




# 2024-2025 Tax / Income Verification Independent Student

Your FAFSA was selected for a review process called verification. Student Financial Services (SFS) is required to compare your FAFSA to the information provided on this form and make necessary adjustments to finalize your financial aid. For questions, contact SFS at 814-824-2288 or sfsverif@mercyhurst.edu. Visit [mercyhurst.edu/financial-aid/fafsa-verification](https://mercyhurst.edu/financial-aid/fafsa-verification) for more information.

<b>Options to submit forms and documents:</b>	Mail: Mercyhurst University Student Financial Services 501 East 38th Street Erie, PA 16546	Email: <a href="mailto:sfsverif@mercyhurst.edu">sfsverif@mercyhurst.edu</a>  Fax: 814-824-2072 (Redact SSN and banking information.)	Upload to Self Service Portal: Visit <a href="https://mhur.st/DOCS">mhur.st/DOCS</a> or scan the QR code. (Student's Mercyhurst credentials required for login.)	

**Allow 2-3 weeks processing time after ALL forms and documents are received.**

## STUDENT INFORMATION

Last Name	First Name	MI	Mercyhurst ID or Last 4 of SSN
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**? Did the student file, plan to file, or was required to file an income tax return for the 2022 tax year?**

- If **YES**, complete the **TAX FILER** box to indicate how the tax information will be provided to SFS.
- If **NO**, the student did NOT, will NOT, and was NOT required to file, complete the **NON-TAX FILER** box.

### TAX FILER - STUDENT

 Indicate how the student will provide 2022 tax information to SFS.

- I provided consent and approval to successfully **disclose my federal tax information** (FTI) on my FAFSA.
- I am attaching a **signed and dated** copy of my **2022 IRS Form 1040 Income Tax Return** (including schedules 1, 2, and 3 if applicable). If a copy is not available, a free 2022 Tax Return transcript can be requested online at [irs.gov/individuals/get-transcript](https://irs.gov/individuals/get-transcript) or by calling 1-800-908-9946.
- I have a **unique tax situation** and have attached the appropriate documents.  
A list of required documents can be found at [mercyhurst.edu/financial-aid/fafsa-verification](https://mercyhurst.edu/financial-aid/fafsa-verification).

### NON-TAX FILER - STUDENT

 Complete the information below and provide W2s, if applicable.

**YES**     **NO**    Did you work at all in 2022? (Any type of work where you earned money.)

If **"YES"**, provide copies of all W2s received from your employer(s).

If you did NOT receive a W2 from your employer(s), complete the chart below.

<u>Employer's Name</u>	<u>2022 Amount Earned</u>

**NON-FILING CERTIFICATION** By signing below, I certify I did not file and was not required to file a 2022 federal tax return.

Student Signature: \_\_\_\_\_ Student Printed Name: \_\_\_\_\_

## SPOUSE INFORMATION



Did the student's spouse file, plan to file, or were required to file an income tax return for the 2022 tax year?

- If **YES**, complete the **TAX FILER** box to indicate how the tax information will be provided to SFS.
- If **NO**, the student's spouse did NOT, will NOT, and was NOT required to file, complete the **NON-TAX FILER** box.

### TAX FILER – STUDENT'S SPOUSE

Indicate how the student's spouse will provide 2022 tax information to SFS.

- I provided consent and approval to successfully **disclose my federal tax information** (FTI) on my FAFSA.
- I am attaching a **signed and dated** copy of my **2022 IRS Form 1040 Income Tax Return** (including schedules 1, 2, and 3 if applicable). If a copy is not available, a free 2022 Tax Return transcript can be requested online at [irs.gov/individuals/get-transcript](https://irs.gov/individuals/get-transcript) or by calling 1-800-908-9946.
- I have a **unique tax situation** and have attached the appropriate documents.  
A list of required documents can be found at [mercyhurst.edu/financial-aid/fafsa-verification](https://mercyhurst.edu/financial-aid/fafsa-verification).

### NON-TAX FILER – STUDENT'S SPOUSE

Complete the information below and provide W2s, if applicable.

**YES**     **NO**    Did you work at all in 2022? (Any type of work where you earned money.)

If **"YES"**, provide copies of all W2s received from your employer(s).

If you did NOT receive a W2 from your employer(s), complete the chart below.

Employer's Name

2022 Amount Earned

**NON-FILING CERTIFICATION** *By signing below, I certify I did not file and was not required to file a 2022 federal tax return.*

Spouse Signature: \_\_\_\_\_

Spouse Printed Name: \_\_\_\_\_

## CERTIFICATION AND SIGNATURES

Each person signing this worksheet certifies that all the information reported 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, sentenced to jail, or both.**



Acceptable signatures include blue or black ink, an electronic signature using a stylus or finger, or an image of the individual's signature affixed to the form. Typed signatures using font text will NOT be accepted.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Date