

C. Dependent Student's Income Information To Be Verified

TAX RETURN FILERS — **Important Note:** If the student filed, or will file, an amended 2023 IRS tax return, a non-IRS Income Tax Return, was granted a filing extension by the IRS, or was the victim of IRS tax-related identity theft they must contact the Office of Financial Aid before completing this section.

Instructions: Complete this section if the student filed or will file a 2023 IRS income tax return. As part of federal student aid eligibility, students 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. In other words, if the student filed a 2023 IRS income tax return, the student must provide consent and approval to share 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 from the IRS via the FA-DDX.

If 2023 income tax return information for the student was not transferred via the FA-DDX and considered verified, the student should provide the institution with the following:

☐

A 2023 IRS Tax Return Transcript, or a signed copy of 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.

Student Name: _____

SSN (Last Four Digits) _____

TAX RETURN NON-FILERS— By completing this section, you certify that you have **not filed** and are **not required** to file a 2023 income tax return, and you have listed all income earned from work, other income, and resources for the 2023 tax year.

Check the box that applies:

- ☐ The student was not employed and had no income earned from work in 2023.
- ☐ The student was employed in 2023 and has 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. Copies of all 2023 IRS W-2 forms issued to the student by employers must be provided. 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?	Annual Amount Earned in 2023
<i>(Example) ABC's Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

- ☐ The student had other income and resources that supported them for the 2023 tax year. *List each source of income in the table below. If more space is needed, provide a separate page with the student's name and ID number at the top.*

Source of Income	Annual Amount in 2023
<i>(Example) Rental Property</i>	<i>\$4,500.00</i>
Total Amount of Income	\$

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2024 that indicates a 2023 IRS income tax return was not filed with the IRS or other relevant tax authority. An official IRS Letter of Non-Filing can be obtained at [irs.gov](https://www.irs.gov). If unable to obtain a Letter of Non-Filing, 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 (listed above).

_____ **Check here if IRS confirmation of non-filing, or signed and dated statement is provided.**

D. Parent(s) Income Information To Be Verified

TAX RETURN FILERS — **Important Note:** If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

Parent's Current Marital Status (Please check one):

Single: _____ Married/Remarried: _____ (Date: _____) Separated: _____ (Date: _____)

Divorced: _____ (Date: _____) Widowed: _____ (Date: _____)

Important Note: If the parent(s) filed, or will file, an amended 2023 IRS tax return, a non-IRS Income Tax Return, was granted a filing extension by the IRS, or was the victim of IRS tax-related identity theft they must contact the Office of Financial Aid before completing this section.

Instructions: Complete this section if the parents filed or will file a 2023 IRS income tax return(s). As part of federal student aid eligibility, 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. 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. 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 via the FA-DDX.

If 2023 income tax return information for the parents was not transferred via the FA-DDX and considered verified, the parents should provide the institution with the following:

☐ **A 2023 IRS Tax Return Transcript(s) or a signed copy of 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.

PARENT(S) TAX RETURN NON-FILERS— The instructions and certifications below apply to each parent listed in Section B, page 1 of this document. By completing this section, you certify that **neither parent has filed nor is required to** file a 2023 income tax return, and all their income earned from work, other income, and resources for the 2023 tax year are listed below.

Check the box that applies:

- ☐ Neither parent was employed and neither had income earned from work in 2023.
- ☐ One or both of the parent(s) was employed in 2023 and has 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. Copies of all 2023 IRS W-2 forms issued to the parent(s) by their employers must be provided. 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?	Annual Amount Earned in 2023
<i>(Example) ABC’s Auto Body Shop</i>	<i>Yes</i>	<i>\$4,500.00</i>
Total Amount of Income Earned From Work		\$

- ☐ One or both parents had other income and recourses that supported them for the 2023 tax year. *List each source of income in the table below. If more space is needed, provide a separate page with the student’s name and ID number at the top.*

Source of Income	Annual Amount in 2023
<i>(Example) Rental Property</i>	<i>\$4,500.00</i>
Total Amount of Income	\$

You must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2024 that indicates a 2023 IRS income tax return was not filed with the IRS or other relevant tax authority. An official IRS Letter of Non-Filing can be obtained at [irs.gov](https://www.irs.gov). If unable to obtain a Letter of Non-Filing, 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 (listed above).

_____ Check here if IRS confirmation of non-filing, or signed and dated statement is provided.

Student Name: _____

SSN (Last Four Digits) _____

E. Identity and Statement of Educational Purpose - Must be signed at the Institution or in the presence of a Notary

OPTION #1 - TO BE SIGNED AT THE INSTITUTION

Student Name (please print)

Phone Number (including area code)

Student ID Number

The student must appear in person at Cleary University's Financial Aid Office, 3750 Cleary Dr, or a Cleary University affiliate office, to verify their 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 annotated by the institution with the date it was received and reviewed, the name of the authorized official at the institution, and their signature verifying the student's ID was reviewed.

Cleary Official: Place ID in this box when copying

Original and Valid ID must be presented to a Cleary Official

Student Signature

Date

Student ID#

Name of Authorized Individual

Signature of Authorized Individual

Student Name: _____

SSN (Last Four Digits) _____

OPTION #2 – TO BE COMPLETED WITH A NOTARY

Student Name (please print)

Phone Number (including area code)

Student ID Number

If the student is unable to appear in person at Cleary University, 3750 Cleary Dr, to verify their identity, the student must provide the institution:

(a) A legible 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 certify below:

I certify that I (Print Student's Name) _____ am the individual signing this Proof of Identity form and that the Federal student financial assistance I may receive will only be used for educational purposes associated with attending Cleary University for 2025-2026.

Student Signature

Date

Student ID Number

*****Notary's Certificate of Acknowledgement*****

State of: _____ City/County of: _____

On (Date) _____ before me, (Printed Name of Notary) _____

personally appeared, (Printed Name of Signer) _____ and proved to me on basis of

satisfactory evidence of photo identification (Type of government 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) _____

Student Name: _____

SSN (Last Four Digits) _____

G. Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

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

Print Student's Name

(Blue or black ink, no electronic signatures accepted)

Student's Signature

(Blue or black ink, no electronic signatures accepted)

Date

Parent's Signature

(Blue or black ink, no electronic signatures accepted)

Date

Submit the original worksheet to the financial aid administrator at your school.

No copies will be accepted.

You should make a copy of this worksheet for your records.