

Student Name: _____ UID: _____

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Section D: Untaxed Distributions – IRAs, Pensions, Annuities (2023 IRS Form 1040, Lines 4a and 5a minus 4b and 5b)

Student

(Both student and spouse, if taxes filed jointly)

Spouse

(If taxes are filed separately)

☐ No IRA, Pension, Annuity Rollover

☐ No IRA, Pension, Annuity Rollover

☐ Yes, IRA, Pension, Annuity Rollover \$ _____

☐ Yes, IRA, Pension, Annuity Rollover \$ _____

Section E: Tax Filing Information for 2023

Student must complete this section

☐ Student filed a 2023 tax return. Submit one of the following types of tax documentation and continue spouse information.

- Use Direct Data Exchange already provided on the 2025-2026 FAFSA
- Send a copy of the 2023 Federal IRS Tax Return Transcript
- Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1 & 3

☐ The student did not file AND was not required to file a 2023 income tax return with the IRS.

NOTE: By completing this document, you certify that you have not filed and are not required to file a 2023 income tax return, and have listed all income earned from work, other income, and resources for the 2023 tax year. Non-tax filers must check and complete the following box(es) that apply.

☐ Student was not employed and had no income earned from work in 2023.

☐ Student was employed in 2023 but did not file a tax return. List all employers and the amount earned from each employer in 2023. **Include a copy of the IRS W-2 form or equivalent document.** List every employer, even if they did not issue a W-2.

Employer's Name	IRS W-2 or an Equivalent Provided?	Annual Amount Earned in 2023

☐ Student had other income and resources for support during the 2023 tax year but did not file a tax return. List each source of income and the annual amount received in 2023.

Source of Income	Annual Amount in 2023

2023 student income

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Spouse Section

2023 Spouse Income

☐ There is no spouse in the household

☐ Spouse filed a 2023 tax return. Submit one of the following types of tax documentation.

- Use Direct Data Exchange already provided on the 2025-2026 FAFSA
- Send a copy of the 2023 Federal IRS Tax Return Transcript
- Send hand-signed, 2-page copy of Federal IRS Form 1040 Tax Return; include schedules 1 & 3

☐ The student's spouse did not file AND was not required to file a 2023 income tax return with the IRS.

NOTE: By completing this document, you certify that you have not filed and are not required to file a 2023 income tax return, and have listed all income earned from work, other income, and resources for the 2023 tax year. Non-tax filers must check and complete the following box(es) that apply.

☐ Student's spouse was not employed and had no income earned from work in 2023.

☐ Student's Spouse was employed in 2023 but did not file a tax return. List all employers and the amount earned from each employer in 2023. **Include a copy of the IRS W-2 form or equivalent document.** List every employer, even if they did not issue a W-2.

Employer's Name	IRS W-2 or an Equivalent Provided?	Annual Amount Earned in 2023

☐ Student's Spouse had other income and resources for support during the 2023 tax year but did not file a tax return. List each source of income and the annual amount received in 2023.

Source of Income	Annual Amount in 2023

Tips for Completing the Verification Worksheet

Verification is a process required by the U.S. Department of Education to confirm that the information reported on the FAFSA is accurate. The U.S. Department of Education randomly selects students for this process. The Office of Financial Aid begins verifying FAFSA information after receiving all requested forms and documentation.

See the Verification Worksheet for the corresponding sections B, D, and E below.

Section B. Student/Spouse Family Size Information:

- When determining if you provide more than half support for dependent children or other persons, support includes housing, utilities, cell service, transportation, food, clothing, medical, childcare, and personal expenses.
- Do not include foster children for whom the parent(s) received a 50% or more subsidy.

Section D: Untaxed Distributions from IRAs, Pensions, Annuities

Untaxed IRA Distributions = 2023 IRS Tax Form 1040 (line 4a minus line 4b)

Untaxed Pensions and Annuities = 2023 IRS Tax Form 1040 (line 5a minus line 5b)

NOTE: If the student's and/or spouse's tax return(s) show a ROLLOVER for all or part of the untaxed amount (calculated above), check the box for IRA/Pension Rollover on the Verification Worksheet and add the rolled over amount to the worksheet.

Section E: FAFSA Requirements for the Student and/or Spouse Who DID FILE a 2023 Tax Return

Provide official tax information → 3 options:

- 1.) Use the Direct Data Exchange on the FAFSA to transfer tax information
- 2.) Obtain the *IRS Tax Return Transcript for 2023 and submit a copy to Enrollment Services
- 3.) Submit a copy of the 2023 tax return, Form 1040, that was filed with the IRS
 - ✓ Requires taxpayer signature or signature/credentials of a tax professional who prepared the return
 - ✓ Must also submit copies of Schedules 1 & 3, if any of them were used for the tax return

Section E: FAFSA Requirements for the Student and/or Spouse Who DID NOT FILE a 2023 Tax Return

Student/spouse who earned money from work in 2023 but did not file a tax return:

Sometimes wage earners do not earn enough to require them to file a tax return, or their income is not taxable.

For earnings from work → two steps:

- 1.) Must provide copies of all W-2s for 2023 (or the IRS Wage & Income Transcript)
- 2.) On the Verification Worksheet, list the names of all employers and amounts earned for 2023, even if the employer did not issue a W-2.

RESOURCES

*IRS Tax Transcripts Wage & Income Transcript	Order the Tax Return Transcript, Tax Account Transcript, IRS Verification of Non-Filing, and Wage and Income Transcript for W-2s https://www.irs.gov/individuals/get-transcript
Financial Aid Dashboard on Wings	Track verification status on student's Financial Aid Dashboard on WINGS. The student will be contacted if more information is needed.
Deadline and Processing Timeframes	https://www.wright.edu/enrollment-services/financial-aid/important-dates