



## Santa Clara University Financial Aid Office

### 2025-2026 V5 Aggregate Verification Worksheet - Dependent

Your 2025-2026 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 and your parents 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 and at least one parent 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. Dependent 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. Dependent Student’s Family/Household Information**

1. List **everyone** in your parents’ household using the table below. Be sure to include everyone in your family/household from each of the four categories listed below as they apply to you:
- **Yourself.**
  - **Your parent(s).** Please list your **custodial** parent(s), including stepparents, even if you are not currently living with your custodial parents (such as living on your own while at school). You do not need to list non-custodial parent information.
  - **Your siblings, and all of your parent’s other children,** such as step-siblings, even if they are not claimed as dependents on your parents’ tax return or if they do not live with your parents, as long as: (a) your parents will provide more than half of their support from July 1, 2025 through June 30, 2026, or (b) the children would be required to provide parental information when applying for Federal Student Aid.
  - **Anyone else living in the household,** as long as they currently live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2026.
- \*\*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 **other than a parent** 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, 2025 and June 30, 2026.

Full Name	Age	Relationship	College	Will be enrolled at least half time
<i>(Example) Mycroft Holmes</i>	<i>20</i>	<i>Brother</i>	<i>Imperial College</i>	<i>Yes</i>
		<b>Self</b>	<b>Santa Clara University</b>	

### **C. Dependent STUDENT'S Income Information to be Verified**

#### **Section 1:**

**COMPLETE THIS SECTION IF YOU (THE STUDENT) FILED A TAX RETURN IN 2023.**

***\*\*If you did not file a tax return in 2023, please skip this section and go on to Section 2.***

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

- ☐ The student has used the Direct Data Exchange (FA-DDX) in *FAFSA on the Web* to transfer 2023 IRS income tax return information into the student's FAFSA.
- ☐ The student has not yet used the Direct Data Exchange (FA-DDX) in *FAFSA on the Web*, but will use the tool to transfer 2023 IRS income tax return information into the student's FAFSA.
- ☐ The student is unable or chooses not to use the Direct Data Exchange (FA-DDX) in *FAFSA on the Web*, and instead has attached to this worksheet either:
- a **signed** copy of the 2023 IRS income tax return and applicable schedules, **or**
  - a copy of the 2023 IRS Tax Return Transcript.

**How to obtain a 2023 IRS Tax Return Transcript:**

- Get Transcript 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" (**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](http://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 – [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:**

**COMPLETE THIS SECTION IF YOU (THE STUDENT) DID NOT FILE A TAX RETURN IN 2023, EVEN IF YOU WORKED AND EARNED INCOME:**

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

- ☐ The student was not employed and had no income earned from work in 2023.
- ☐ The student was employed in 2023 but did NOT file a tax return. *(Please follow instructions below.)*

Student name: \_\_\_\_\_ SCU ID: \_\_\_\_\_  
(Name as it appears on Santa Clara University student records)

**Students who were employed in 2023 but did not file a tax return**, please use the table provided below to list the names of all the student's employers and the amount earned from each employer in 2023.

- List every employer even if they did not issue an IRS W-2 form.
- Provide copies of all 2023 IRS W-2 forms issued to the student.
- If you are unable to provide your 2023 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 2023 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 2023:

Employer's Name	IRS W-2 Provided?	Annual Amount Earned in 2023
<i>(Example) Reichenback Falls Café</i>	<i>Yes</i>	<i>\$2,000</i>
Total Amount of Income Earned From Work		\$

#### **D. PARENT Income Information to be Verified**

*NOTE: If two parents were reported in Section B (Family/Household Information) of this worksheet, the instructions and certifications below refer and apply to both parents.*

##### **Section 1:**

##### **COMPLETE THIS SECTION IF PARENT(S) FILED A TAX RETURN IN 2023**

*\*\*If parent(s) did **not** file a tax return in 2023, please **skip** this section go on to Section 2*

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

- ☐ The student's parent(s) used the Direct Data Exchange (FA-DDX) in *FAFSA on the Web* to transfer 2023 IRS tax return income information into the student's FAFSA.
- ☐ The parents have not yet used the Direct Data Exchange (FA-DDX), but will use the tool to transfer 2023 IRS income tax return information into the student's FAFSA.
- ☐ The student's parent(s) are unable or choose not to use the Direct Data Exchange (FA-DDX), and instead have attached a **signed** copy of the parent(s) 2023 IRS Tax Return and applicable schedules or a copy of the 2023 IRS Tax Return Transcript to this worksheet.

