University of South Carolina Beaufort
Financial Aid/Veterans Affairs Office
801 Carteret Street, Beaufort, SC 29902
Office: 843-521-3104 **Fax:** 843-521-3194 www.uscb.edu
Email: uscbfina@uscb.edu

2026 – 2027 Independent Verification Worksheet

Your 2026-2027 Free Application for Federal Student Aid (FAFSA) has been selected for a review process called **verification**. Verification must be completed before federal financial aid can be awarded. Federal financial aid will be awarded upon completion of the entire verification process. Please complete and sign this form, attach any required documents, and submit it to the address, fax, or email above. **Blank or incomplete forms will not be processed**. If you have questions about the process, you can contact our office.

For your protection, please remove all personally identifiable information (PII) such as: SSN, date of birth, and driver's license number from your documents prior to submitting them. Also, please include the student's name and VIP ID on all documents.

Section A: Student Information

_____ _____
Last Name First Name Middle Name Student VIP ID

_____ _____
Email Address Cell or Alternate Phone Number

Section B: Family Size

List the people in your household, including:

- yourself (and your spouse, if married),
- your dependent children if they will receive more than half of their support from you from July 1, 2026, through June 30, 2027 even if they do not live with you, and
- other people who live with and will receive more than half of their support from you and will receive more than half support for the entire award year.

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

Full Name	Age	Relationship
		Self

Section C: Student/Spouse Tax Forms and Income Information

☐ **I/we are attaching all student/spouse (if applicable) 2024 W2s**

1. **STUDENT/SPOUSE TAX FILERS:** You must check at least one of the following. Please refer to instructions listed on Page 3.
   - ☐ Consent and approval were given to share and import income and tax information from the IRS to the FAFSA
   - ☐ Consent and approval were given to share and import income and tax information from the IRS to the FAFSA form **but** were not successful and the 2023 tax information was input manually. **Provide one of the following:**
     - A signed copy of the 2024 Federal 1040 Tax Return and schedules 1,2,3, C or K if applicable
     - A 2024 IRS Tax Return Transcript
2. **STUDENT/SPOUSE NON-TAX FILERS*:** ***Federal guidelines require students (and their spouses if married) to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2025, if they did not file a 2024 federal tax return.***
   - ☐ I am attaching an **IRS Verification of Non-filing Letter** dated on or after Oct 1, 2025
   - ☐ I attempted to obtain the Verification of Non-filing Letter and was not able to obtain the required documentation from the IRS. List the date attempted: _____

   Complete the section below and attach a copy of the W-2 form for each source of employment. Misplaced W-2s must be requested from your employer(s) or the IRS.

   ***Sign here to certify that you DID NOT and ARE NOT required to file a 2024 U.S. Federal Tax Return:**

   _____ _____

   Student's Signature (Required) **Date**

3. **STUDENT'S SPOUSE NON-TAX FILER*:** ***Federal guidelines require students (and their spouses if married) to obtain an IRS Verification of Non-filing Letter dated on or after October 1, 2025, if they did not file a 2024 federal tax return.***
   - ☐ I, the student's spouse, am attaching an IRS Verification of Non-filing Letter dated on or after Oct 1, 2025
   - ☐ I, the student's spouse, attempted to obtain the Verification of Non-filing Letter and was not able to obtain the required documentation from the IRS. List the date attempted: _____

   Complete the section below and attach a copy of the W-2 form for each source of employment. Misplaced W-2s must be requested from your employer(s) or the IRS.

   ***Sign here to certify that you DID NOT and ARE NOT required to file a 2024 U.S. Federal Tax Return:**

   _____ _____

   Spouse's Signature (Required if a non-tax filer) **Date**

4. **STUDENT TAX FILERS & NON-TAX FILERS:**
   All students (and their spouses if married) are required to submit copies of all 2022 W-2(s), along with the rest of the required documentation.

Section D: Certification and Signatures

Each person signing this worksheet certifies that all the information reported is true and accurate.

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail or both.

_____ _____

Student's Signature Date Spouse's Signature (optional) Date

Verification of 2024 Income Information for Student Tax Filers

Important Note: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2024 or had a change in marital status after December 31, 2024.

Instructions: 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 form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2024 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS.

If 2024 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student/spouse should provide the institution with a **2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules**.

A 2024 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." Sign in with an existing account or create a new account. Make sure to request the "Return Transcript" and NOT the "Account Transcript."
- Automated Telephone Request – 1-800-908-9946. The 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.

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, **and**
- A statement signed and dated by the tax filer indicating they were a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

If you are unable to obtain a TRDVB, the following must be provided

- A signed copy of the 2024 income tax return and applicable schedules the individual filed with the IRS; **and**
- An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.

CHECKLIST* – Review the checklist to ensure you have provided our office with all required documents for the verification to be completed.

- ☐ ***Student 2024 W2s, 2024 Tax Information.***
- ☐ ***Spouse(if applicable) 2024 W2s, 2024 Tax Information.***
- ☐ ***Copies of Schedule(s) 1, 2, 3, C and/or K if applicable***
- ☐ ***All sections are complete (Sections A, B, C, D & E).***
- ☐ ***All necessary signatures are provided.***

- **The University has the authority to request additional documentation, if necessary when processing the student's verification.**