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Office of Student Financial Services  
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Office of Student Financial Services  
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## 2025-26 AGGREGATE VERIFICATION WORKSHEET GROUP (V5) IN-PERSON DEPENDENT

Your Free Application for Federal Student Aid (FAFSA) was selected by the Federal Department of Education for review in a process called "Verification". In this process, the Office of Student Financial Services will compare information from your FAFSA with this worksheet and other required documents. The Verification must be finalized prior to the distribution of federal aid. If inconsistencies are found between your FAFSA, verification worksheet, and other documentation, the Office of Student Financial Services may electronically amend the necessary changes.

- Complete this section if you and/or your parent(s) **filed or will file** a 2023 Federal Income Tax return(s). As part of the federal student aid eligibility, your 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. In other words, if your parents filed separate 2023 Federal 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 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.
- If 2023 Federal Income Tax return information for your parents(s) was not available or could not be used, you must 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**.

A 2023 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail or Online**—Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail or Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript."
- 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.

- You and at least one parent must sign this worksheet.
- Submit the completed and signed Verification Worksheet with the required documentation to the Office of Student Financial Services.

### A. STUDENT INFORMATION (Please Print)

Last Name	First Name	Monroe University ID Number		
Address (include Apt. #)	City	State	Zip Code	Date of Birth (MM/DD/YYYY) / /
Cell Phone # ( )	Home Phone # ( )	Personal E-Mail		

### B. FAMILY SIZE INFORMATION (if more space is required, attach a separate page)

#### FAMILY SIZE DEFINITION

Complete the chart below with whom the parent could claim as a dependent on U.S. tax return. Use the information below to determine who should be included in the family size. Family Size includes the following:

- The student
- The student's parents, even if the student is not living with them. 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 student's siblings if the following are true:  
They live with the student's parents (or live apart because of college enrollment); they received more than half of their support from the student's parents, and they will continue to receive more than half their support from the student's parents during the award year.
- Other persons if the following are true: They live with the student's parents; they received more than half of their support from the student's parents, and they will continue to receive more than half their support from the student's parents 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 your parent were to file a U.S. tax return at the time of completing the 2025-2026 FAFSA. As a result, the parent should not include any unborn children in the family size.

FULL NAME	AGE	RELATIONSHIP TO STUDENT
		SELF

### C. TAX FILERS – PARENT AND STUDENT

Check the appropriate boxes below and provide the requested information and/or documents:

PARENT'S (AND SPOUSE, IF MARRIED) INCOME INFORMATION	STUDENT'S INCOME INFORMATION
<input type="checkbox"/> I/we gave consent and approve sharing and importing 2023 Federal Income and Tax information from the IRS to my FAFSA form.	<input type="checkbox"/> I gave consent and approve sharing and importing 2023 Federal Income and Tax information from the IRS to my FAFSA form.
<input type="checkbox"/> I/we did not (or could not) import 2023 Federal Income and Tax information from the IRS to my FAFSA form. Therefore, I/we have attached my/our 2023 IRS Tax Transcript(s) or a signed copy of my/our 2023 Federal Income Tax return and applicable schedules.	<input type="checkbox"/> I did not (or could not) import 2023 Federal Income and Tax information from the IRS to my FAFSA form. Therefore, I/we have attached my/our 2023 IRS Tax Transcript(s) or a signed copy of my/our 2023 Federal Income Tax return and applicable schedules.

### D. PARENT(S)' NON-TAX FILERS

Check the appropriate box below and provide the requested information and/or documents:

- a. ☐ I/we was/were not employed, and had no income earned from work in 2023. Therefore, was/were not required to file a 2023 Federal Income Tax Return.
- b. ☐ I/we was/were employed and had income from work in 2023 but was/were not required to file a 2023 Federal Income Tax Return.
- Complete the chart below by listing each employer(s) and the amount that was earned in 2023 (list every employer even if the employer did not issue an IRS W-2 form). If you need more space, attach a separate page.
  - Attach copies of all 2023 IRS W-2 forms issued to the parents by their employers
  - Attach IRS Verification of Non-Filing Letter. (Only if you have Foreign Income entered on the FAFSA and is selected for verification)

COMPLETE CHART ONLY IF BOX b ABOVE IS CHECKED	Employer's Name	2023 Amount Earned	IRS W-2 Forms Attached	IRS W-2 Forms "Not Issued"
		\$	<input type="checkbox"/>	<input type="checkbox"/>
		\$	<input type="checkbox"/>	<input type="checkbox"/>

### E. STUDENT NON-TAX FILER

Check the appropriate box below and provide the requested information and/or documents:

- a. ☐ I was not employed and had no income earned from work in 2023. Therefore, I was not required to file a 2023 Federal Tax Return.
- b. ☐ I was employed in 2023 and had income but was not required to file a 2023 Federal Income Tax Return.
- NOTE: If you can be claimed as a dependent by another taxpayer and earned more than \$13,850 in 2023, you are required by the IRS to file a federal tax return.*
- Complete the chart below by listing each employer(s) and the amount that was earned in 2023 (list every employer even if the employer did not issue an IRS W-2. If you need more space, attach a separate page.
  - Attach copies of all 2023 W-2 forms
- c.

COMPLETE CHART ONLY IF BOX b ABOVE IS CHECKED	Employer's Name	2023 Amount Earned	IRS W-2 Forms Attached	IRS W-2 Forms "Not Issued"
		\$	<input type="checkbox"/>	<input type="checkbox"/>
		\$	<input type="checkbox"/>	<input type="checkbox"/>

Student's First and Last Name: \_\_\_\_\_ Monroe University ID Number: \_\_\_\_\_

#### F. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (Must Be Signed at the Institution)

The student must appear in person at Monroe University - Bronx/New Rochelle Campus 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 designated financial aid administrator official, the Statement of Educational Purpose provided below.

##### IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose

(Print Student's First Name and Last Name)

and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Monroe University - Bronx/New Rochelle Campus for 2025-2026.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Monroe University ID Number

\_\_\_\_\_  
Date

#### G. CERTIFICATION

Each person signing this worksheet certifies that all information reported on this form is complete and accurate. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined up to \$20,000, be sentenced to jail, or both.**

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature (For dependent students only)

\_\_\_\_\_  
Date

##### \*\*\*\*\* OFFICE USE ONLY \*\*\*\*\*

Completed by the designated financial aid administrator:

ID Type: \_\_\_\_\_ Copy of ID attached: ☐

Designated FAA Name: \_\_\_\_\_  
(Print Designated FAA Name)

Designated FAA Title: \_\_\_\_\_

Designated FAA Signature: \_\_\_\_\_ Date: \_\_\_\_\_