



Santa Clara University Financial Aid Office
2024-2025 V5 Aggregate Verification Worksheet - Independent

Your 2024-2025 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The U.S. Department of Education regulations state that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA.

To verify that you provided correct information, the Financial Aid Office at Santa Clara University will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected by the Financial Aid Office.

- **You must complete and sign this worksheet, attach any required documents, and submit them to the Financial Aid Office.**
- **Please be sure to include your student’s name and SCU ID number on any attached documents and on any additional documents that may be sent later.**
- **Please submit documents in PDF format only. Photo attachments are not acceptable.**

After review, Santa Clara University may ask for additional information. If you have questions about verification, contact our office as soon as possible so that your financial aid will not be delayed.

A. Independent Student’s Information

Print Full Name (as it appears on your campus student records)	Campus/Student Identification Number
Print Full Mailing Address (Number, Street, City, State, Zip Code)	Student’s Date of Birth
	Phone Number
E-mail Address	Student’s Social Security Number

B. Independent Student’s Family/Household Information

1. List **everyone** in your household using the table below. Be sure to include everyone in your family/household from each of the categories listed below as they apply to you:

- **Yourself.**
- **Your spouse**, if you are married.
- **Your and/or your spouse’s children** even if they are not claimed as dependents on your tax return or if they do not live with you, as long as
 - (a) you (and if married, your spouse) will provide more than half of their support from July 1, 2024 through June 30, 2025, or
 - (b) the children would be required to provide parental information when applying for Federal Student Aid.
- **Anyone else living in the household**, if you (and if married, your spouse) provide more than half of their support and will continue to provide more than half of their support through June 30, 2025.

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

2. Include the name of the college for any household member who is, or will be, enrolled at least half time in a degree, diploma or certificate program at an eligible postsecondary educational institution any time between July 1, 2024 and June 30, 2025.

Full Name	Age	Relationship	College	Will be enrolled at least half time
<i>(Example) Irene Adler</i>	<i>21</i>	<i>Spouse</i>	<i>Imperial College</i>	<i>Yes</i>
		Self	Santa Clara University	

C. Independent STUDENT’S Income Information to be Verified

Section 1:

COMPLETE THIS SECTION IF YOU (AND/OR YOUR SPOUSE, IF MARRIED) FILED A TAX RETURN IN 2022.

***If you did **not** file a tax return in 2022, please **skip** this section and go on to Section 2.*

Check the box that applies (check only one box):

- I, the student, have used the Direct Data Exchange (DDX) in *FAFSA on the Web* to transfer 2022 IRS income tax return information into my FAFSA.
- I, the student (and, if married, my spouse) have not yet used the Direct Data Exchange (DDX) in *FAFSA on the Web* to transfer 2022 IRS income tax return information onto the FAFSA.
- I, the student (and, if married, my spouse) am unable or choose not to use the Direct Data Exchange (DDX) in *FAFSA on the Web*, and instead has attached to this worksheet either:
- a) a **signed** copy of the 2022 IRS income tax return and applicable schedules, **or**
 - b) a copy of the 2022 IRS Tax Return Transcript.

How to obtain a 2022 IRS Tax Return Transcript:

- **Get Transcript by Mail** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" (**NOT** the "Account Transcript"). The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" (**NOT** the "Account Transcript"). To use the Get Transcript Online tool, the user must have the following: (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **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** – Paper Request Form – [IRS Form 4506T-EZ](#) or [IRS Form 4506-T](#). The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
- If you wish to visit a local IRS office, you can find the nearest IRS office [here](#).

Section 2:

IF YOU (AND/OR YOUR SPOUSE, IF MARRIED) DID NOT FILE A TAX RETURN IN 2022, EVEN IF YOU WORKED AND EARNED INCOME:

Check the box that applies (check only one box):

- The student (and spouse, if any) was not employed and had no income earned from work in 2022.

Student name _____ SCU ID: _____
 Name as it appears on Santa Clara University student records

The student (and spouse, if any) was employed in 2022 but did NOT file a tax return. *(Please follow instructions below.)*

Students (and/or their spouse, if married) who were employed in 2022 but did not file a tax return, please use the table provided below to list the names of all employers and the amount earned from each employer in 2022.

