TULANE UNIVERSITY

*Financial Aid*

**V5 Aggregate**

## 2026-27 Verification Worksheet for Dependent Students

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 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**

**A. Dependent Student's Information (please print)**

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 (include apt. no.) _____

Student's Date of Birth _____

City _____ State _____ Zip Code _____

Student's Email Address _____

Student's Home or Cell Phone Number (include area code) _____

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:
  - 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 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.

| Full Name | Age | Relationship |
|---|---|---|
| | | *Self* |
| | | |
| | | |
| | | |
| | | |



**Continue to Next Page >>>>>>>>>>>**

**Student's Name:** _____ **Last 4 Digits of Student's SSN:** _____

**C. Dependent Student's Income Information to Be Verified - Check the box that applies:**

☐ I, the student, will not file and am not required to file a 2024 income tax return with the IRS, **AND** I understand that I must **ALSO** complete and return a **2026-2027 Student Non-Filer Form**.

☐ I, the student, have filed a 2024 income tax return but have **ALSO** filed, or will file, an **AMENDED** 2024 IRS tax return and I understand that I must **ALSO** 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:

- Updated 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.

☐ I, the student am required to file a 2024 IRS income tax return, and have been granted a **filing extension** by the IRS beyond the automatic six-month extension for tax year 2024, **AND** I understand that I must **ALSO** provide the following documentation:

- 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.

☐ I, the student have filed a 2024 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 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.

If 2024 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 **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.

**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 2024 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 2024 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 2024 income tax return(s).

**Student's Name:** _____ **Last 4 Digits of Student's SSN:** _____

**D. Parents' Income Information to Be Verified - Check the box that applies:** Important Note: The instructions below apply to each parent 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 the end of the 2024 tax year on December 31, 2024.

☐ The parents will not file and are not required to file a 2024 income tax return with the IRS, **AND** understand that they must **ALSO** complete and return a **2026-2027 Parental Non-Filer Form**.

☐ The parents have filed a 2024 income tax return but have **ALSO** filed, or will file, an **AMENDED** 2024 IRS tax return and understand that they must **ALSO** 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:

- Updated 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.

☐ The parents are required to file a 2024 IRS income tax return, and have been granted a **filing extension** by the IRS beyond the automatic six-month extension for tax year 2024, **AND** understand that they must **ALSO** provide the following documentation:

- 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.

☐ The parents have filed a 2024 income tax return.
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.

If 2024 income tax return information for the parents was not available or could not be used, 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.
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- 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.

**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 2024 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 2024 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 2024 income tax return(s).



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**Student's Name:** _____ **Last 4 Digits of Student's SSN:** _____

## E. Identity (To Be Signed at the Institution)

_____ _____ _____

*Receiving School Official's Name* *Signature* *Date*

The student must appear in person at Tulane 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. 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 collect the student's ID.

_____ _____ _____

(Student's Signature) (Date) (Student's ID Number)

El estudiante debe comparecer en persona en Tulane University para verificar su identidad mediante la presentación de una identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros. La institución conservará una copia de la identificación con fotografía del estudiante en la cual se anotará la fecha en la que se recibió y revisó, y el nombre del funcionario de la institución autorizado a recibir y revisar las identificaciones de los estudiantes

**Identity (To Be Signed With Notary):** **ONLY** if the student is **UNABLE** to appear in person at Tulane University 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, 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 (in English or Spanish) 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.

The ID copy (front and back) must be included with the completed Verification Worksheet, and the notary seal must be applied to the copy (front and back) of the ID as well as the Verification Worksheet. The original signed Worksheet (along with the notarized copy of the ID, front and back) must be mailed by post to the University.

**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 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)

**Student's Name:** _____ **Last 4 Digits of Student's SSN:** _____

My commission expires on _____
(Date)



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**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.

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

***You should make a copy of this worksheet for your records.***

_____ _____
Print Student's Name | Student's ID Number

_____ _____
Student's Signature (Required) | Date

_____ _____
Parent's Signature (Required) | Date

*ver. 02/10/2025*

***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.**