

2026-2027 Dependent Verification Worksheet – Completion Guide

Please use this guide to help you complete the required 2026-2027 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 your supporting parent(s)*, siblings, and any other members of the household for which your supporting parent(s) provides more than 50% of their monetary support.

*The supporting parent is the parent who has provided more than 50% of the student's financial support in the last 12 months.

- If the student is supported by both biological parents in the same household, both parents should include their information on this form.
- If the student is primarily supported by only one biological parent, the student should include only this parent's information.
- If the student is primarily supported by one biological parent and a stepparent, both the biological parent and stepparent's information should be included.

Step 3: Verification of 2024 Income Information for Student Tax Filers

If the student filed a 2024 federal tax return, they should read and complete this section and skip Step 4. If the student did not file a 2024 federal tax return, they should skip this section and complete Step 4.

Step 4: Verification of 2024 Income Information for Student Non-tax Filers

If the student did not file a 2024 federal tax return, they should skip Step 3 and should read and complete Step 4.

Step 5: Supporting Parent(s) Information

Provide the name(s) of the supporting parent(s) with whom the student lives. If the supporting parent is married to someone other than the student's other biological parent, include their information as well. (See asterisk in Step 2 for further clarification.) If supporting parents are not married, do not include marital status date. Only select "Never Married/Single" if the student's biological parents were never married and the student currently resides with only one supporting parent.

Step 6: Verification of 2024 Income Information for Parent Tax Filers

If the supporting parent(s) filed a 2024 federal tax return, they should read and complete this section and skip Step 7. If the supporting parent(s) did not file a 2024 federal tax return, they should skip this section and complete Step 7.

Step 7: Verification of 2024 Income Information for Parent Non-tax Filers

If the supporting parent(s) did not file a 2024 federal tax return, they should skip Step 6 and should read and complete Step 7.

Step 8: Certifications and Signatures

Sign and date. Both the student and one custodial parent 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.***

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2026-2027 Dependent Verification Worksheet – Completion Guide (continued)

Unique individual tax-filing scenarios

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 includes the change(s) made by the IRS, in addition to one of the following:

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

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2026-2027 Dependent Verification Worksheet

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 Financial Aid. Completion and submission of this document provides the Office of Financial Aid 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.

Step 1: Student Information

Student Name _____

Ursinus ID

Permanent Address

Phone Number

City

State

Zip Code

Email Address

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

Residency Status for 2026-2027:

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

Step 2: Household Information

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

- The student
- The supporting parents (including a stepparent) even if the student doesn't live with the parents. 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'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 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 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.

[illegible]

Step 3: Verification of 2024 Income Information for Student Tax 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 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.

Check the box that applies:

☐ The student has used the FA-DDX 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 FA-DDX 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 FA-DDX in *FAFSA on the Web*, and instead will provide the school with a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return. Select an option below:**

___ Check here if a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** is provided.

___ Check here if a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** will be provided later.

*If the student has a unique individual tax-filing scenario (amended tax return, tax extension, identity theft, or filed a non-IRS income tax return), they should review page 2 of the included completion guide for more information

Step 4: Verification of 2024 Income Information for Student Non-tax Filers:

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 document, 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 an Equivalent Document Provided?	Annual Amount Earned in 2024
(Example) ABC's Auto Body Shop	Yes	\$4,500
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.]

Employer’s Name	Annual Amount in 2024
(Example) Rental Property	\$4,500
Total Amount of Income	\$

Step 5: Supporting Parent(s) Information

Parent Contributor 1 Name

Parent Contributor 2 Name

Parent Contributor Phone Number

Parent Contributor Email Address

Parent Marital Status:

- ☐ Never Married/Single (if selected, skip to Step 5) ☐ Unmarried-Parents Live Together (if selected, skip to Step 5)
- ☐ Married/Remarried ☐ Divorced/Separated ☐ Widowed

Parent Marital Status Date: ____/____/____
MM YYYY

Step 6: Verification of 2024 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 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 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.

Check the box that applies:

☐ The parents have used the FA-DDX in *FAFSA on the Web* to transfer 2024 IRS income tax return information into the student's FAFSA.

☐ The parents have not yet used the IRS FA-DDX in *FAFSA on the Web* but will use the tool to transfer 2024 IRS income tax return information into the student's FAFSA.

☐ The parents are unable or choose not to use the FA-DDX in *FAFSA on the Web*, and instead will provide the school with a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return. Select an option below:**

___ Check here if a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** is provided.

___ Check here if a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** will be provided later.

* If the parents filed separate 2024 IRS income tax returns, a **2024 IRS Tax Return Transcript(s) or signed copy of IRS 1040 tax return** must be provided for any parent contributor who does not utilize the IRS DDX.

**If the parents have a unique individual tax-filing scenario (amended tax return, tax extension, identity theft, or filed a non-IRS income tax return), they should review page 2 of the included completion guide for more information

Step 7: Verification of 2024 Income Information for Parent Non-tax Filers:

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 an Equivalent Document Provided?	Annual Amount Earned in 2024
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500</i>
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.]

Employer’s Name	Annual Amount in 2024
<i>(Example) Rental Property</i>	<i>\$4,500</i>
Total Amount of Income	\$

Step 8: Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

Parent Signature (*typed signatures NOT accepted*)

Date

Please email financialaid@ursinus.edu to request a secure link to submit your Verification Worksheet and all appropriate documentation.

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.