How to Provide Financial Information - Independent

Per Federal Regulations, this information is required for all individuals on the 2027-2028 FAFSA.

W-2's

Copies of all 2025 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 2025 who were either non-filers OR were unsuccessful using the FA-DDX must provide copies of all 2025 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 "2025 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 2027-2028 FAFSA using the FA-DDX (Future Act Direct Data Exchange)

- Go to studentaid.gov, 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. *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.*

***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 2025 (1040) Tax Return

- Per Federal Guidance beginning 1/9/2022 you may submit a **signed copy** of your federal (2025) 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 2025 IRS Tax Return Transcript

- To obtain a 2025 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 2025 taxes)*
- Make sure to request the **"IRS Tax Return Transcript"** and ***not*** the "IRS Tax Account Transcript" for the tax year ending December 31, 2025.

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 2025 W-2's

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, 2025.
   OR
   Download the IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf and follow the instructions on the form.
1. *All non-tax filers must still provide copies of all 2025 W-2's and provide us information on all sources of income/financial support (see instructions above for W-2 request steps)*

SHENANDOAH® UNIVERSITY

2027 - 2028 Independent Verification Worksheet

Verification Tracking Group 1 and Institutional Selection

In response to your submission of the 2027-2028 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.

A. Student's Information

Student's Last Name _____ 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 _____

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

B. Family Information

☐ **By checking this box I indicate that my family size as transferred by the FA-DDX (Future Act Direct Data Exchange) for my parent's 2025 tax year correctly reflects my family's size** *(Please complete the chart below to also indicate the number in college for our records.)*

☐ **By checking this box I indicate that the FA-DDX information from 2025 needs adjustments and my corrected family information is provided in the chart below. This is because:**

_____

_____

_____

Please provide the following information:

- Yourself
- Your spouse, if you are married
- Your children *(if any)* if you will provide more than half of their support from July 1, 2027, through June 30, 2028, or if the child would be required to provide your information when completing the FAFSA for 2027-2028. 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, 2027, through June 30, 2028.
- 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, 2027 and June 30, 2028.
- *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**	

Student's Name:_____ **SU ID:** _____

C. Student Income Information

Check the boxes below then submit the corresponding documents requested.	Submit the following documents
☐ I have filed or will file a 2025 Federal Income Tax Return and submit the information by using the: ☐ FAFSA FA-DDX ☐ 2025 Tax Return Transcript ☐ **Signed** copy of (2025) 1040 tax return	Update your FAFSA using the FA-DDX - Provide a 2025 Tax Return Transcript - Provide a **signed copy** of your (2025) 1040 tax return including the 1040 pages, Schedules 1-3, and Schedules C, E, F, K-1 (Form 1065), and/or Form 8863 as applicable **AND** all 2025 W-2's if the FA-DDX was unsuccessful
☐ I did not work and am not required to file a 2025 Federal Income Tax Return.	Non-Filing letter from the IRS or successful FA-DDX transmission **(see instructions on first page)**

☐ I worked but am not required to file a 2025 Federal Income Tax Return.

The student received earnings and/or financial support in 2025. List below the names of all income sources including the source of this income, the amount earned from each source in 2025, and whether an IRS W-2 form was provided or not. Provide copies of all W-2 forms issued to the student by their employers. If more space is needed, provide a separate page with the student's name and ID number at the top.

Income Source OR Employer's Name	Annual Amount Earned in 2025	IRS W-2 Provided?
EXAMPLE: Sarah's Wild Designs, Inc. *Shoveled Jared's Driveway*	*$823* *$125*	*Yes* *No*
Total Amount of Financial Support Received in 2025	$	

***Non-Tax Filers: You must obtain the Non-Filing Letter from the IRS or have successfully used the FA-DDX to confirm your non-filing status by granting consent.**

- **To check if the FA-DDX worked for you**, please confirm that you have granted consent and if it asked you to 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 www.irs.gov/transcript and click on "Get Transcript by MAIL". The individual will 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 choose the tax year ending December 31, 2025. (You may also request to download this electronically from https://irs.gov/individuals/get-transcript but some students have trouble with this option.)

OR

- Download the IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf and follow the instructions on the form.

D. Certification and Signature

By signing this form, I certify that all information reported is complete and accurate.

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

_____ _____

Student Signature - ***required*** Date