

# 2026-2027 Verification Worksheet

## Federal Student Aid Programs

Your application was selected for review in a process called Verification. During this process, St. Joseph's University will be comparing information from your FAFSA application with copies of your and/or your spouse's 2024 Federal tax transcripts, W-2 forms, and possibly other necessary financial documents. The law specifies we reserve the right to request this information before awarding any Federal or Institutional funds. If there are any discrepancies found between your FAFSA application information and your financial documents, your FAFSA may need to be corrected.

Submit this information to the Office of Financial Aid **immediately**, as we will not typically award Federal and/or institutional awards until this process is complete. Failure to complete verification in a timely manner may lead to cancellation of aid. Should additional information be required, the Office of Financial Aid will contact you. You will be notified if FAFSA corrections result in changes/cancellation of award(s).

**Important Note:** The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2025.

**Instructions:** Complete this section if the student and spouse filed or will file a 2024 IRS income tax return(s). As part of the 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 the 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](http://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](http://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.
- Parent Non Tax Filers must submit 2024 IRS Verification of Non-filing letter to the Office of Financial Aid. If you have never filed a tax return in any year, please use the third option, completing IRS form 4506T-EZ. When submitting verification of non-filing letter be sure to write student ID# on letter and indicate that it is for the parent.
  - **You can obtain the 2024 IRS Verification of Non-filing letter by either: going to [www.irs.gov](http://www.irs.gov).** Click "Get Transcript Online" then select "Verification of Non-filing letter", by calling 1-800-908-9946, or by completing IRS form 4506T-EZ. The form can be downloaded at: <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>

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## Federal Student Aid Programs

### A. Student Information

Last Name	First Name	M.I.	Student ID or SSN
Address (include Apt. #)			Date of Birth
City	State	Zip Code	Phone Number (Include Area Code)

### B. Family Information

**In the space(s) below, please include the following:**

- The student
- The student’s spouse, if applicable
- The student’s dependent children if the following are true:
  - They live with the student (or live apart because of college enrollment)
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
  - They live with the student
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half their support from the student 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 student 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

**C. Student’s Income Information to Be Verified:**

Have you or will you be required to file a 2024 U.S. Federal Tax Return?

- Yes: Skip to Section D
  - We will still need to verify your income. This can be done by either utilizing the Direct Data Exchange (DDX) on the FAFSA, by submitting a signed copy of your 2024 Federal Income taxes including schedules 1, 2 and 3(if applicable), or by submitting a copy of your Tax Return Transcript. See page 1 of this form for instructions on how to obtain a Tax Return Transcript.
- No: Complete this section if the student will not file and is not required to file a 2024 income tax return with the IRS. Student will need to complete a separate non-filing statement (available on the SJNY website and portal) and submit it to the Office of Financial Aid.

Check the one box that applies:

- The student was not employed and had no income earned from work in 2024
- The student was employed in 2024. Please complete the table below and attach copies of all 2024 IRS W-2 forms issued to the student by the employers. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name and SJNY student ID number at the top.

Employer’s Name	Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

Complete a Student Non Tax Filer Form indicating that the student did not, and was not required to file a 2024 federal tax return.

Please select one:

- 
- Check here if a Student Non Tax Filer form is provided
  - Check here if a Student Non Tax Filer form will be provided later.
-

**D. Spouse’s Income Information to Be Verified:**

Note: If the student is married, this section is to be completed by the student’s spouse.

\*Notify the financial aid office if the student or spouse filed separate 2024 IRS income tax returns or had a change in marital status after December 31, 2024.

Have you or will you be required to file a 2024 U.S. Federal Tax Return?

- Yes: Skip to Section E
  - o We will still need to verify your income. This can be done by either utilizing the Direct Data Exchange (DDX) on the FAFSA, by submitting a signed copy of your 2024 Federal Income taxes including schedules 1, 2 and 3(if applicable), or by submitting a copy of your Tax Return Transcript. See page 1 of this form for instructions on how to obtain a Tax Return Transcript.
- No: Complete this section if the spouse will not file and is not required to file a 2024 income tax return with the IRS. Confirmation of non-filing is REQUIRED for the IRS. Form 4506-T must be completed and mailed to the IRS with Box 7 marked. The response must be submitted to SJNY Financial Aid Office.

Check the box that applies:

- The student’s spouse was not employed and had no income from work 2024.
- The student’s spouse was employed in 2024. Please complete the table below and attach copies of all 2024 IRS W-2 forms issues to the spouse by the employer(s). List every employer even if an IRS W-2 form was not issued.

Employer’s Name	Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

**Please select one:**

- Check here if confirmation of non-filing is provided.
- Check here if confirmation of non-filing will be provided later.

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**E. Sign this Worksheet**

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent must sign and date.

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

\_\_\_\_\_  
**Print Student's Name**

\_\_\_\_\_  
**Student's ID Number**

\_\_\_\_\_  
**Student's Signature (Required)**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Spouse's Signature (Optional)**

\_\_\_\_\_  
**Date**

**Return the completed worksheet to the campus you attend:  
St. Joseph's University Attn: Office of Financial Aid**

Long Island and Online Campuses  
155 West Roe Boulevard  
Patchogue, NY 11772  
FAX: 631-650-2525  
PHONE: 631-687-2600

Brooklyn Campus  
245 Clinton Avenue  
Brooklyn, NY 11205  
FAX: 718-940-5312  
PHONE: 718-940-5700