

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 and your parents 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 and at least one parent 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. Demographic Information

Student's Last Name	First Name	M.I.	Student's Social Security # or CWID
Street Address, Including Apartment #			Student's Date of Birth
City ()	State	Zip Code ()	Student's E-mail Address
Student's Home Phone Number		Student's Cell Phone or Alternate Number	

B. Family Size

Family Size - Includes the following:

- The student.
- The student's parents, 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" align with the requirement that family size align with whom 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 2026-2027 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	Name of College Currently Attending
		<i>Self</i>	<i>Mercy University</i>

C. Verification of Income Tax Information for Student Tax Filers

TAX RETURN FILERS

Important Note: The instructions below apply to **the student**.

Instructions: Complete this section if the student filed or will file a 2024 IRS income tax return(s). 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 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 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**.

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.

TAX RETURN NONFILERS

The instructions and certifications below apply to the student. Complete this section if the student will not file and is not required to file a 2024 income tax return with the IRS.

By completing this section, I certify that I have not filed and am not required to file a 2024 income tax return, and I have listed all income earned from work, other income, and resources for the 2024 tax year.

Also check any box that applies below:

- I was not employed and had no income earned from work in 2024.
- I was employed in 2024 and have listed below the names of all employers, the amount earned 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 you. 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 equivalent document provided?	Annual Amount Earned in 2024
Total Amount of Income Earned from Work:		\$

- I had other income and resources that supported me for the 2024 tax year. [Please provide a separate page listing sources of income with your name and ID number at the top.]

Student's Name: _

SSN or CWID:

D. Verification of Income Tax Information for Parent Tax Filers

Note: If two parents were reported in Section B of this worksheet, the instructions below refer and apply to both parents.

TAX RETURN 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 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the parents filed or will file a 2024 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 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.**

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.

TAX RETURN NONFILERS

The instructions and certifications below apply to each parent (or stepparent, if applicable) included in the household. Complete this section if the parent(s) will not file and are not required to file a 2024 income tax return with the IRS.

By completing this document, 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.

Also check any box that applies below:

- I certify that neither parent was employed, and neither had income earned 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 earned 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 equivalent document provided?	Annual Amount Earned in 2024
Total Amount of Income Earned from Work:		\$

- One or both parents had other income and resources that supported us for the 2024 tax year. [Please provide a separate page listing sources of income with your name and ID number at the top.]

E. Information for Individuals with Unusual Circumstances

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 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 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 we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

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

F. Certification and Signatures

Each person signing below certifies that all of the verification documents submitted with this certification are complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student's Name (PRINT)

Student's Signature

Date

Parent's Signature

Date

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet directly to Student Financial Services. You
should make a copy of this worksheet for your records.***

Federal Student Aid - Verification of Identity Worksheet

Note: To complete 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.**

STUDENT – You must present your identification using one of the following methods. A photocopy via e-mail, text, or US postal mail is not acceptable (unless accompanied by a signed notary statement).

Mercy University SFS Staff Member – When verifying identity, check the box that applies below:

- The student appeared in person and presented acceptable identification to an institutionally authorized individual (SFS/Financial Aid Office).
- 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 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.
- 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.

<p>University Use Only: SFS Staff Name: _____ Date Processed: _____</p>
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