

## **How to Provide Financial Information - Independent**

Per Federal Regulations, this information is required for all individuals on the 2025-2026 FAFSA.

# W-2's

# Copies of all 2023 W-2's are required for all individuals where the FA-DDX was unsuccessful OR you are a non-filer

- All students (and their spouses) who worked and earned income for 2023 who were either non-filers OR were
  unsuccessful using the FA-DDX must provide copies of all 2023 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 (<a href="https://irs.gov/individuals/get-transcript/">https://irs.gov/individuals/get-transcript/</a>) and obtain a "2023 Wage and Income Transcript" that will be accepted in lieu of missing W-2's.

# -AND-

### **TAX INFORMATION**

(Both the student and the spouse appearing on the FAFSA must provide **one** of these documents)

#### 1. Update your 2025-2026 FAFSA using the FA-DDX (Future Act Direct Data Exchange)

• Go to <a href="studentaid.gov">studentaid.gov</a>, log into your FAFSA record, select "Make FAFSA Corrections;" make sure that you and your spouse's identification information is correct and that all contributors have granted consent. <a href="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."

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\*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, F, and/or Form 8863) upon request.

### 2. Provide a signed copy of your 2023 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2022 you may submit a <u>signed copy</u> of your federal (2023) 1040 tax return in lieu of obtaining the Tax Return Transcript. This is to include the federal 1040 (signed), Schedules 1, 3, Schedule C, F, and/or Form 8863 as applicable.
  - 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 2023 IRS Tax Return Transcript

- To obtain a 2023 IRS Tax Return Transcript, go to <a href="https://www.irs.gov/Individuals/Get-Transcript">https://www.irs.gov/Individuals/Get-Transcript</a> or call 1-800-908-9946. (You will need your SSN, date of birth, and the address used on your 2023 taxes)
- Make sure to request the "IRS Tax Return Transcript" and <u>not</u> the "IRS Tax Account Transcript" for the tax year ending December 31, 2023.

# 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 2023 W-2's

- Log onto <u>www.irs.gov/transcript</u> 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, 2023.
   OR
  - Download the IRS Form 4506-T at <a href="https://www.irs.gov/pub/irs-pdf/f4506t.pdf">www.irs.gov/pub/irs-pdf/f4506t.pdf</a> and follow the instructions on the form.
- 1. All non-tax filers must still provide copies of all 2023 W-2's and provide us information on all sources of income/financial support (see instructions above for W-2 request steps)



# 2025 - 2026 Independent Verification Worksheet

Verification Tracking Group 1 and Institutional Selection

In response to your submission of the 2025-2026 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.

le apt. no.)		_	
		Student's Date of Birth	
State	Zip Code	Student's Email Address	
2023 tax year correctly re			
s box I indicate that the FA		2023 needs adjustments and my corre	cted family
	s box I indicate that my fan 2 2023 tax year correctly rege for our records.)	s box I indicate that my family size as transferred 2023 tax year correctly reflects my family's size (ge for our records.)	s box I indicate that my family size as transferred by the FA-DDX (Future Act Direct Data 2023 tax year correctly reflects my family's size (Please complete the chart below to also ge for our records.)  s box I indicate that the FA-DDX information from 2023 needs adjustments and my corrections.

- Yourself
- Your spouse, if you are married
- Your children (if any) if you will provide more than half of their support from July 1, 2025, through June 30, 2026, or if the child would be required to provide your information when completing the FAFSA for 2025-2026. Include children who meet either of these criteria, even if they do not live with you excluding unborn children.
- Other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2025, through June 30, 2026.
- 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, 2025 and June 30, 2026.
- If more space is needed, attach a separate page with the student's name and SU ID Number at the top

Full Name	Age	Relationship	College	Will be Enrolled at Least Half- Time
Elizabeth Jones (Example)	3	Child	N/A	No
		Self	Shenandoah University	

I have filed or will file a 2023 Federal Income Tax Return and submit the information by using the:   FAFSA FA-DDX	Check the boxes below then submit the corresponding document	s		
Information by using the:    FAFSA FA-DDX	•		Submit the fo	ollowing documents
The student received earnings and/or financial support in 2023. List below the names of all income sources including the sour income, the amount earned from each source in 2023, and whether an IRS W-2 form was provided or not. Provide copies of forms issued to the student by their employers. If more space is needed, provide a separate page with the student's name number at the top.    Income Source OR Employer's Name	information by using the:  ☐ FAFSA FA-DDX ☐ 2023 Tax Return Transcript		<ul> <li>- Provide a 2023 Tax Return Transcript</li> <li>- Provide a signed copy of your (2023) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedule C, E, F, K-1 (Form 1065), and/or Form 8863 as</li> </ul>	
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Total Amount of Financial Support Received in 2023 \$  Total Amount of Financial Support Received in 2023 \$  Total Amount of Financial Support Received in 2023 \$  To check if the FA-DDX worked for you, please confirm that you have granted consent and if it asked indicate that you did not file manually. If you had to answer that you did not file manually, you will need to request a letter of non-filing.  To request this letter, log onto <a href="https://www.irs.gov/transcript">www.irs.gov/transcript</a> and click on "Get Transcript by MAIL". The individed be instructed to enter their social security number, date of birth, street address, and zip code. After that is complete, they will be given different options for ordering a transcript. Select "Return Transcript", and choost the tax year ending December 31, 2023. (You may also request to download this electronically from https://irs.gov/individuals/get-transcript but some students have trouble with this option.)  Download the IRS Form 4506-T at <a href="https://www.irs.gov/pub/irs-pdf/f4506t.pdf">www.irs.gov/pub/irs-pdf/f4506t.pdf</a> and follow the instructions on the form is leading information on this work you may be fined, be sentenced to jaboth.	income, the amount earned from each source in 2023, and whethe forms issued to the student by their employers. If more space is a	r an IRS W-2 leeded, provi	form was provided or	not. Provide copies of all W-2
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Student's Name:\_\_\_\_\_SU ID: \_\_\_\_\_