Student name: \_\_\_\_\_ SCU ID: \_\_\_\_\_  
 (Name as it appears on Santa Clara University student records)

**How to obtain a 2023 IRS Tax Return Transcript** (Make sure to request the “Return Transcript” and **NOT** the “Account Transcript”).

- Get Transcript 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” (**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](http://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 – [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:

**COMPLETE THIS SECTION IF PARENT(S) DID NOT FILE A TAX RETURN IN 2023, EVEN IF THEY WORKED AND EARNED INCOME. CONFIRMATION OF NON-FILING DOCUMENT MUST ALSO BE PROVIDED.**

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

- ☐ The parent(s) were not employed and had no income earned from work in 2023.
- ☐ The parent(s) were employed in 2023 but did NOT file a 2023 IRS tax return. Parent(s) have listed below the names of all the parent’s employers and the amount earned from each employer in 2023.
- List every employer even if they did not issue an IRS W-2 form.
  - Provide copies of all 2023 IRS W-2 forms issued to the parent(s) by employer(s).
  - If the parents are unable to provide your 2023 IRS W-2 forms, they can request a [Tax Account Transcript](#). The transcript is generally received within 10 business days from the IRS’s receipt of your request.

Complete this table ONLY if your parent(s) worked but did NOT file a tax return in 2023:

Employer’s Name	IRS W-2 Provided?	Annual Amount Earned in 2023
<i>(Example) Arthur, Conan, &amp; Doyle</i>	<i>Yes</i>	<i>\$80,000</i>
Total Amount of Income Earned From Work		\$

**CONFIRMATION OF NON-FILING DOCUMENT FROM THE IRS:**

**Required for all parent(s) who did *not* file a tax return.**

All parent(s) who did not file a tax return in 2023 (parent non-filers) must provide documentation from the IRS (or other relevant tax authority) dated on or after October 1, 2023 that indicates a 2023 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.

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](https://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:** For parent(s) who did not file a tax return in 2023, failure to submit W-2 forms (if they worked) and a confirmation of non-filing document from the IRS or a signed statement will result in Santa Clara University being unable to complete the verification process. *If parent(s) are unable to obtain a W-2 or a confirmation of non-filing from the IRS, please contact our office for additional instructions.*

***\*\*please see next page for certification and signature\*\****

Student name: \_\_\_\_\_ SCU ID: \_\_\_\_\_  
(Name as it appears on Santa Clara University student records)

### **E. Certification and Signature**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent (who is listed on the FAFSA) must sign and date this form. ***\*\*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 Parent	Date
Parent's Signature	

Student name: \_\_\_\_\_ SCU ID: \_\_\_\_\_  
(Name as it appears on Santa Clara University student records)

**Identity and Statement of Educational Purpose**  
**(To Be Signed In Person 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.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing

(Print Student's Name as it appears on Santa Clara University student records)

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 SANTA CLARA UNIVERSITY for 2025–2026.

**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

\_\_\_\_\_  
Parent's Signature (Required)

\_\_\_\_\_  
Date

**FOR OFFICE USE ONLY**

Print Staff Member Name: \_\_\_\_\_

☐

Acceptable Documentation

Date Received \_\_\_\_\_

☐

Unacceptable Documentation

Staff Member Signature \_\_\_\_\_



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.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing this  
(Print Student's Name as it appears on Santa Clara University student records)

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 SANTA CLARA UNIVERSITY for 2025–2026.

**Certification and Signature – Sign with BLUE ink**

Each person signing below certifies that all of the information reported is complete and accurate.

**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

\_\_\_\_\_  
Parent's Signature (Required)

\_\_\_\_\_  
Date

Student name: \_\_\_\_\_ SCU ID: \_\_\_\_\_  
(Name as it appears on Santa Clara University student records)

**Notary's Certificate of Acknowledgement – Use 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)

**FOR OFFICE USE ONLY**

Print Staff Member Name: \_\_\_\_\_

☐

Acceptable Documentation

Date Received \_\_\_\_\_

☐

Unacceptable Documentation

Staff Member Signature \_\_\_\_\_