



# Overview of Verification

March 20, 2025



Verification of FAFSA data

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Tracking Groups

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Documentation

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Corrections, Updates,  
Adjustments

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Professional Judgement

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Deadlines  
Resources

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# Verification of FAFSA Data

- REGULATIONS DEFINE WHICH APPLICATIONS, DATA ELEMENTS, AND DOCUMENTATION
- VERIFICATION APPLIES TO RECIPIENTS OF TITLE IV AID

Federal Pell  
Grant  
(includes  
IASG)

Federal  
Supplemental  
Educational  
Opportunity  
Grant  
(FSEOG)

Federal  
Work-Study  
(FWS)

Direct  
Subsidized  
Loans

Dear  
Colleague  
Letter (DCL)

# Required Data for Selected Applications

September 4, 2024

Federal Register (requirements).

PUBLICATION DATE: September 04, 2024

DCL ID: GEN-24-10

SUBJECT: 2025–2026 Award Year: FAFSA Information to be Verified and Acceptable Documentation

SUMMARY: This letter provides information that supplements the 2025–2026 award year verification information provided in the Federal Register notice published on September 4, 2024.

Dear Colleague:

On September 4, 2024, we published a *Federal Register* notice [89 FR 71893](#)  announcing the 2025–2026 *Free Application for Federal Student Aid* (FAFSA®) verification items for applicants selected by the Department as well as the acceptable documentation for those items.

This Dear Colleague Letter (DCL) summarizes and explains the changes in the verification process for the 2025–2026 award year. Additionally, at the end of this DCL, we have provided suggested text that an institution may use to fulfill its regulatory verification requirements.

**Changes for the 2025–2026 Award Year**

Applications are selected to ensure:

- Accuracy
- Validity
- Equity

# Required Data for Selected Applicants

## Changes

- No changes IF FTI was successfully transferred

## IRS Identity

- TRDBV no longer needed
- Submit signed 2023 tax return transcript
- IRS 4674C or signed and dated statement

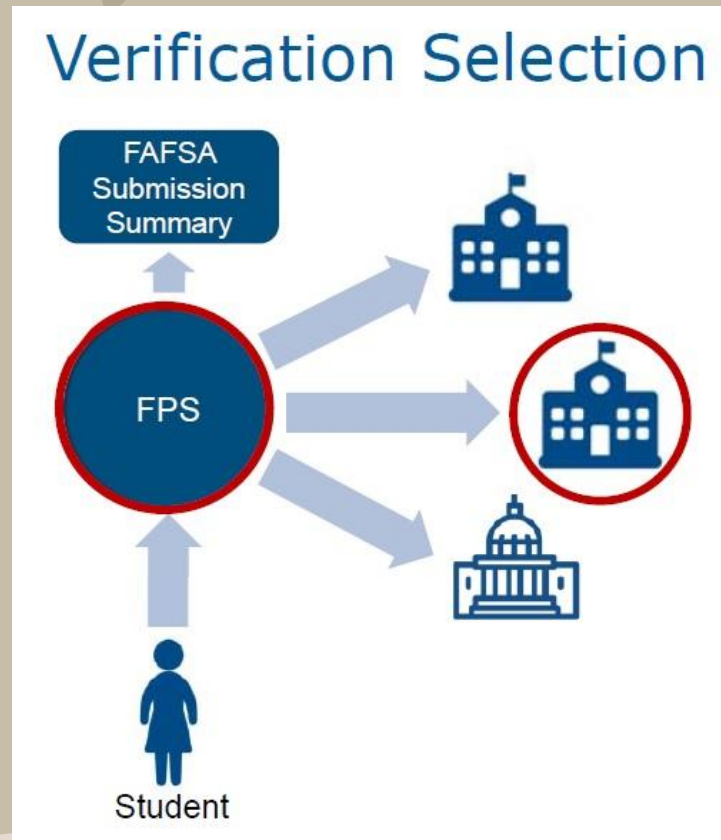
## Confined or Incarcerated

- VI not required to be verified
- V4 – Statement of Educational Purpose still required
- V5 – only the Statement of Education Purpose still required

## Verification Text

- Suggestions only
- Statement of Educational Purpose

# Verification Selection



- Selection by:
  - FAFSA processing (FPS)
  - School
- U.S. Department of Education (ED) uses a customized approach
- May be information not used in SAI calculation

# Conflicting Information

- Must be resolved for all award years, even prior ones
- Beyond verification requirements, conflicting information does not need to be resolved if:
  - Does not affect student's student aid index (SAI) or Title IV eligibility
  - Student dies during award year; or
  - Conflicting data are received after student is no longer enrolled and does not intend to re-enroll at the school
- Includes correcting nondollar items, whether result of verification or resolution of conflicting information
- School decides appropriate documentation

