YOUNGSTOWN STATE UNIVERSITY
Office of Financial Aid and Scholarships

2027-2028 Independent Verification Worksheet

Federal Student Aid Programs

Independent

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your FAFSA application with copies of your and your spouse's (if applicable) 2025 federal tax return transcripts, or other financial documents. The law states we have the right to ask you for this information before awarding federal aid. If there are differences between your FAFSA application information and your financial documents, you or your school may need to make corrections electronically, or by using your paper FAFSA Submission Summary.

1. Submit the completed 2027-2028 Independent Verification Worksheet. Make sure the form is **signed by the student and spouse (if applicable)**. Form can be uploaded to: www.ysu.edu/finaid/upload.

2. If the number in the household you are reporting on the Verification Worksheet does not match the number(s) you reported on the FAFSA, submit a written explanation of the discrepancy which must be **signed by the student and spouse (if applicable)**.

3. If requested, submit **2025 Federal Tax Return Transcript(s), or a signed copy of the 2025 tax form 1040 and applicable tax schedules (see below),** for both student and spouse, if filed. **You can obtain a Federal Tax Return Transcript by calling the IRS at 1-800-908-9946 or at www.irs.gov/individuals/get-transcript**.

4. **If filed**, the following schedules and forms may be requested from your tax return:
   - **Schedule 1** (Additional Income and Adjustments to Income)
   - **Schedule 3** (Additional Credits and Payments)
   - **Schedule C** (business income)
   - **Schedule E** (property rental, royalties, S corps, trusts, etc.)
   - **Schedule F** (farm income)
   - **1099 R** (distributions from IRS, pensions, annuities, etc.)
   - **Signed 1040X** (if taxes were amended)
   - **W-2** (wage and tax statement)

Scan to access the Financial Aid Upload Tool

A. Student Information

YSU Banner ID | Last Name | First Name | M.I.

Street Address

City | State | Zip Code

Date of Birth | Phone Number

B. Family Information

1. List the people in your household, including:

- yourself and your spouse, if you have one, and
- your children, if you will provide more than half of their financial support from July 1, 2027 through June 30, 2028, even if they do not live with you, and
- other people if they now live with you, and you now provide more than half of their financial support and will continue to provide more than half of their support from July 1, 2027 through June 30, 2028.

Full Name	Age	Relationship
		Self

C. Student's Filing Status, Tax Form, and Income Information

1. Check only one box below:

- ☐ I completed a 2025 federal tax return. *Select one option below:*
  - ☐ I provided consent to disclose my federal income and tax information directly from the IRS to the FAFSA via the FUTURE Act Direct Data Exchange (FA-DDX).
  - ☐ I will submit a copy of my 2025 Federal Tax Return Transcript or signed copies of my federal tax return and applicable schedules.
- ☐ I did not work in 2025. I did not and will not file a 2025 federal tax return. *You must also submit the following:*
  - **A written explanation of how you financially met your basic living expenses in 2025 (See Non-Filer Form).**
- ☐ I worked in 2025, but I did not file a 2025 federal tax return. *You must also submit the following:*
  - **A copy of the W-2(s) for each source of employment.**
  - **For income earned outside of the U.S., IRS Verification of Non-filing Letter or confirmation of non-filing from the relevant tax authority outside of *the IRS*. Please see page 4 of this document for instructions on obtaining the Non-Filing Letter.**
  - **List below all employers and the amounts earned in 2025:**

