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Troy University
Financial Aid Office
134 Adams Administration Bldg.
Troy, AL 36082

Independent Verification Worksheet (V5) 2024-2025

Call 1-800-414-5756 for questions

V5

Your 2024-2025 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 provide 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 must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office at Troy University. The financial aid office may ask for additional information. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed. You must return this form to the address listed on this form.

A. Student Information

Student's Name: _____ Student ID Number: _____
First M.I. Last

Date of Birth: _____ Home Phone: _____ Cell Phone: _____

Email: _____ Work Phone: _____

Address: _____
Street/P.O. Box City State Zip

B. Family Information

List below the people in the student's household. Include:

- The student.
- The student's spouse, if applicable.
- The student's dependent children if the following are true:
  - They live with the student (or live apart because of college enrollment),
  - They receive more than half of their support from the student, and
  - They will continue to receive more than half their support from the student between July 1, 2024, and June 30, 2025.
- Other persons if the following are true:
  - They live with the student;
  - They receive more than half of their support from the student, and
  - They will continue to receive more than half their support from the student between July 1, 2024, and June 30, 2025.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom 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 2024-2025 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.

Full Name	Age	Relationship
You, the student		

Student's Name_____ **Student ID Number:**_____

C. Verification of 2022 IRS Income Tax Return Information for Student Tax Filers

Instructions: Complete this section if the student and spouse filed or will file a 2022 IRS income tax return(s). *The best way to verify income is by using the* using the FUTURE Act Direct Data Exchange (FA-DDX) that transfers IRS federal tax information (FTI) to the FAFSA on the Web. In most cases, no further documentation is needed to verify 2022 IRS income tax return information that was transferred into the student's FAFSA using the FA-DDX if that information was not changed by the FAFSA filer.

Check the box that applies:

☐ The student (and, if married, my spouse) has used the FA-DDX to directly import my 2022 IRS income tax return information into the student's FAFSA. **Must include W-2 Forms and applicable schedules.**

☐ The student (and, if married, my spouse) is unable or could not use the FA-DDX, and instead will provide the school a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return. Must include W-2 Forms and applicable schedules.**

A 2022 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 "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

If the student and spouse filed separate 2022 IRS income tax returns, **2022 IRS Tax Return Transcripts or a signed copy of the 2022 income tax and applicable schedules must be provided for each.**

☐ Check here if a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 tax return, W-2 Forms and applicable schedules** is provided.

☐ Check here if a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 tax return, W-2 Forms and applicable schedules** will be provided later.

Verification of 2022 Income Information for Student Nontax 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 2022 income tax return with the IRS.

Check the boxes that apply:

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

☐ The student's spouse (if married) was 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 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. If more space is needed, provide a separate page with the student's name and student's ID number at the top.

Employer's Name	2022 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	$2,000.00 (example)	Yes (example)

Foreign Country Non-tax Filers Only: Provide documentation from a relevant tax authority other than the IRS that indicates a 2022 income tax return was not filed or a signed and dated statement from the student (and, if married, spouse) that they were not required to file a tax return for 2022.

☐ Check here if confirmation of nonfilling is provided. ☐ Check here if signed and dated statement is provided.

Student's Name_____ **Student ID Number:**_____

Instructions: Please complete all the fields below. If any field is left blank, we will consider the form incomplete, we will **NOT** assume 0.

STUDENT (Yearly Amount)	2022 Additional Financial Information	SPOUSE, if married (Yearly Amount)
	Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3: line 3	
	Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	

	Child support received for all children for the last completed calendar year. For example, if the student is completing the FAFSA in October 2024, they will report child support received for the 2023 calendar year. If the student is completing the FAFSA in January 2025, they will be reporting child support received for 2024. Don't include foster care or adoption fees.	

STUDENT (Yearly Amount)	2022 Untaxed Income	PARENT(S) (Yearly Amount)
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1-total of lines 16 + 20.	
	Tax exempt interest income from IRS Form 1040-line 2a.	
	Untaxed portions of IRA distributions from IRS Form 1040- (line 4a minus 4b) Exclude rollovers. If negative, enter a zero here.	
	Untaxed portions of pensions from IRS Form 1040- (line 5a minus 5b) Exclude rollovers. If negative, enter a zero here.	
	Foreign earned income exclusion from IRS Form 1040 Schedule 1: line 8d	

Student's Name_____ **Student ID Number:**_____

D. Identity and Statement of Educational Purpose

Instructions:

Either:

- The student must appear in person at the Troy University Financial Aid Office to 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. Troy University will maintain a copy of the student's photo ID that is annotated 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 Troy University Financial Aid Office official, the **Statement of Educational Purpose** below.

Or:

- If the student is unable to appear in person at the Troy University Financial Aid Office to verify his or her identity, the student must provide:

  (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as, but not limited to, a driver's license, other state-issued ID, or passport; and

  (b) The original notarized **Statement of Educational Purpose** provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational Purpose
(Print Student's Name)
and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Troy University for 2024-2025.

_____ _____ _____
(Student's Signature) (Date) (Student's ID#)

Notary's Certificate of Acknowledgment

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

FOR OFFICE USE ONLY: Attach photocopy of ID after verifying identity

Document Used:_____Date Received:_____Authorized Name:_____

Student's Name_____ **Student ID Number:**_____

E. Certification and Signature

Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:

☐ You must complete the FA-DDX that transfers IRS federal tax information or submit a copy of your 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return . Must include W-2(s) and other applicable schedules when you file your IRS income tax return for verification to be considered complete.

☐ Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

☐ An individual who filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 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 2022 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 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

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

_____ _____

Student's Signature Date

_____ _____

Spouse's Signature (Optional) Date