



V1: Dependent Verification Worksheet 2026-2027

STUDENT INFORMATION

Student Name _____ MBU ID _____

Address _____ City _____ State ____ Zip Code _____

Student's Primary Phone # _____ Student's Primary Email Address _____

Parent's Primary Phone # _____ Parent's Marital Status _____

SECTION 1: FAMILY SIZE

Instructions: Complete the below chart for your family size according to the FAFSA definition.

Family Size includes the following:

- Yourself (the student)
- Your parents, even if you are 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.
- Your siblings, if all the following are true:
 - They live with your parents (or live apart because of college enrollment),
 - They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2026 through June 30, 2027
- Other persons if all the following are true:
 - They live with your parents,
 - They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2026 through June 30, 2027

Note: 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, parents should not include any unborn children in the family size.

If more space is needed, please provide a separate page with your name and student ID at the top.

Full Name	Age	Relationship
		SELF

Student Name _____ MBU ID _____

SECTION 2: VERIFICATION OF 2024 INCOME INFORMATION FOR PARENT TAX FILERS

Important Note: The instructions below apply to each parent included in the family size on the FAFSA. Notify the financial aid office if the parents had a change in marital status after December 31, 2024.

Instructions: Complete this section if the parents filed or will file a 2023 IRS income tax return(s). Check all that apply:

I/We consented to transfer the 2024 IRS income tax information and it was successfully transferred into the FAFSA.

- 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.

I/We consented to transfer the 2024 IRS income tax information and it was not transferred into the FAFSA.

- If the 2024 income tax return information for the parent was not available or could not be used, provide the MBU Financial Aid Office with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules. If the parents filed “married filing separately”, **both** parents’ tax return transcripts for 2024 will need to be sent to us.

A 2023 IRS Tax Return Transcript may be obtained through:

- **Get Transcript Online**
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - To use the Get Transcript Online tool, the user must have (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.
- **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" and NOT the "Account Transcript."
 - The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- **Automated Telephone Request**
 - Call 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 from the IRS’s receipt of the paper request form.

I/We filed an amended IRS Income Tax Return for 2024.

- 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 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 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.

SECTION 3: VERIFICATION OF 2024 INCOME INFORMATION FOR STUDENT TAX FILERS

Instructions: Complete this section if the student filed or will file a 2024 IRS income tax return(s). Check all that apply:

I consented to transfer the 2024 IRS income tax information and it was successfully transferred into the FAFSA.

- 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.

I consented to transfer the 2024 IRS income tax information and it was not transferred into the FAFSA.

- If the 2024 income tax return information for student was not available or could not be used, provide the MBU Financial Aid Office with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules.

A 2023 IRS Tax Return Transcript may be obtained through:

- **Get Transcript Online**
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - To use the Get Transcript Online tool, the user must have (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.
- **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" and NOT the "Account Transcript."
 - The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Automated Telephone Request**
 - Call 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 from the IRS's receipt of the paper request form.

I filed an amended IRS Income Tax Return for 2024.

- 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 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.

SECTION 4: VERIFICATION OF 2024 INCOME FOR NON-TAX FILERS

Instructions: Complete this section ONLY if parents and/or student will not, and were not required to, file a 2024 income tax return with the IRS. The term "parents" refers to the parent or parents included in the family size of the FAFSA. Follow each of the steps below.

Step 1: Parent Non-Tax Filer - check the appropriate box below:

Neither parent was employed, and neither had 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 was provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student's name and MBU ID.

Employer's Name	Name of Parent Employed	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2024
			\$
			\$
			\$
			\$
Total Amount of Income Earned from Work			\$

Step 2: Student Non-Tax Filer. Check the appropriate box below:

Student was not employed and had no income earned from work in 2023.

Student was employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page which includes the student's name and MBU ID.

Employer's Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2024
		\$
		\$
		\$
		\$
Total Amount of Income Earned from Work		\$

Step 3: Non-Tax Filer Statement if income earned in 2024

Provide a signed and dated statement certifying that the individual(s) has not filed and is not required to file a 2024 income tax return, as well as the sources of 2024 income earned from work and the amount of income from each source.

_____ Check here if non-filing statement is provided.

_____ Check here if non-filing statement will be provided later.

Step 4: Submit copies of all 2024 W-2 Forms issued to the parents and students who had any income in 2024.

Additional documentation may be requested by the financial aid office upon review of your worksheet and income information.

Each person signing below certifies that all of 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 (Required)

Date

Parent Signature (Required)

Date

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