NEW MEXICO HIGHLANDS UNIVERSITY
OFFICE OF FINANCIAL AID AND SCHOLARSHIPS

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2025-2026 VERIFICATION WORKSHEET - INDEPENDENT (V1)

Please read the entire form, complete ALL sections, attach the requested documentation, sign the form, and return to the Office of Financial Aid and Scholarships. Federal regulations require that we complete verification before processing federal financial aid. If there are differences between the information submitted and your Free Application for Federal Student Aid (FAFSA) the school will make the necessary changes. Incomplete worksheets and documentation will cause delays in processing your financial aid. No determination of aid eligibility can be made until all documents are received and reviewed.

Student Information

_____ @_____
Last Name First Name M.I. Banner/NMHU ID

_____ _____
Phone Number (include area code) NMHU Email Address

Family Size- Includes the following:

- The student.
- The student's spouse, if applicable.
- The student's dependents children if the following are true:
  - They live with the student (or live apart because of college enrollments);
  - 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 requirements that family size align with who the student could claim as a dependent on the U.S. tax return if the student were to file a U.S. tax return at the time of the completing the 2025-2026. As a result, the student should not include any unborn children in the family size.

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

Full Name	Age	Relationship to Student
		Self

Student's Name: _____ Banner/NMHU ID @_____

STUDENT 2023 INCOME INFORMATION

Important Note: *The instructions below apply to the student and spouse (if the student is married). Notify the Office of Financial Aid and Scholarships if the student or spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.*

Verification of 2023 Income Information for Student Tax Filers

Instructions: Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA from, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to shar and import income and tax information from the IRS. 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 form the IRS.

Check the box that applies:

- ☐ The student has used the Future Act Direct Data Exchange (FADDX) in FAFSA on the Web to transfer 2023 IRS income tax return information into the student's FAFSA.

- ☐ The parents have not yet used the FADDX in FAFSA on the Web, but will use the tool to transfer 2023 IRS income tax return information into the student's FAFSA.

- ☐ The parents are unable or choose not to use the FADDX in FAFSA on the Web, and instead will provide the institution with a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules**.

If 2023 income tax return information for the parents were not available or could not be used, the parents should provide the institution with a **2023 IRS Tax Return Transcript(s) or a signed copy off the 2023 income tax return and applicable schedules.**

A 2023 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.

If the student and spouse filed separate 2023 IRS income tax returns, the F cannot be used and the **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and application schedules** must be provided for each.

- ☐ Check here if a **2023 IRS Tax Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules** is provided.

- ☐ Check here is a **2023 IRS Tax Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules** is will be provided later.

Student's Name: _____ Banner/NMHU ID @_____

Verification of 2023 Income Information for Student Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2023 income tax return with the IRS.

Check the box that applies:

☐ The student and spouse were not employed and had no income earned from work in 2023.

☐ The student and/or spouse were 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. [Provide copies of all 2023 IRS W-2 forms issued to the student]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 or an Equivalent Document Provided by Employer?	Annual Amount Earned in 2023
(Example) ABC's Auto Body Shop	Yes	$4,500.00
		$
		$
Total Income Earned from Work		$

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 confirmation of non-filing or a signed statement is provided.
☐ Check here if confirmation of non-filing or a signed statement will be provided later

Individuals Granted a Filing Extension by the IRS

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:

▪ Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;

▪ A **2023 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 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Student's Name: _____ Banner/NMHU ID @_____

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 DataBase 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.

A. <u>Certifications and Signatures</u>

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

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

_____ @_____
Print Student's Name Banner/NMHU I.D.

_____ _____
Student's Signature (Required) Date

_____ _____
Spouse's Signature (Optional) Date