CATAWBA COLLEGE
Transform. Inspire. Belong.

2027-2028 INDEPENDENT VERIFICATION WORKSHEET

Student Name: _____ Student ID# _____

Email: _____ Home/Cell Phone_____

Your 2027-2028 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. This process is mandated by the US Department of Education, requiring schools to verify the data provided on the FAFSA to ensure its accuracy. We must ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this worksheet and with any other required document(s). If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet and submit it to the Financial Aid Office.

NOTE: *Additional documentation may be requested for clarification.*

A. Student's Household Information

List below the people in your household. **Include**:

- **You:** the student
- **Your spouse:** if you are married. Exclude a spouse who has died or is not living in the household because of separation or divorce. Include a spouse who is on active duty in the U.S Armed forces.
- **Your and/or your spouse's children:** if any, you will provide more than half of their support from July 1, 2027–June 30, 2028, or if the child would be required to provide your information if they were completing a FAFSA for 2027–2028. Include children who meet either of these standards, even if they do not live with you.
- **Other people:** if you will provide more than half of their support and will continue to provide more than half of their support from July 1, 2027, through June 30, 2028.

The provided criteria for "dependent children" or "other people" align with the requirement that family size align with whom you can claim as a dependent on a U.S. tax return if you were to file a U.S. tax return at the time of completing any the 2027-2028 FAFSA. As a result, you should not include any unborn children in the family size.

FULL NAME	AGE	RELATIONSHIP
Marty Jones(example)	*18*	*Brother*
		Self

B. Income Tax Information

Check ONE box that applies to you, and ONE box that applies to your spouse (if applicable).

STUDENT	SPOUSE
☐ I **filed** a 2025 Federal Tax Return. Did you use the IRS Direct Data Exchange to transfer 2025 IRS income tax return information? ☐ Yes ☐ No: Update your FAFSA and use the **IRS Direct Data Exchange *OR** submit a copy of your signed 2025 federal income tax return. (Form 1040 & any Schedules filed) *(See information below)*	☐ I **filed** a 2025 Federal Tax Return. Did you use the IRS Direct Data Exchange to transfer 2025 IRS income tax return information? ☐ Yes ☐ No: Update your FAFSA and use the **IRS Direct Data Exchange *OR** submit a copy of your signed 2025 federal income tax return. (Form 1040 & any Schedules filed) *(See information below)*
☐ I **did NOT file** a 2025 Federal Tax Return ***BUT*** did earn income in 2025; however, I was not required to file taxes. **List the employer and amount earned for 2025:** Employer:_____ Earned: $_____ Employer:_____ Earned: $_____ Employer:_____ Earned: $_____	☐ I **did NOT file** a 2025 Federal Tax Return ***BUT*** did earn income in 2025; however, I was not required to file taxes. **List the employer and amount earned for 2025:** Employer:_____ Earned: $_____ Employer:_____ Earned: $_____ Employer:_____ Earned: $_____
☐ I was **NOT employed** and had **NO INCOME earned** from work in 2025. *****IRS Letter of Non-Filing is required for the student if they did NOT file 2025 taxes**** *(See information below)*	☐ I was **NOT employed** and had **NO INCOME earned** from work in 2025. *****IRS Letter of Non-Filing is required for the spouse if they did NOT file 2025 taxes**** *(See information below)*

**** How to Obtain an IRS Tax Return Transcript From the IRS**

Be sure to request a **Tax Return Transcript**.

We ***cannot*** accept a Tax Account Transcript or copies of your 1040, 1040A or 1040EZ.

- Online request at https://www.irs.gov/individuals/get-transcript
- Automated Telephone Request: 1-800-908-9946.
- Paper Request: IRS Form 4506T – Must be used if you have moved since filing your taxes. Can be downloaded at www.irs.gov, or obtained from the Financial Aid Office.
- Visit your local IRS Office.

C. Submit Copies of all Earnings, Other Income, & Resources:

The sources and amounts of earnings, other income, and resources that supported the individuals for the 2025 tax year.

Copies of W-2s or an equivalent document for each source of 2025 employment income.

All copies are to be submitted to the Catawba College Financial Aid Office. Please attach copies to this form.

- If you have lost any W-2's, you may order a **Wage and Income Transcript** from the IRS to satisfy the requirement. You can obtain this Transcript from the same website that you request a Tax Return Transcript.

Signatures

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

STUDENT SIGNATURE: _____ DATE: _____

SPOUSE SIGNATURE: _____ DATE: _____
(If Applicable)

WARNING: If you purposely give false or misleading information in an attempt to obtain federal financial aid, you may be fined up to $20,000 and/or incarcerated.

All forms & documentations should be submitted to the Financial Aid Office at Catawba College, 2300 West Innes Street Salisbury, NC 28144. To securely upload documents, log into My Catawba Portal, and use the **Financial Aid Document Upload**. **The Financial Aid Document Upload** can be found on the left-hand side of the screen under **Systems.** Due to Federal Regulations, no personally identifiable (Tax Return Transcripts and W2 information) can be scanned to email.