

Your FAFSA has been selected by the U.S. Department of Education for a process called Verification. We must compare the information from your FAFSA with the information on this worksheet and any other required documents. If there are differences, we will make the necessary corrections to your FAFSA or contact you for further information.

Student Information

First Name	M.I.	Last Name	Date of Birth
Street Address (not campus address)			Email Address
City	State	Zip Code	Phone Number

Family Household Information

List all the people in your household. INCLUDE:

- Yourself, and your spouse if married.
- Your or your spouse’s children **IF** you or your spouse will provide more than half of the children’s support from July 1, 2025 through June 30, 2026, even if a child does not live with you.
- Other people if they now live with you **AND** you or your spouse provides 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.

WRITE THE NAME OF ALL HOUSEHOLD MEMBERS BELOW, along with their age and relationship to the student.

The provided criteria for “dependent children” or “other persons” mirror the requirement that family size align with those 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. If more space is needed, provide a separate page with the student’s name and ID number at the top.

First and Last Name of Each Household Member	Age	Relationship to Student
		<i>Self</i>

How to Provide Tax Data to the Financial Aid Office

Use one of the following methods to provide your 2023 tax information to the Financial Aid Office. Tax information is **REQUIRED** for the student and spouse (if the student is married), and for the student if the student filed a tax return. Indicate which method(s) were used on the next page.

- 1. Provide Consent and Approval in FAFSA:** *preferred method*

If you and possibly your spouse, didn’t provide proper [consent and approval to retrieve IRS tax information](#) via the FA-DDX when the 2025-2026 FAFSA was first submitted, login to the student’s processed FAFSA to make corrections using this [video](#) for help. FAFSA updates should be received by the Financial Aid Office within 2-3 business days. 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 via the FA-DDX.
- 2. Request a 2023 Tax Return Transcript from the IRS:**

If 2023 income tax return information for you or spouse if married was not transferred via the FA-DDX and considered verified, a **2023 IRS Tax Return Transcript(s)** is required. A Tax Return Transcript is an official record of the information on your federal tax return. Transcripts can be requested for free online at www.irs.gov under “Get Your Tax Record” or by calling 1-800-908-9946. Be sure to order a tax “return transcript”, **not** an account transcript. Transcripts must be requested using the SSN, date of birth, and address for the primary taxpayer (the taxpayer whose name is listed first on the federal tax return). You can opt for your tax return transcript to be mailed to you, then you send into school, or you can get your tax return transcript online using the [ID.me IRS Help Site](#).

3. Provide a copy of your entire 2023 Federal Tax Return:

Provide a copy of your complete, signed 2023 Federal Tax Return, including all pages, schedules, forms, and all W-2s.

4. Request a Verification of Non-filing letter from the IRS:

If the student or spouse did not file a tax return in 2023, you are required to provide Verification of Non-filing. A Verification of Non-filing letter can be requested for free online at www.irs.gov under "Get Your Tax Record" or by mail using IRS Form 4506-T and checking box 7.

STUDENT Tax Data and Income Information (check one box)

- Check here if the student used method **1**: Provided proper [consent and approval to retrieve IRS tax information](#) via the FAFSA for 2023 income information into the FAFSA and did not make changes to the FAFSA When submitting. *(Not available if married filing separately.)*
- Check here if the student used method **2**: You have attached a copy of your complete 2023 IRS Tax Return Transcript. **Write the student’s name on the top of the transcript.**
- Check here if the student used method **3**: You have attached a **signed** copy of your entire 2023 Federal Tax Return, including all pages, schedules, forms, and all W-2s.
- Check here if the student used method **4**: You did not file and are not required to file a 2023 Federal Tax Return. If you had earned income in 2023, list your employer(s) and any earnings received in 2023 in the table below. **Attach a copy of your W-2 form from each employer.** If the student had no earned income in 2023, write NONE. **You must also submit a Verification of Non-filing letter from the IRS.**

Employer’s Name	2023 Amount Earned	W-2 Attached?

***If Married and Filed Separately:* SPOUSE Tax Data and Income Information** (check one box)

- Check here if this section does not apply to you.
- Check here if the spouse used method **2**: You have attached a copy of your complete 2023 IRS Tax Return Transcript. **Write both the student’s name and spouse’s name on the top of the transcript.**
- Check here if the spouse used method **3**: You have attached a **signed** copy of your entire 2023 Federal Tax Return, including all pages, schedules, forms, and all W-2s.
- Check here if the spouse used method **4**: You did not file and are not required to file a 2023 Federal Tax Return. If you had earned income in 2023, list your employer(s) and any earnings received in 2023 in the table below. **Attach a copy of your W-2 form from each employer.** If the spouse had no earned income in 2023, write NONE. **You must also submit a Verification of Non-filing letter from the IRS.**

Employer’s Name	2023 Amount Earned	W-2 Attached?

Sign the Worksheet

Each person signing below certifies that all of the information reported is complete and correct. The student is required to sign; spouse signature is optional.

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

Student Signature **REQUIRED**

Date

Spouse Signature

Date

Return to: **Minneapolis:** Saint Mary’s University, Financial Aid Office, 2500 Park Avenue, Minneapolis, MN 55404
Winona: Saint Mary’s University, Financial Aid Office, 700 Terrace Heights #5, Winona, MN 55987
Email: financialaid@smumn.edu **Fax:** 507-457-6997