



2025-2026 Dependent Verification Worksheet

Your Free Application for Federal Aid (FAFSA) was selected for review in a process called verification. Before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. We will compare your FAFSA with the information you report on this and any other required documentation. If there are differences, your FAFSA information may need to be corrected. You and the parent whose information was reported on the FAFSA must complete and sign this worksheet and submit it to our office to avoid any delay in processing your request for financial aid. Contact our office if you have any questions regarding this form at 510.879.9200. Submit this completed form with any required documents to the Financial Aid Office by email to: FinAid@samuelmerritt.edu.

A. Student Name : (please print)

Last Name	First Name	Middle Initial
Address	City, State	ZIP
Student ID#	Date of Birth	Phone Number

B. Family Size: List the people living in your parent(s) household, including:

- Yourself
- Your parent(s) even if you don't live with your parent(s). Exclude your 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 the following are true:
 - They live with your parents (or live apart because of college enrollment),
 - They receive more than half of your parent(s) support and will continue to receive more than half of your parents support during the award year.
- Other people if the following are true:
 - They live with your parent(s)
 - They receive more than half of your parent(s) support and will continue to receive more than half of your parents support during the award year.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half-Time (Yes or No)

C. Student Tax Information:

____ Check here if you have used the IRS Data Retrieval tool and the information is unchanged.

____ Check here if you are attaching a 2023 IRS Tax Return Transcript or a signed copy of the signed 2023 income tax return and applicable schedules.

____ Check here if you will not file and are not required to file a 2023 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at:

<https://www.samuelmerritt.edu/admission/affording-smu/financial-aid-and-scholarships>

D. Parent(s) Tax Information:

____ Check here if you have used the IRS Data Retrieval tool and the information is unchanged.

____ Check here if you are attaching a 2023 IRS Tax Return Transcript or a signed copy of the signed 2023 income tax return and applicable schedules.

____ Check here if you will not file and are not required to file a 2023 U.S. Income Tax return. If not filing, please complete a Non-Tax Filer Form found at:

<https://www.samuelmerritt.edu/admission/affording-smu/financial-aid-and-scholarships>

A **2022 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 "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.
- 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.
- 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 – 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.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 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 **2022 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 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Signatures:

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

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

Student

Date

Parent

Date