

A. Student Information

Last Name: _____

First Name: _____ M.I. _____

Middlesex College ID Number: _____

Phone Number: _____

B. Family Information

List the people you considered to be in your household. If you need more space, attach a separate page. Include:

- Yourself and your spouse (person to whom you are legally married).
- If you are currently separated or divorced, then do not list your spouse.
- Your children under the age of 24 (if you and your current spouse will provide **more than half of their support from July 1, 2025 through June 30, 2026**) - Include all of your children that meet this standard, even if they do not live with you.
- Other people living with you (if you and your current spouse provide **more than half of their support and will continue to provide more than half of their support from July 1, 2025 through June 30, 2026**)
- If you have other children over the age of **23** or other family members you and your current spouse are providing **more than half of their support** to, you can also include them as part of the household. However, you must **provide a written statement explaining how you and your current spouse are providing more than half of their support***. **Failure to provide a statement will result in removal of the members from the household size and number in college if required**

Write in the college name for any household member who will be attending college at least half-time between July 1, 2025 and June 30, 2026 and will be enrolled in a degree or certificate program.

Full Name of Family Member	Age	Relationship	College
		Self	Middlesex College

Name: _____

Middlesex College ID Number: _____

C. 2023 Income Tax Return Filing Status

Important Instructions for Tax Filers (In order to complete verification, you have two options from which to choose to provide tax filing information.)

Option 1: Complete Verification Electronically

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 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.

Option 2: Complete Verification by Paper

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

Student	Spouse	Check any that apply
☐	☐	Already filed – Check if you and/or your spouse have already filed a 2023 U.S. Income Tax Return or a foreign tax return.
☐	☐	Option 1 – Check here if you used the FUTURE Act Direct Data Exchange (FA-DDX) Tool on the FAFSA and will not submit 2023 IRS Tax Return Transcript(s).
☐	☐	Option 2 – Check here if you and/or your spouse are submitting a signed copy of the 2023 Tax Return Transcript(s) to our office with this verification worksheet form.
☐	☐	Filed a 2023 Foreign Tax Return – You must submit a copy and an English translation to our office.

D. Did Not File a Tax Return in 2023

Student	Spouse	Check any that apply
☐	☐	Will Not File and Did Not Work – Check here if you and/or your spouse are not required to file a 2023 income tax return, and you had no income earned from work in 2023.
☐	☐	Will Not File but did Work – Check here if you and/or your spouse did work in 2023, but you will not and are not required to file a tax return. (If you will not file a tax return but did work, then you must complete the table below, attach all W2's and/or 1099's received from all employers. If you have misplaced your W-2 or never received one then you must obtain a "Wage and Income Transcript" from the IRS. If the "Wage and Income Transcript" does not reflect your wages, submit a signed/dated written statement explaining how much you earned in 2023. If you are unable to obtain a wage and income statement, submit a signed statement explaining the reason(s) for missing W-2's and submit to our office.

Names of 2023 Employers	Student Earned - 2023	Spouse Earned - 2023

E. Sign This Worksheet

By signing this worksheet, you certify that all information reported on this worksheet is complete and accurate. If you purposely give false or misleading information, you may be fined, sentenced to jail, or both

Student Signature: _____ Date: _____

Spouses Signature (optional): _____ Date: _____