

Financial Aid

V5 Aggregate 2024-25 Verification Worksheet for Dependent Students

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 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 your FAFSA must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to us. We may ask for additional information. If you have questions about verification, contact us as soon as possible so that your financial aid will not be delayed.

Bring this completed Verification Worksheet and the ID to be copied in person to: Tulane University Financial Aid, Gibson Hall, Suite #130, 6823 St. Charles Avenue, New Orleans, LA or University Financial Aid, Suite #1213, 1440 Canal Street, New Orleans, LA

Student's Last Name	Student's First Name	Student's M.I.	Last 4 Digits of Student's Social Security Number
Student's Street Address	s (include apt. no.)	Student's Date of Birth	
City	State	Zip Code	Student's Email Address
Student's Home or Cell F	Phone Number (include area co	Student's Tulane ID Number (if known)	

B. Dependent Student's 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:

Dependent Student's Information (please print)

- 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 2024-2025 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		Relationship
		Self

Student's Na	me: Last 4 Digits of Student's SSN:
C. De	pendent Student's Income Information to Be Verified - Check the box that applies:
	I, the student, will not file and am <u>not required</u> to file a 2022 income tax return with the IRS, AND I understand that I must ALSO complete and return a 2024-2025 Student Non-Filer Form .
	I, the student, have filed a 2022 income tax return but have <u>ALSO</u> filed, or will file, an <u>AMENDED</u> 2022 IRS tax return and I understand that I must ALSO 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, the student am required to file a 2022 IRS income tax return, and have been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2022, AND I understand that I must ALSO provide the following documentation: • A signed statement listing the sources of any 2022 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 2022; • A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2022; 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 2022.
	I, the student have filed a 2022 income tax return. As part of federal student aid eligibility, students, and spouses (as appropriate), 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 student and spouse filed separate 2022 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 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return 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
 "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.
- <u>Automated Telephone Request</u> 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.

Individuals Who Were Victims of IRS 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, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; **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

An individual filed or will file a 2022 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2022 income tax return(s).

Student's I	Name:	Last 4 Digits of Student's SSN:
D.	included in th	ome Information to Be Verified - Check the box that applies: Important Note: The instructions below apply to each parent se household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2022 or had a change in after the end of the 2022 tax year on December 31, 2022.
		ents will not file and are <u>not required</u> to file a 2022 income tax return with the IRS, AND understand that they must ALSO e and return a 2024-2025 Parental Non-Filer Form .
	that they filed with Upo A 2 sign	ents have filed a 2022 income tax return but have <u>ALSO</u> filed, or will file, an <u>AMENDED</u> 2022 IRS tax return and understand must ALSO provide a signed copy of the 2022 IRS Form 1040X , "Amended U.S. Individual Income Tax Return," that was in the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following: dated income and tax information from the IRS on an ISIR record with all tax information from the original tax return; (1022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be need), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or igned copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.
	automat As Ac Ac If s	ents are required to file a 2022 IRS income tax return, and have been granted a filing extension by the IRS beyond the ic six-month extension for tax year 2022, AND understand that they must ALSO provide the following documentation: igned statement listing the sources of any 2022 income and the amount of income from each source; opy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022; opy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2022; and elf-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income paid for tax year 2022.
	As part of from the 2022 IRS most case	ents have filed a 2022 income tax return. of federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information 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 income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In see, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using and tax information directly from the IRS.

If 2022 income tax return information for the parents was not available or could not be used, the parents should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return 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
 "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.
- <u>Get Transcript Online</u> Go to <u>www.irs.gov</u>, 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.
- <u>Automated Telephone Request</u> 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.

Individuals Who Were Victims of IRS 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, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; **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

An individual filed or will file a 2022 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide a signed copy of that 2022 income tax return(s).

