206-2027 Independent Aggregate 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, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and a parent whose information was reported on the FAFSA must complete and sign this institutional verification information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

A. Independent Student's Information

Student Last Name First Name MI

Students Social Security Number

Student Street Address (include Apt. Number)

Student Date of Birth

City State Zip Code

Student email

Student Home Phone Number (include area code)

Student Alternate/Cell #

B. Independent Student's Family Information

Number of Household Members and Number in College

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, 2025, through June 30, 2026, 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, 2025, and June 30, 2026, 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.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)
		Self		

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

C. Independent Student's Income Information to be Verified

1. **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 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the student and spouse filed or will file a 2024 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 FAFSA.gov*. In most cases, no further documentation is needed to verify 2024 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2024 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 2024 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 **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 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." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- 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.

If the student and spouse filed separate 2024 IRS income tax returns, the IRS DRT cannot be used and the **2024 IRS Tax Return Transcript(s)** must be provided for each or a signed copy of the 2024 income tax return and applicable schedules.

____ Check here if a **2024 IRS Tax Return Transcript(s)** is provided.
____ Check here if a **2024 IRS Tax Return Transcript(s)** will be provided later.

2. **Verification of 2024 Income Information for Student Non-tax filers**

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

Check the box that applies:

☐ The student and spouse were not employed and had no income earned from work in 2024.

☐ The student and/or spouse 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 the student and spouse by their employers]. 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 the student's 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		$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2024 that indicates a 2023 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

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Verification of 2024 Income 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 2023, must provide:

- A copy of IRS Form 4868, ‘‘Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,’’ that was filed with the IRS for tax year 2024;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2024, or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation
- 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. *Note- An individual granted a filing extension beyond the automated 6 month extension may be required to submit tax information by using the IRS DRT, by obtaining a copy of the tax return & the applicable schedules that were filed that lists 2024 tax information.

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:

- IRS DRT information on an ISIR record with all tax information from the original tax return; or
- 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.

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 Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; ***and***
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands 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.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

D. High School Completion Status

Provide <u>one</u> of the following documents to indicate the student’s high school completion status when the student begins college in 2026–2027:

- A copy of the student’s high school diploma.
- For students who completed secondary education in a foreign country, a copy of the “secondary school leaving certificate” or other similar document.
- A copy of the student’s final official high school transcript that shows the date when the diploma was awarded.
- A State certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor’s degree.
- For a student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.

- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

A student who is unable to obtain the documentation listed above must contact the financial aid office.

E. Identity and Statement of Education Purpose (To be Signed at the Institution.)

The student must appear in person at _____ to
(Name of Postsecondary Educational Institution)
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.

If the student is unable to appear in person at Southern Arkansas University Tech 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.

Statement of Educational Purpose

I certify that I _____ am the individual signing
(Print Student's Name)

this Statement of 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 _____ for 2026–2027.
(Name of Postsecondary Educational Institution)

_____ _____
(Student's Signature) (Date)

_____
(Student's ID Number)

Sample of a Notary's Certificate of Acknowledgement
Notary's certification may vary by State

State of _____
City/County of _____
On_____, before me, _____,
(Date) (Notary's name)
personally appeared, _____, and proved to me
(Printed name of signer)
on the basis 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)

Certification and Signature
(Independent Student)

F. Certification and Signature

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.

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