- List every employer even if they did not issue an IRS W-2 form.
- Provide copies of all 2022 IRS W-2 forms issued to the student.
- If you are unable to provide your 2022 IRS W-2 forms, you can request a [Tax Account Transcript](#). The transcript is generally received within 10 business days from the IRS's receipt of your request.

NOTE: Failure to submit W-2 forms for students who did not file a tax return in 2022 will result in Santa Clara University being unable to complete the verification process. *If you are unable to obtain a W-2, please contact our office for additional instructions.*

Student to complete this information ONLY if they worked but did NOT file a tax return in 2021:

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2022
<i>(Example) Reichenback Falls Café</i>	<i>Yes</i>	<i>\$2,000</i>
Total Amount of Income Earned From Work		\$

CONFIRMING OF NON-FILING DOCUMENT FROM THE IRS:

Required for all students (and their spouse, if married) who did *not* file a tax return.

All students (and their spouse, if married) who did not file a tax return in 2022 (non-filers) must provide documentation from the IRS (or other relevant tax authority) dated on or after October 1, 2023 that indicates a 2022 IRS income tax return was not filed with the IRS (or other relevant tax authority), or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

Check here if a confirmation of non-filing document from the IRS or a signed statement is provided.

Check here if a confirmation of non-filing document from the IRS or a signed statement will be submitted to Santa Clara University later. *(Instructions on following page.)*

Student name _____ SCU ID: _____
 Name as it appears on Santa Clara University student records

A confirmation of non-filing document (also known as a Verification of Non-filing Letter) from the IRS may be obtained:

- **Online** – Go to www.irs.gov/individuals/get-transcript. Click “Get Transcript Online”. This option is not available if you have never filed taxes in prior years.
- **By Phone** – 1-800-829-1040.
- **By Mail**- Complete IRS Form 4506-T. Check box 7. The Verification of Non-Filing Letter will be mailed to you within 10 business days.

NOTE: Failure to submit W-2 forms and a confirmation of non-filing document from the IRS or a signed statement (for students who did **not** file a tax return in 2022) will result in Santa Clara University being unable to complete the verification process.
If you are unable to obtain a W-2 or a confirmation of non-filing from the IRS, please contact our office for additional instructions.

E. Certification and Signature

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. **The student must sign and date this form.** Spouse’s signature is optional. *****Please note that this must be signed by hand, typed or electronic signatures are not allowed.***** Sign with BLUE ink.

WARNING: If you purposely give false or misleading information on this form you may be fined, receive a prison sentence or both. All form(s), paperwork and documentation are property of Santa Clara University, and will be kept and maintained with file.

Print Full Name (as it appears on your campus student records)	Date
Student’s Signature	

Print Full Name of Spouse (Optional)	Date
Spouse’s Signature (Optional)	

Student name _____ SCU ID: _____
Name as it appears on Santa Clara University student records

**Identity and Statement of Educational Purpose
(To Be Signed at the Institution)**

The student must appear in person at SANTA CLARA UNIVERSITY 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 institutional official, the Statement of Educational Purpose provided below.

Certification and Signature – Sign with BLUE ink

Certification and Signature

Each person signing below certified that all of the Information reported is complete and correct.

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

Print Student's Name

Student's ID Number

Student's Signature (Required)

Date

Spouse's Signature (Optional)

Date

FOR OFFICE USE ONLY

Print Staff Member Name: _____

Acceptable Documents

Date Received: _____

Unacceptable Documents

Signature of Staff Member: _____

Student name _____ SCU ID: _____
Name as it appears on Santa Clara University student records

**Identity and Statement of Educational Purpose
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at SANTA CLARA UNIVERSITY to verify his or her identity, the student must provide to the institution:

(a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and

(b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Notary's Certificate of Acknowledgement – Sign in BLUE ink

State of _____

City/County of _____

On _____ before me, _____,
(Date) (Notary name)

personally appeared, _____, and provided to me on
(Printed name of signer)

basis of satisfactory evidence of identification _____
(Type of government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

Witness my hand and official seal _____ (Seal)
(Notary signature)

My commission expires on _____ (Date)