



# Samuel Merritt University

## 2025-2026 Verification Worksheet (V5)

### Independent Student

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](mailto: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 Information

- List the people your parents will support between July 1, 2025 and June 30, 2026. Family size includes the following:
  - The student.
  - The student's spouse, if applicable.
  - The student's dependent children if the following are true:
    - They live with the student (or live apart because of college enrollment);
    - They receive more than half of their support from the student; and
    - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
  - They live with the student;
  - They receive more than half of their support from the student; and
  - They will continue to receive more than half their support from the student during the award year.

The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size.

Write the name of the college below for any household member, who 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, 2025 and June 30, 2026.

If more space is required, attach a separate page with the student’s name and P# at the top

Full Name	Age	Relationship	College	Will be enrolled Half-time or Less

### C. Student and/or Spouse (if married) Income Information to Be Verified:

NOTE: Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023. If you filed an amended 2023 IRS tax return, you may be required to submit additional documentation.

- My (or my spouse) 2023 income tax return was used and successfully imported into the FAFSA. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS. (Skip to Section D.)
- My (or my spouse) 2023 income tax return was unavailable or could not be used, and instead will provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 Federal Income Tax Return and applicable schedules. (Skip to Section D.)
- I (or my spouse) was not employed and had no income earned from work in 2023. (Go to Non-tax Filers section, page 3)
- I (or my spouse) was employed in 2023 but was not required to file an income tax return. I 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. (Go to Non-tax Filers section, page 3)

### **For Student Non-tax Filers**

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

\_\_\_\_\_ Check here if non-filing statement is signed and dated.

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

RECOMMENDED for tax filers: Import 2023 tax income information to the FAFSA:

1) As part of federal student aid eligibility, students and parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective.

2) In other words, if the parents filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS.

A 2023 IRS Tax Return Transcript may be obtained through:

3) BY MAIL – Go to [www.irs.gov](http://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.

4) ONLINE – Go to [www.irs.gov](http://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 is displayed online upon successful completion of the IRS's two-step authentication.

5) PHONE – Call 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

6) PAPER REQUEST – Complete 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.

### **Additional Tax Information**

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS; and

- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax related identity theft, and that the IRS is aware of the tax-related identity theft.

### Individuals Who Filed Non-IRS Income Tax Returns

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. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023, must provide:

- A signed statement listing the sources of any 2023 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2023; and
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2023.

### Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 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:

#### **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

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

**D. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**

The student must appear in person at Samuel Merritt 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 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.

**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**

**(To Be Signed at the Institution)**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Samuel Merritt University for 2025-2026.

\_\_\_\_\_  
**Student's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Student's ID Number**

\_\_\_\_\_  
**Financial Aid Administrator** (Print Name)

\_\_\_\_\_  
**Financial Aid Administrator Signature**

\_\_\_\_\_  
**Date**

**D. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (Continued)**

**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE  
(To Be Signed in the Presence of Notary)**

If the student is unable to appear in person at **Samuel Merritt 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.

**STATEMENT OF EDUCATIONAL PURPOSE**

I certify that I, \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Samuel Merritt University for 2025-2026.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's ID Number

**NOTARY'S CERTIFICATE OF ACKNOWLEDGEMENT**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me \_\_\_\_\_,  
(Date) (Notary's name)

Personally appeared, \_\_\_\_\_, and provided to me  
(Printed Name of signer)

On basis of satisfactory evidence of identification \_\_\_\_\_  
(Type of unexpired government-issued ID provided)

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

**WITNESS my hand and official seal**



\_\_\_\_\_  
(Notary's Signature)

My Commission expires on \_\_\_\_\_  
(Date)