ONLY COMPLETE IF YOU MADE WAGES, BUT WERE NOT REQUIRED TO FILE TAXES

Employer Name	2025 Earnings

D. Spouse's Filing Status, Tax Form, and Income Information

1. Check only one box below:

- ◯ Spouse filed their 2025 federal tax return jointly with student.
  - ◯ Student and spouse provided consent to disclose federal income and tax information directly from the IRS to the FAFSA via the FUTURE Act Direct Data Exchange (FA-DDX).
  - ◯ Student and spouse will submit a copy of their 2025 Federal Tax Return Transcript or signed copies of their federal tax return and applicable schedules.
- ◯ If filed separately, the spouse completed a 2025 federal tax return. *Select one option below:*
  - They provided consent to disclose federal income and tax information directly from the IRS to the FAFSA via the FUTURE Act Direct Data Exchange (FA-DDX).
  - They will submit a copy of their 2025 Federal Tax Return Transcript or signed copies of their federal tax return and applicable schedules.
- ◯ Spouse did not work in 2025. They did not and will not file a 2025 federal tax return.
- ◯ The spouse worked in 2025 but was not required to file a 2025 federal tax return. *You must also submit the following:*
  - **-A copy of the W-2(s) for each source of employment.**
  - **- For income earned outside of the U.S., IRS Verification of Non-filing Letter or confirmation of non-filing from the relevant tax authority outside of *the IRS*. Please see page 4 of this document for instructions on obtaining the Non-Filing Letter.**
  - **-List below all employers and the amount your spouse earned in 2025:**

ONLY COMPLETE IF YOU MADE WAGES, BUT WERE NOT REQUIRED TO FILE TAXES

Employer Name	2025 Earnings

Untaxed Income Information	**Student/Spouse**
Untaxed portions of Individual Retirement Account (IRA) distributions (from IRS Form 1040-line 4a minus 4b). Exclude rollovers. If negative, enter a zero here.	$ Rollover ☐
Untaxed portions of pension (from IRS Form 1040-line 5a minus 5b). Exclude rollovers. If negative, enter a zero here.	$ Rollover ☐

Sign Worksheet

Each person signing the verification worksheet is certifying that all information reported is complete and correct. The student and spouse must sign and date.

Student _____ Date _____

Spouse _____ Date _____

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

IMPORTANT DOCUMENT INFORMATION

IRS Tax Return Transcript

Some tax filers may not be able to participate in the FA-DDX on the FAFSA. If that applies to you, submit the IRS Tax Return Transcript, or a signed copy of the 2025 tax form 1040, as well as tax schedules 1 and/or 3.

A Federal IRS Tax Return Transcript can be obtained online or by mail, free of charge, by visiting **www.irs.gov** (click on "Get Tax Records"), or by calling **1-800-908-9946**. Be sure to request a "**Return Transcript**" and **NOT** an "**Account Transcript**." *Federal financial aid policies do not allow us to accept a copy of your state tax return*.

If you filed an amended tax return for 2025, you must provide a copy of your tax transcript, or a signed copy of the tax form 1040 (which will include only information from the original tax return), AND a signed copy of the 2025 IRS form 1040X that was filed with the IRS.

If you were a victim of IRS tax-related identity theft and cannot obtain an IRS Tax Return Transcript, you can provide a signed copy of the 2025 tax form 1040 as well as tax schedules 1 and/or 3 along with either an IRS Letter 4674C or signed and dated statement from the tax filer that he or she was victim of IRS tax related identity theft and the IRS is aware of it.

Individuals who Filed Non-IRS Income Tax Return or Non-Filers who Earned Income outside of the U.S.

A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority.

For non-filers who earned income outside of the U.S., provide verification of non-filing from the relevant tax authority outside of the IRS dated on or after October 1, 2026.

An IRS Verification of Non-Filing Letter can be obtained online or by mail, free of charge, by visiting **www.irs.gov** (click on "Get Tax Records"), or by calling **1-800-908-9946**. To obtain an IRS Verification of Non-filing Letter, individuals must complete the process for requesting a tax transcript as listed above. The IRS will provide a non-filing letter only if a return was not filed.

WHAT HAPPENS NEXT

1. A financial aid professional will compare information on this worksheet, and any required supporting documents, with the information submitted on the 2027-2028 FAFSA. Please allow up to 7-10 business days for this review. Please note, expect extended wait times for the verification review process to be completed during our peak processing period (July-September).
2. If additional documentation is requested after reviewing the worksheets and supporting documents, we will request the additional information via the student's YSU email. It is the responsibility of the student to check their email on a regular basis.
3. Youngstown State University will electronically submit any corrections to the 2027-2028 FAFSA (if required).
4. The U.S. Department of Education will reprocess the FAFSA if corrections are submitted and necessary. The student will receive an updated electronic FAFSA Submission Summary.
5. If the student's financial aid eligibility changes for 2027-2028 as a result of corrections, the financial aid awards will be updated on the student's YSU Penguin Portal.