

2024-2025 Independent Verification Worksheet – Completion Guide

Please use this guide to help you complete the required 2024-2025 Verification Worksheet.

Step 1: Student Information

Fill in personal information as directed.

Step 2: Household Information

Use the table to indicate all members of your family household. This should include the student, the student's spouse, the student's children, and any other members of the household for which the student provides more than 50% of their monetary support. Also indicate whether each household member will be enrolled in college at least half-time during the 2024-2025 school year.

Step 3: Student Marital Status

Select the applicable marital status for the student. Unless "single" is the status selected, indicate the marital status date. Leave blank if "single."

Step 4: Student Tax Filing Status for calendar year 2022

If the student filed a 2022 tax return, select the appropriate box under "Option 1."

If the student did not file a 2022 tax return, select the appropriate box under "Option 2."

Step 5: Certifications and Signatures

Sign and date. Both the student and spouse (if applicable) will need to sign and date the form. ***Do not submit any additional documents containing Personally Identifiable Information, such as a social security number, via email.***

DO NOT SUBMIT THIS PAGE TO THE OFFICE OF STUDENT FINANCIAL SERVICES



Your Free Application for Federal Student Aid (FAFSA) has been selected for federal or institutional verification. This process confirms the information that you and your parent reported on the FAFSA. If there is any conflicting information, your FAFSA will be corrected by our office. You and at least one parent must complete and sign this worksheet. Our office may request additional information. Submit this form along with other required documents to the Office of Student Financial Services. Completion and submission of this document provides the Office of Student Financial Services with permission to make corrections to your FAFSA in accordance with Federal Department of Education verification regulations. If you have questions about verification, please contact our office by phone at 610-409-3600 or by email at financialaid@ursinus.edu.

Student Name _____

Ursinus ID

Permanent Address

Date of Birth

City

State

Zip Code

Phone Number

Year in College (freshman, sophomore, junior, senior)

Email Address

Resident (on campus) Commuter (living with parent) Off-Campus (not with parent)

Number of Household Members: List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2024, through June 30, 2025, even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2025.
- Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2024, and June 30, 2025, and include the name of the college.

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

[illegible]

Step 3: Student Marital Status

Student Marital Status: ___ Single ___ Married/Remarried ___ Separated ___ Divorced/Widowed

Student Marital Status Date (if not Single): ____/____
MM YYYY

Step 4: Student Tax Filing Status for calendar year 2022: Please complete Option 1 or Option 2.

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 2022 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). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at studentaid.gov.* In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Option 1: Student filed a 2022 IRS Tax Return: Please select an option below.

Check the box that applies:

☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2022 IRS income tax return information into the student's FAFSA.

☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2022 IRS income tax return information into the student's FAFSA.

☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2022 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return. Select an option below:**

___ Check here if a **2022 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** is provided.

___ Check here if a **2022 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** will be provided later.

*If the student and spouse filed separate 2022 IRS income tax returns, the IRS DRT cannot be used and the **2022 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** must be provided for each.

Option 2: Student was a Non-tax Filer for calendar year 2022: I certify that I did not, and am not required to file a 2022 U.S. federal tax return. Please select an option below.

☐ The student and spouse were not employed and had no income earned from work in 2022.

☐ The student and/or spouse were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	2022 Amount Earned	IRS W-2 Provided?

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2023 that indicates a 2022 IRS income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of non-filing is provided.

___ Check here if confirmation of non-filing will be provided later

Step 5: Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

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

Student Signature (***typed signatures NOT accepted***)

Date

Spouse Signature (Optional) (***typed signatures NOT accepted***)

Date

Please return Verification Worksheet and all appropriate documentation to:

Ursinus College
Office of Student Financial Services
601 E. Main St.
Collegeville, PA 19426
Fax: 610-409-3662

DISCLAIMER: Do not email any documents containing Social Security numbers to our office – this is not a secure method to provide this information to us.