

How to Provide Financial Information - Dependent

Per Federal Regulations, this information is required for all individuals on the 2024-2025 FAFSA.

<u>W-2's</u>

Copies of all 2022 W-2's are required for all individuals where the FA-DDX was unsuccessful OR you are a non-filer

- All students and parents who worked and earned income for 2022 who were either non-filers OR were
 unsuccessful using the FA-DDX must provide copies of all 2022 W-2 forms issued to the student/parent and the
 parent's spouse by their employers.
- For those unable to obtain W-2's, you must go to the IRS website (https://irs.gov/individuals/get-transcript/) and obtain a "2022 Wage and Income Transcript" that will be accepted in lieu of missing W-2's.

-AND-

TAX INFORMATION

(Both the student and the parent(s) appearing on the FAFSA must provide one of these documents)

1. Update your 2024-2025 FAFSA using the FA-DDX (Future Act Direct Data Exchange)

Go to <u>studentaid.gov</u>, log into your FAFSA record, select "Make FAFSA Corrections"; make sure that you and your parent(s) identification information is correct and that all contributors have granted consent.
 <u>Please note if the FA-DDX did not work for you, you will be prompted to enter tax information manually and will need to provide another method of tax information to our office for verification.
</u>

*NOTE: The FA-DDX does not transfer all data elements to the FAFSA, therefore you may still be required to provide our office with a copy of your federal tax return (1040, Schedules 1-3, and Schedules C, E, F, K-1 Form 1065, and/or Form 8863) upon request.

2. Provide a signed copy of your 2022 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2022 you may submit a <u>signed copy</u> of your federal (2022) 1040 tax return in lieu of obtaining the Tax Return Transcript. This is to include the federal 1040 (signed),
 Schedules 1-3, Schedule C, E, F, K-1 Form 1065 and/or Form 8863 as applicable.
 - o **NOTE:** The tax filer must provide an (actual) signature where indicated OR have a valid Tax Preparer's ID and EIN listed on your tax return. An electronic (PIN) signature is not acceptable.

3. Provide a 2022 IRS Tax Return Transcript

- To obtain a 2022 IRS Tax Return Transcript, go to https://www.irs.gov/Individuals/Get-Transcript or call 1-800-908-9946. (You will need your SSN, date of birth, and the address used on your 2022 taxes)
- Make sure to request the "**IRS Tax Return Transcript**" and <u>not</u> the "IRS Tax Account Transcript" <u>for the tax year ending December 31, 2022</u>.

NON-TAX FILERS

If the FA-DDX Did Not Transmit Tax Data, Provide a Non-Filing Letter from the IRS as well as copies of all 2022 W-2's (if it did, then you only need to provide earnings information)

- 1. Log onto www.irs.gov/transcript and click on "Request by MAIL" (you may try the "Request Online" option, however, some non-filers have difficulty with this option). Select "Return Transcript", and choose the tax year ending December 31, 2022
 - Download the IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf and follow the instructions on the form.
- 2. All non-tax filers must still provide copies of all 2022 W-2's and provide us information on all sources of income/financial support (see instructions above for W-2 request steps)



2024-2025 Dependent Verification Worksheet

Verification Tracking Group 1 and Institutional Selection

In response to your submission of the 2024-2025 Free Application for Federal Student Aid (FAFSA), the U.S. Department of Education has required the Office of Financial Aid to collect the following information from you. Submission of all of the requested information is required in order to receive federal student aid. Please complete and return these materials to the Office of Financial Aid as quickly as possible.

	Student's First Name	Student's M.I.	Student's SU ID Number		
Student's Street Address (include apt. no.)			Student's Date of Birth		
city	State	Zip Code	Student's Email Address		
for my par	ent's 2022 tax year correctly re		by the FA-DDX (Future Act Direct Data Exchang (Please complete the chart below to also indicate the		
number in	college for our records.)		(Please complete the chart below to also indicate the control of t		
informatio	n is provided in the chart belov	v. This is because:			

- Vourself
- Your parent(s) (including step-parent) who provide more than 50% of your support
- Your parent(s)' other dependents children if (a) your parent(s) will provide more than half of their support from July 1, 2024, through June 30, 2025, or (b) the children would be required to provide parental information when completing the FAFSA excluding unborn children.
- Other people if they now live in your parent(s) household and your parent(s) provide more than half of their support and will continue to provide more than half of their support from July 1, 2024, through June 30, 2025
- For all family members, please also list those who will be enrolled *at least half-time* in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2024 and June 30, 2025.
- If more space is needed, attach a separate page with the student's name and SU ID Number at the top.

