

**2026-27 AGGREGATE VERIFICATION WORKSHEET GROUP (V5) IN-PERSON  
INDEPENDENT**

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.

**INSTRUCTIONS:**

- Complete this section if you and/or your spouse filed or will file a 2024 IRS Federal Income Tax Return(s). As part of the Federal Student Aid eligibility, you and spouse 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 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 2024 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS, via the FA-DDX.
- If 2024 Federal Income Tax Return information for you (or spouse if applicable) was not transferred via the FA-DDX and considered verified you must provide the institution with a **2024 IRS Tax Return Transcript (s) or a signed copy of the 2024 Federal Income Tax Return and applicable schedules**. A 2024 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.
- Independent student 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**

Use the information below to determine who should be included in the family size. **Family Size includes the following:**

- The student**
- The student's spouses (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 received 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" 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 2026-2027 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 your name and ID number at the top.

FULL NAME	AGE	RELATIONSHIP TO STUDENT
		SELF

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

**C. TAX FILERS – STUDENT (AND SPOUSE, IF MARRIED)**

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

SPOUSE'S (AND SPOUSE, IF MARRIED) INCOME INFORMATION	STUDENT'S INCOME INFORMATION
<input type="checkbox"/> I/we gave consent and approve sharing and importing 2024 Federal Income and Tax information from the IRS to my FAFSA form.	<input type="checkbox"/> I gave consent and approve sharing and importing 2024 Federal Income and Tax information from the IRS to my FAFSA form.
<input type="checkbox"/> I/we did not (or could not) import 2024 Federal Income and Tax information from the IRS to my FAFSA form. Therefore, I/we have attached my/our 2024 IRS Tax Transcript(s) or a signed copy of my/our 2024 Federal Income Tax return and applicable schedules.	<input type="checkbox"/> I did not (or could not) import 2024 income and tax information from the IRS to my FAFSA form. Therefore, I have attached my 2024 IRS Tax Transcript or a signed copy of my 2024 Federal Income Tax Return and applicable schedules.

**D. SPOUSE(S)' NON-TAX FILERS**

*By completing this document, I certify that I have not filed and am not required to file a 2024 income tax return, and all other income earned from work, other income, and resources for the 2024 tax year are listed below.*

Also check any box that applies below:

- a.  My spouse and I were **not** employed and had no income earned from work in 2024.
- b.  My spouse and/or I were employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form, or an equivalent document is provided.
  - Complete the chart below by listing every employer even if the employer did not issue a W-2 form and the amount that was earned in 2024. If more space is needed, provide a separate page with your name and ID number at the top.
  - Attach copies of all 2024 IRS W-2 forms issued to spouse by the employer(s)
  - 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	2024 Amount Earned	IRS W-2 Attached	IRS W-2 "Not Issued"
		\$	<input type="checkbox"/>	<input type="checkbox"/>
		\$	<input type="checkbox"/>	<input type="checkbox"/>

- c.  My spouse and/or I had other income and resources that supported us for the 2024 tax year. (List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top).

Source of Income	Annual Amount in 2024
<b>Total Amount of Income</b>	\$

**E. STUDENT NON-TAX FILER**

By completing this document, I certify that I did not file nor was I required to file a 2024 income tax return, and all other income earned from work, other income, and resources for the 2024 tax year are listed below.

Also check any box that applies below:

a.  I certify that I was **not employed** and had no income earned from work in 2024. Therefore, I was not required to file a 2024 Federal Income Tax Return.

b.  I was **employed in 2024** and had income but was not required to file a 2024 Federal Income Tax Return.

*NOTE: If you can be claimed as a dependent by another taxpayer and earned more than \$14,600 in 2024, you are required by the IRS to file a federal tax return.*

- Complete the chart below by listing every employer even if the employer did not issue a W-2 form. and the amount that was earned in 2024. If more space is needed, provide a separate page with your name and ID number at the top.
- Attach copies of all 2024 IRS W-2 forms issued by your employers

COMPLETE CHART ONLY IF BOX b ABOVE IS CHECKED	Employer's Name	2024 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"/>

c.  One or both of my parents had other income and resources that supported us for the 2024 tax year. (List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top).

Source of Income	Annual Amount in 2024
<b>Total Amount of Income</b>	\$

**F. VERIFICATION OF IDENTITY**

In order to complete verification at [Monroe University - Bronx/New Rochelle Campus](#) and to verify your identity, you must present:

a. An unexpired, valid, government-issued photo identification (ID) such as a U.S. passport, a driver's license, or other state issued ID.

Check the box that applies below:

- The student appeared in person and presented acceptable identification to an institutionally authorized individual.
- The student was verified by a service provider that is compliant with National Institute of Standards and Technology Identity Assurance Level 2 (NIST IAL2). The institution received acceptable documentation directly from the service provider confirming the date of the verification and that the student's identity was verified under the NIST IAL2 standard.
- The student was unable to appear in-person and provided the institution with a copy of the acceptable identification presented to a notary and a signed notary statement.
- The student was unable to appear in-person and appeared on a video call with institutional personnel and presented the acceptable identification to an institutionally authorized individual.
- The student is a confined or incarcerated individual and was verified by an authorized official at the correctional facility where the individual is confined or incarcerated.

Student's First and Last Name \_\_\_\_\_

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

**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

**\*\*\*\*\* 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: \_\_\_\_\_