

Troy University
 Financial Aid Office
 134 Adams Administration Bldg.
 Troy, AL 36082

**Dependent
 Verification Worksheet (V1)
 2026-2027
 Call 1-800-414-5756 for questions**



Your 2026-2027 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provide correct information, we will compare your FAFSA with the information on this institutional verification document and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid office at Troy University. The financial aid office may ask for additional information. If you have questions about verification, contact the financial aid office as soon as possible so that your financial aid will not be delayed. You must return this form to the address listed on this form.

A. Student Information

Student's Name: _____ Student ID Number: _____
First M.I. Last

Date of Birth: _____ Home Phone: _____ Cell Phone: _____

Email: _____ Work Phone: _____

Address: _____
Street/P.O. Box City State Zip

B. Family Information

List below the people in the parents' household. Include:

- 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 receive 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 between July 1, 2026, and June 30, 2027.
- Other persons if the following are true:
 - They live with the student's parents,
 - They receive 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 between July 1, 2026, and June 30, 2027.

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 parent 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 |
|-------------------------|-----|--------------|
| You, the student | | |
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C. Verification of 2024 IRS Income Tax Return Information for Student Tax Filers

Instructions: Complete this section if the student filed or will file a 2024 IRS income tax return(s). *The best way to verify income is by using the FUTURE Act Direct Data Exchange (FA-DDX) that transfers IRS federal tax information (FTI) to the FAFSA on the Web.* In most cases, no further documentation is needed to verify 2024 IRS income tax return information that was transferred into the student's FAFSA using the FA-DDX if that information was not changed by the FAFSA filer.

Check the box that applies:

Student has used the FA-DDX to directly import their 2024 IRS income tax return information into the student's FAFSA. **Must include W-2 Forms and applicable schedules.**

Student is unable or could not use the FA-DDX, and instead will provide the school a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return. Must include W-2 Forms and applicable schedules.**

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." Create an ID.me account.
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

Check here if a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024tax return, W-2 Forms and applicable schedules** is provided.

Check here if a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 tax return, W-2 Forms and applicable schedules** will be provided later.

Verification of 2024 Income Information for Student Nontax Filers

Complete this section if the student will not file and is not required to file a 2024 income tax return with the IRS.

Check the box that applies:

Student was not employed and had no income earned from work in 2024.

Student was employed in 2024 and has listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form is provided. [Provide copies of all 2024 IRS W-2 forms issued to the student by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student's name and student's ID number at the top.

| Employer's Name | 2024 Amount Earned | IRS W-2 Provided? |
|---------------------------------|----------------------|-------------------|
| Suzy's Auto Body Shop (example) | \$2,000.00 (example) | Yes (example) |
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Foreign Country Non-tax Filers Only: Provide documentation from a relevant tax authority other than the IRS that indicates a 2024 income tax return was not filed or a signed and dated statement from the student that they were not required to file a tax return for 2024.

Check here if confirmation of nonfiling is provided.

Check here if signed and dated statement is provided.

Student's Name _____ SSN: _____

D. Verification of 2024 IRS Income Tax Return Information for Parent Tax Filers

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Instructions: Complete this section if the parents filed or will file a 2024 IRS income tax return(s). The best way to verify income is by using the FUTURE Act Direct Data Exchange (FA-DDX) that transfers IRS federal tax information (FTI) to the FAFSA on the Web. In most cases, no further documentation is needed to verify 2024 IRS income tax return information that was transferred into the student's FAFSA using the FA-DDX if that information was not changed by the FAFSA filer.

Check the box that applies:

Parent(s) have used the FA-DDX to directly import their 2024 IRS income tax return information into the student's FAFSA. **Must include W-2 Forms and applicable schedules.**

Parent(s) are unable or could not use the FA-DDX in FAFSA, and instead will provide the school a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return. Must include W-2 Forms and applicable schedules.**

A 2024 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." Create an ID.me account.
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

If the parents filed separate 2024 IRS income tax returns, **2024 IRS Tax Return Transcripts or a signed copy of the 2024 income tax return and applicable schedules must be provided for each.**

Check here if a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 tax return, W-2 Forms and applicable schedules** is provided.

Check here if a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 tax return, W-2 Forms and applicable schedules** will be provided later.

Verification of 2024 Income Information for Parent Nontax Filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2024 income tax return with the IRS.

Check the box that applies:

One parent was not employed and had no income earned from work in 2024.

Neither parent was employed and had no income earned from work in 2024.

One or both parents 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 is provided. [Provide copies of all 2024 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, provide a separate page with the student's name and student's ID number at the top.

| Employer's Name | 2024 Amount Earned | IRS W-2 Provided? |
|---------------------------------|----------------------|-------------------|
| Suzy's Auto Body Shop (example) | \$2,000.00 (example) | Yes (example) |
| | | |
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| | | |

Foreign Country Non-tax Filers Only: Provide documentation from a relevant tax authority other than the IRS that indicates a 2024 income tax return was not filed or a signed and dated statement from the parent(s) that they were not required to file a tax return for 2024.

Check here if confirmation of nonfiling is provided.

Check here if signed and dated statement is provided.

Student's Name _____ SSN: _____

Instructions: Please complete all the fields below. If any field is left blank, we will consider the form incomplete. We will **NOT** assume 0.

| STUDENT (Yearly Amount) | 2024 Additional Financial Information | PARENT(S) (Yearly Amount) |
|----------------------------|---|------------------------------|
| | Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3: line 3 + IRS Form 1040: line 29 | |
| | Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. | |

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|--|--|--|
| | Child support received for all children for the last completed calendar year. For example, if the student is completing the 26-27 FAFSA in January 2026, they will report child support received for the 2025 calendar year. If the student is completing the 26-27 FAFSA in January 2027, they will be reporting child support received for 2026. Don't include foster care or adoption fees. | |
|--|--|--|

| STUDENT (Yearly Amount) | 2024 Untaxed Income | PARENT(S) (Yearly Amount) |
|----------------------------|---|------------------------------|
| | IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1-total of lines 16 + 20. | |
| | Tax exempt interest income from IRS Form 1040-line 2a. | |
| | Untaxed portions of IRA distributions from IRS Form 1040- (line 4a minus 4b) Exclude rollovers. If negative, enter a zero here. | |
| | Untaxed portions of pensions from IRS Form 1040- (line 5a minus 5b) Exclude rollovers. If negative, enter a zero here. | |
| | Foreign earned income exclusion from IRS Form 1040 Schedule 1: line 8d | |

Student's Name _____

Student ID Number: _____

F. Certification and Signature

Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:

You must complete the FA-DDX that transfers IRS federal tax information or submit a copy of your 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return. Must include W-2(s), and applicable schedules when you file your IRS income tax return for verification to be considered complete.

Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 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 2024 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 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent must sign and date.

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date