*NOTE: Please do not list parental college information below, as it will be disregarded for financial aid purposes.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half- Time
John Doe (example)	18	Brother	Example University	Yes
		Self	Shenandoah University	

udent's Name:		SU ID:		
STUDENT INCOME INFORMATION				
Check the applicable boxes below then submit the corresponding documents requested.	Submit the following documents			
☐ I have filed or will file a 2022 Federal Income Tax Return and submit the information by using the: ☐ FAFSA FA-DDX ☐ 2022 Tax Return Trans ☐ Signed copy of (2022) 1040 tax return		 - Update your FAFSA using the FA-DDX - Provide a 2022 Tax Return Transcript - Provide a signed copy of your (2022) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, F, K-1 (Form 1065), and/or Form 8863 		
		AND all 2022 W-2's if the F	A-DDX was unsuccessful	
I did not work and am not required to file a 2022 Federal Inco	No documentation required.			
☐ I received income but am not required to file a 2022 Federal	Income	Tax Return.		
The student received earnings and/or financial support in 2022. Lis income, the amount earned from each employer in 2022, and whe financial support even if they did not issue a W-2. Provide copies of more space is needed, provide a separate page	ether an of all 202	IRS W-2 form is provided – lis 2 IRS W-2 forms issued to the	st every employer or source of e student by their employers. If	
Income Source OR Employer's Name		ual Amount Earned in 2022	IRS W-2 Provided?	
EXAMPLE: Mary's Bakery and Café		\$2,000	Yes	
Total Amount of Income Earned From Work in 2022	¢			
	\$			
PARENT INCOME INFORMATION				
Check the applicable boxes below then submit the corresponding documents requested.	ng	Submit the fo	llowing documents	
☐ I have filed or will file a 2022 Federal Income Tax Return ar submit the information by using the: ☐ FAFSA FA-DDX ☐ 2022 Tax Return Trans ☐ Signed copy of (2022) 1040 tax return		 - Update your FAFSA using the FA-DDX - Provide a 2022 Tax Return Transcript - Provide a signed copy of your (2022) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedule C, E, F, K-1 (Form 1065), and/or Form 8863 		
		AND all 2022 W-2's if the FA-DDX was unsuccessful		
☐ I did not work and am not required to file a 2022 Federal Inco Tax Return.	I did not work and am not required to file a 2022 Federal Income Tax Return.			
I received income am not required to file a 2022 Federal Inco IRS or have a successful FA-DDX transmission. **	ome Tax	Return. You must provid	e a non-filing letter from the	
One or both parents received earnings and/or financial support in 2 of this income, the amount earned from each source in 2022, and w financial support even if they did not issue a W-2. Provide copies of more space is needed, provide a separate page	hether a f all 2022 with the	n IRS W-2 form is provided – 2 IRS W-2 forms issued to the student's name and ID numb	list every employer or source of parent(s) by their employers. It	
Income Source OR Employer's Name EXAMPLE: Tom's Tree Removal Services	Annı	ual Amount Earned in 2022 \$8,500	IRS W-2 Provided? Yes	
Zamini Zamini a maritamatan sarrisaa		\$ 0,000	, 55	
Total Amount of Financial Support Received in 2022	\$			
			to dia accomplete and accounts	
Certification and Signature: Each person signing this worksheet	certifies	trial all of the information repor	WARNING: If you purposely give false or	
Student Signature - <i>required</i>	tudent Signature - <i>required</i>		misleading information this worksheet, you may	
Parent Signature - <i>required</i>		Date	fined, be sentenced to jate or both.	