# Verification Tracking Groups

## VI

- Tax income
- Nontax filer income
- Family Size

## V4

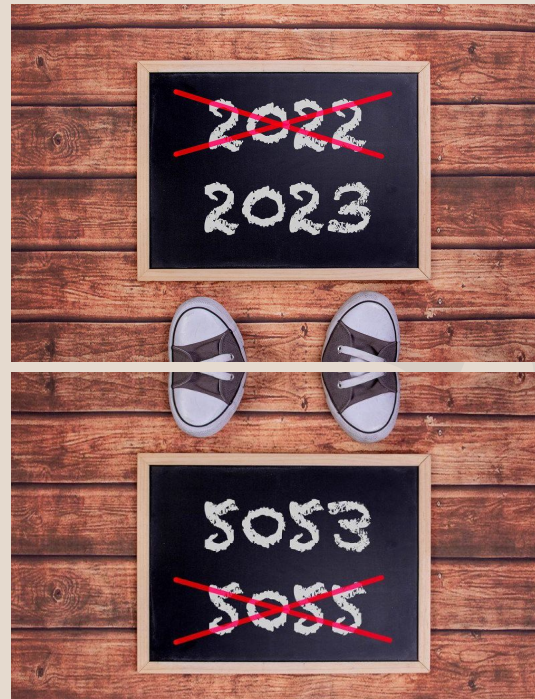
- Statement of Educational Purpose signed by the student

## V5

- Tax income
- Nontax filer income
- Family Size
- Statement of Educational Purpose

# Documentation

- Successful IRS transfer on FTI
- Must complete verification using actual filed tax return data unless the individual has IRS-approved tax filing extension
- Specified year is prior-prior year (PPY)
  - For 2025-2026, specified year is 2023

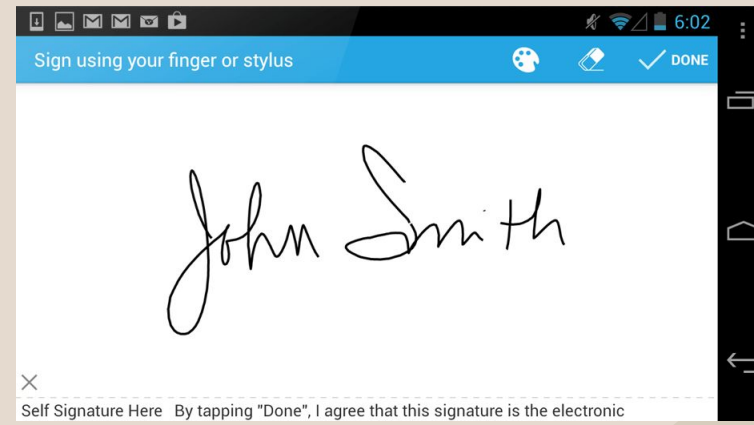


# Acceptable Signature Formats

- Physical Signatures
- Stylus or finger signatures
- Pictures of physical signature
- Electronic signature
  - E-sign Act
  - Gen 01-06

## Not acceptable signature

- Form 8879 IRS e-file signature authorization on taxes



# Statement of Educational Purpose



- Must be presented in person at the same time to school-designated official or to notary
- Confined or incarcerated students:
  - Signed statement from an authorized official who works for the correction facility or the oversight entity confirming to the school that the individual who completed the FAFSA form was selected for verification and is the person signing the form.

**Identity and Statement of Educational Purpose  
(To Be Signed at the Institution)**

The student must appear in person at \_\_\_\_\_ to  
(Name of Postsecondary Educational Institution)

verify his or her 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 that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

**Identity and Statement of Educational Purpose  
(To Be Signed in the Presence of a Notary)**

If the student is unable to appear in person at \_\_\_\_\_  
(Name of Postsecondary Educational Institution)

to verify his or her identity, the student must provide to the institution:

(a) A 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

(b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

**Statement of Educational Purpose**

I certify that I \_\_\_\_\_ am the individual signing  
(Print Student's Name)

this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ for 2024–2025.  
(Name of Postsecondary Educational Institution)

\_\_\_\_\_  
(Student's Signature) (Date)

\_\_\_\_\_  
(Student's ID Number)

# Corrections

- All incorrect verification data must be corrected
- If eligible for subsidized (e.g., Pell, Loan, FSEOG) only the following corrections must be sent to FPS for reprocessing:
  - Any single dollar item change of \$25 or more
  - Any nondollar verification item change (e.g., family size)

# Updates

- Dependency status must be updated throughout award year
- Family size must be updated at time of verification

# Adjustments

- Discretion granted to FAAs under section 479A(a) of Higher Education Act of 1965 (HEA), as amended
- Case-by-case basis due to documented special or unusual circumstance
- Cannot have a policy to deny all PJ requests and must consider all such requests

# Verification Deadlines

Institutional  
Deadline

Federal  
Grant  
Deadline

Campus-Bas  
ed and  
Direct Loan  
deadlines

# Resources



2025-2026 verification – NASFAA on-demand (requires membership)



2025-2026 application and verification guide master (iFAP)



NASFAA  
AskRegs