Student's Name:		Last 4 Digits of Student's SSN:		
E. Identity and Statem	ent of Educational P	urpose (To Be Sig	ned at the Institution)	
Receiving School Official's Name	Signature		 Date	
	ch as, but not limited to, a tated by the institution with	driver's license, other s	state-issued ID, or passport. Th	ng an unexpired valid government- ne institution will maintain a copy of of the official at the institution
In addition, the student must sign,	in the presence of the inst	itutional official, the fol	lowing English or Spanish State	ement:
Statement of Educational Purpo	se: I certify that I	(Print Student's	am the	e individual signing this
Statement of Educational I and to pay the cost of atte		ral student financial as		be used for educational purposes
(Student's Signature)		(Date)	(Student's ID Nu	mber)
El estudiante debe comparecer en p fotografía (ID) válida emitida por el g pasaporte, entre otros. La institución se recibió y revisó, y el nombre del f Además, el estudiante debe firmar, e continuación.	gobierno que no haya expir n conservará una copia de funcionario de la institución	ado, como una licenci la identificación con fo autorizado a recibir y	a de conducir, otro tipo de iden tografía del estudiante en la cu revisar las identificaciones de l	tificación emitida por el estado o al se anotará la fecha en la que os estudiantes
Declaración de Propósito Educativo Declaración de Propósito I para fines educativos y pa	E <i>ducativo,</i> y que la ayuda f	inanciera federal estud	diantil que yo pueda recibir sólo	
[Firma del estudiante]		[IFecha]	Número de Identificación	del estudiante]

Student's Name:		L	Last 4 Digits of Student's SSN:	
University to verify his or her acknowledged in the notary spassport; and (b) The original	identity, the student must prostatement below, or that is proal Statement of Educational Parate page than the Statemen	ovide (a) A copy of the esented to a notary, su urpose (in English or S): <u>ONLY</u> if the student is UNABLE to appear in person at Tulane e unexpired valid government-issued photo identification (ID) that is uch as, but not limited to a driver's license, other state-issued ID, of Spanish) provided below, which must be notarized. If the notary ose, there must be a clear indication that the Statement of	
	Verification Worksheet. The		Norksheet, and the notary seal must be applied to the copy (front a sheet (along with the notarized copy of the ID, front and back) must	
Statement of Educational P	Purpose: I certify that I		am the individual signing this	
Statement of Educational Pu the cost of attending Tulane	rpose and that the Federal stu	udent's Name) udent financial assista	ance I may receive will only be used for educational purposes and to	э рау
(Student's Signature)		(Date)	(Student's ID Number)	
Declaración de Propósito Ed		[Imprimir Nombre de era federal estudiantil	, soy el individuo que firma esta el Estudiante] I que yo pueda recibir, sólo será utilizada para fines educativos y pa	ara
[Firma del Estudiante]		[IFecha]	[Número de Identificación del Estudiante]	
Notary's Certificate of Ackno State of	owledgement Notary's certific			
City/County of				
On	_, before me,		,	
(Date)	(Notary's name)			
personally appeared,		, and	I proved to me	
	(Printed name of signer)			
on basis of satisfactory evi				
to be the above-named person		ed government-issued trument	I photo ID provided)	
to be the above harmed person	who dighted the follogoling into	tramont.		
WITNESS my hand and offici	al seal			
(seal)		_	(Notary signature)	_
My commission expires on _ (Date)			

Student's Name:	Last 4 Digits of Student's SSN:
Certifications and Signatures Each person signing this worksheet certifies that all of the information reported on this worksheet is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.	information on this worksheet, you may be fined,
TAI SA Must sight and date.	You should make a copy of this worksheet for your record
Print Student's Name	Student's ID Number
Student's Signature (Required)	Date
Parent's Signature (Required)	Date ver. 06/11/2024

Bring this completed Verification Worksheet and the ID to be copied in person to:

Tulane University Financial Aid, Gibson Hall, Suite #130, 6823 St. Charles Avenue, New Orleans, LA

or University Financial Aid, Suite #1213, 1440 Canal Street, New Orleans, LA

ONLY if NOT attending classes in New Orleans AND UNABLE to return the form in person, post this notarized Worksheet and ID copy* to:
Tulane University Financial Aid, Gibson Hall, Suite #130, 6823 St. Charles Avenue, New Orleans, LA 70118

*The ID copy (front and back) must be included with the completed Verification Worksheet, and, if notarized, the notary seal must be applied to the copy (front and back) of the ID as well as the Verification Worksheet.