NKU NORTHERN KENTUCKY UNIVERSITY

2024-2025
VERIFICATION WORKSHEET

Office of Student Financial Assistance
AC 416 Nunn Drive
Highland Heights, KY 41099 V5

I. Student Information

Name: _____

NKU ID/SSN: _____   Date of Birth: _____

Address: _____   City: _____

State: _____   Zip: _____   Phone No.: _____

II. Family Information

Check one:

☐ **Dependent Student:**
Includes the following:
- The student/Yourself
- The parents (including step-parent) *
- The parents' other dependent children**
- Other people***

☐ **Independent Student**:
Includes the following:
- The student/Yourself
- Your spouse, if married
- Your dependent children**
- Other people***

* 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 parent's other dependent children/your dependent children if the following are true:
  o They live with the student's parents/student (or live apart because of college enrollment),
  o They receive more than half of their support from the student's parents/student, and
  o They will continue to receive more than half their support from the student's parents/student during the award year.

***Other people if the following are true:
  o They live with the parent/student;
  o They receive more than half of their support from the parent/student; and
  o They will continue to receive more than half their support from the parent/student during the award year.

The provided criteria for "dependent children" or "other people" align with the requirement that family size align with whom the parent/student could claim as a dependent on a U.S. tax return if the parent/student were to file a U.S tax return at the time of completing the 2024-2025 FAFSA. As a result, the parent/student should not include any unborn children in the family size.

To complete the verification process, all fields below are required for each member of the household. If more space is needed, provide a separate page with the student's name and Student ID number at the top and attach it to this worksheet.

Full Name	Age	Relationship to Student
Student name:		Self

Instructions for Section III (Parent Tax Information) and Section IV (Student Tax Information):

Tax Filers:
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 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the parents/student filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, parents/student 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/student 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 parent/student (or spouse, if applicable) was not available or could not be used, the parent/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.
> • 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.

Non-Tax Filers:
Non-tax filers **must provide** a confirmation of non-filing from the IRS dated on or after October 1, 2023. A confirmation of non-filing can be obtained from www.IRS.gov/transcript and click on "Get Transcript ONLINE" or by mailing in Form 4506-T and checking box 7.
> o   Dependent students are <u>NOT</u> required to provide a confirmation of non-filing from the IRS if they did not file in 2022.

III. Parent Tax Information (for dependent students)

Tax Filers: <u>Complete this section only</u> if the parents **filed or will file** a **2022** IRS income tax return(s).

Check the box that applies:

☐   The parents <u>succesfully transferred income and tax information</u> directly from the IRS.

☐   The parents <u>unsuccesfully transferred income and tax information</u> directly from the IRS, and instead will provide the school with a **2022** IRS Tax Return Transcript(s) from www.IRS.gov/transcript.

If the parents filed an Amended IRS Income Tax Return for tax year **2022**, you must provide a **2022** IRS Tax Return Transcript and a signed copy of the **2022** IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Non-Tax Filers: <u>Complete this section only</u> if the parent(s) **did not file in 2022 and are not required to file** a **2022** income tax return with the IRS.

Check the box that applies:

☐ Neither parent was employed, and neither had income earned from work in **2022**.

☐ One or both parents were employed in **2022** and have listed below the names of all employers, the amount earned from each employer in **2022**, and whether an IRS W-2 form is provided. [Provide copies of all **2022** IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W-2 provided to NKU? (circle one)	Annual Amount Earned in **2022**
	YES-enclosed NO-but will provide	
	YES-enclosed NO-but will provide	

IV. Student Tax Information

Tax Filers: <u>Complete this section only</u> if the student (and spouse, if the student is married) **<u>filed or will file</u>** a **2022** IRS income tax return(s).

Check the box that applies:

☐   The student <u>succesfully transferred income and tax information</u> directly from the IRS.

☐   The student <u>unsuccesfully transferred income and tax information</u> directly from the IRS, and instead will provide the school with a **2022** IRS Tax Return Transcript(s) from www.IRS.gov/transcript.

If the student and/or spouse filed an Amended IRS Income Tax Return for tax year **2022**, you must provide a **2022** IRS Tax Return Transcript and a signed copy of the **2022** IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Non-Tax Filers: <u>Complete this section only</u> if the student (and spouse, if the student is married) **<u>did not file and are not required to file</u>** a **2022** income tax return with the IRS.

Check the box that applies:

☐   The student and/or spouse were not employed, and had no income earned from work in **2022**.

☐   The student and/or spouse were employed in **2022** and have listed below the names of all employers, the amount earned from each employer in **2022**, and whether an IRS W-2 form is provided. [Provide copies of all **2022** IRS W-2 forms issued to the student and/or spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Employer's Name	IRS W-2 provided to NKU? (circle one)	Annual Amount Earned in **2022**
	YES-enclosed NO-but will provide	
	YES-enclosed NO-but will provide	

V. Statement of Educational Purpose

For this section, the student **MUST** appear in person at Northern Kentucky University Office of Student Financial Assistance 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 receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below

I certify that I, _____, am the individual signing this Statement of Education Purpose and that the Federal student
            (Print Student's Name)
financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Northern Kentucky University for 2024–2025.

STUDENT SIGNATURE: _____   Date_____

FINANCIAL AID ADMINISTRATOR: _____   Date_____
(Financial Aid Administrators, please attach a dated/initialed copy of the student's government-issued photo identification.)

VI. Sign this Worksheet

The Law states your school must review the requested information under the financial aid program rules *(CFR Title 34, Part 668)* and make corrections if necessary. If we have reason to believe the information provided is inaccurate or needs further explanation, we may ask for additional documentation. By signing this worksheet, I/we certify that all of the information reported to qualify for federal student aid is complete and correct. The parent must also sign if the student is dependent. **WARNING: If you purposefully give misleading or false information you may be fined, sentenced to jail, or both. (Signatures must be handwritten)**

STUDENT: _____ DATE:_____
(Required)

PARENT: _____ DATE:_____
(Required for dependent students)

Please submit the original forms by mail to NKU, AC 416, Highland Heights, KY 41099 or in person at AC 301.