Westminster College
2025-2026 Verification Worksheet (V1)
Independent Student

Your 2025-2026 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification". The Financial Aid Office at Westminster College must compare information from your FAFSA with the information you provide on this worksheet and with any other required documents. If there are differences, your Financial Aid Office could require additional documentation and your FAFSA information may need to be corrected. You will not receive federal financial aid until all verification requirements are met and the necessary corrections made.

A. Student's Information

Student's Last Name First Name M.I.	Student's ID#
Student's Street Address (include apt. number)	Student's Date of Birth
City, State, Zip Code	Student's Phone Number (include area code)
Student's Email Address	Alternative Phone Number (include area code)

B. Family Size Information

List the people you will support between July 1, 2025 and June 30, 2026. Family size includes 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 student 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 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size.

Write the name of the college below for any household member, who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2025 and June 30, 2026.

Student Name: _____ Student ID#: _____

If more space is required, attach a separate page with the student's name and ID# at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time? (Circle Yes or No)
Example: Jane Smith	***23***	***Sister***	***State University***	***(Yes)*** ***No***
		Self	Westminster College	**Yes** **No**
				Yes **No**
				Yes **No**
				Yes **No**
				Yes **No**
				Yes **No**

Note: We may require additional documentation if we have reason to believe that the information regarding the family members enrolled in eligible postsecondary educational institutions is inaccurate.

C. Student (and Spouse) Income Information to Be Verified

NOTE: Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023. If you filed an amended 2023 IRS tax return, you may be required to submit additional documentation.

Check the box that applies:

☐ My (or my spouse) 2023 income tax return was used and successfully imported into the FAFSA. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS. ***[Skip to Section D]***

☐ My (or my spouse) 2023 income tax return was unavailable or could not be used, and instead will provide the institution with a **2023 IRS Tax Return Transcript(s)** or a *signed* copy of the **2023 Federal Income Tax Return and applicable schedules**. ***[Skip to Section D]***

☐ I (or my spouse) was not employed and had no income earned from work in 2023. **[*Go to Non-tax Filers section, page 3]***

☐ I (or my spouse) was employed in 2023 but was not required to file an income tax return. I have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. **[*Go to Non-tax Filers section, page 3]***

If more space is required, attach a separate page with the student's name and ID# at the top.

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2023
Example: ABC Company	***Yes***	***$4,500.00***
Total Amount of Income Earned from Work		**$**

Student Name: _____ Student ID#: _____

Section C. continued…

For Student Non-tax Filers

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

____ Check here if non-filing statement is signed and dated.
____ Check here if non-filing statement will be provided later.

D. Certification and Signatures – Student MUST sign.

I/We certify that all the information reported on this worksheet is complete and correct. I/We understand that if we purposely give false or misleading information, we could be fined, jailed, or both.

Student's Signature (Required)	Date
Student's Spouse Signature (Optional)	Date

IMPORTANT: Verification cannot be completed until ALL required documents are received.

- **Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the Financial Aid Office at Westminster College.**
- **If you have any questions concerning the required documentation requested with this worksheet, please email finaid@westminster.edu.**
- **You should make a copy of this worksheet, and all submitted documents for your records.**

This verification worksheet is required to be printed and signed.

If you are unable to or don't have access to a printer, please contact our office at 724-946-7102 and we will be happy to mail you the documents needed.

RETURN COMPLETED FORM, PAGES 1-3, AND ANY REQUIRED DOCUMENTS TO:

WESTMINSTER COLLEGE
FINANCIAL AID OFFICE
319 SOUTH MARKET STREET
NEW WILMINGTON, PA 16172

Student Name: _____ Student ID#: _____

INSTRUCTIONS: Verifying Tax Information

RECOMMENDED for tax filers: Import 2023 tax income information to the FAFSA:

1) As part of federal student aid eligibility, students and parents 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.

2) In other words, if the parents filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS.

Request an IRS Transcript of Your Tax Return (TRT) or an IRS Statement of Non-filing:

A 2023 IRS Tax Return Transcript may be obtained through:

3) 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.

4) 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 is displayed online upon successful completion of the IRS's two-step authentication.

5) PHONE – Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

6) PAPER REQUEST – Complete 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.

Additional Tax Information

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax related identity theft, and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Student Name: _____ Student ID#: _____

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023, must provide:

- A signed statement listing the sources of any 2023 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2023; **and**
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2023.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2023 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.