  _____

Print Student's Name               Student's ID Number         Student's Signature (Required)     Date

_____   _____

Parent's Signature (Required)         Date

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

Return this form and any supporting documents by uploading them, AS A PDF ONLY, to your secure TIGERCONNECT Portal.

Tiger Connect | East Texas Baptist University