![Potsdam - State University of New York]

VI-D27

2026 – 2027 DEPENDENT VERIFICATION WORKSHEET

SUNY Potsdam Financial Aid • 44 Pierrepont Avenue • Potsdam, NY 13676
{315} 267-2943 • Toll-Free: {877} POTSDAM • finaid@potsdam.edu

Student Name: _____ Potsdam ID: _____

INSTRUCTIONS: Complete all four parts of this worksheet and submit to the Financial Aid office. All documents must be submitted before verification review can begin. Your federal financial aid is not confirmed until verification is complete. **Read instructions carefully and include all required documentation. Documents need to be uploaded to our secure file drop location.**

PART I: VERIFICATION OF HOUSEHOLD

See "Is my parent a contributor when I fill out my FAFSA form sheet below if you are unsure whose information to report.

Contributing Parent - Current Marital Status (Check only one option):

Marital Status
◯ Married
◯ Remarried
◯ Separated (not temporary)
◯ Divorced
◯ Widowed
◯ Unmarried and living together
◯ Never Married

Complete Each Column List the members of your household, as indicated. Use a separate sheet if necessary.

- ✓ Yourself (even if you don't live with your parent)
- ✓ Your parent(s), (including their spouse or partner)
- ✓ Your parent's other children **IF** your parent will provide more than half of their financial support between **7/1/2026 and 6/30/2027** (even if they are not currently living with your parent(s))
- ✓ Other people **IF** they live with your parent(s) **AND** your parent(s) will provide more than half of their financial support between **7/1/2026 and 6/30/2027**

Full Name of Household Member	Date of Birth	Relationship to Student
		Self

Student Name: _____ Potsdam ID: _____

PART II   VERIFICATION OF STUDENT NCOME

Did you file an IRS income tax return or another tax return for the year 2024?

	INCOME INFORMATION - STUDENT
	Check one box and attach the required documentation:
If No	◯ I did NOT work at all in the year 2024. I had no 2024 income so I did not file a 2024 tax return because I was not required to. <u>Required Documentation</u>: None. ◯ I did work in the year 2024. I did NOT file a 2024 tax return because I am not required to. <u>Required Documentation</u>: Submit copies of all your 2024 federal W-2 income statements.
If Yes	I will submit the following as required documentation of my tax filing: ◯ I used the Direct Data Exchange (FA-DDX) to directly import income information into the FAFSA. <u>Required Documentation</u>: None. ◯ <u>Required Documentation</u>: I did not use the FA-DDX. I will request and submit an IRS 2024 "Tax Return Transcript" (see page 3); **OR** I will submit a signed 2024 federal tax return.

PART II   VERIFICATION OF PARENT NCOME

Did your parent(s) file an IRS income tax return or another tax return for the year 2024?

	INCOME INFORMATION - PARENT{S)
	Check one box and attach the required documentation:
If No	◯ My parent(s) did NOT work at all in the year 2024. <u>Required Documentation</u>: Submit a confirmation of non-filing from the IRS {see page 3). ◯ My parent(s) did work in the year 2024 but did NOT file a 2024 tax return. <u>Required Documentation</u>: Submit copies of all your parents' 2024 federal W-2 income statement{s) and a confirmation of non-filing from the IRS {see page 3).
If Yes	My parent(s) will submit the following as required documentation of their tax filing: ◯ <u>Required Documentation</u>: I/We used the Direct Data Exchange {FA-DDX} to directly import income information into the FAFSA. ◯ <u>Required Documentation</u>: I/We did not use the FA-DDX. We will request and submit an IRS 2024 "Tax Return Transcript" {see page 3}; **<u>OR</u>** we will submit a signed 2024 federal tax return.

PART IV: CERTIFICATION OF INFORMATION

We certify that all of the information reported on this worksheet is complete and accurate to the best of our knowledge. ***Electronic signatures are not acceptable- please print and sign.***
Warning: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

_____   _____
Student Signature (**INK** required, NO ELECTRONIC SIGNATURES}   Date

_____   _____
Parent or Step-Parent Signature (**INK** required, NO ELECTRONIC SIGNATURES}   Date

_____   _____
Other Parent or Step-Parent Signature (**INK** required, NO   Date
ELECTRONIC SIGNATURES}

Return this form to the SUNY Potsdam Financial Aid office with all required income documentation.

Documents need to be uploaded to our secure file drop location.

{Further documentation may be required upon review of this form.)

HOW TO REQUEST OFFICIAL IRS DOCUMENTATION

How to Request an IRS Tax Transcript

If you or your parent had taxable income in 2024 and filed a 2024 Federal Income Tax Return, you are required to provide us with documentation for that tax return. If both the student and parent filed income taxes, then both will need to request an IRS Tax Transcript.

1. View the Get Records and Transcripts webpage or the Get Records and Transcripts (Spanish) webpage or call 1-800-908-9946.
2. Be sure to request the "IRS tax return transcript" and NOT the "IRS tax account transcript."
3. You will need your Social Security Number, date of birth, and the address on file with the IRS. Your address is normally the mailing address used when filing your tax return.

The IRS will inform you of how long it will take to receive your tax transcript (it will likely take a couple of weeks depending upon time of year). The online process allows you to download the PDF version immediately.

How to Request Proof You Did NOT File Taxes

STUDENT: Not Required.

PARENT: Each parent in your household who did NOT file taxes for the year 2024 is required to provide us with confirmation from the IRS. If neither parent filed a tax return, both need to request confirmations from the IRS.

1. View the "Get Records and Transcripts webpage" or call 1-800-908-994
2. Be sure to request the "Verification of Nonfiling".
3. Your parent will need their Social Security Number, date of birth, and the address on file with the IRS.

The IRS will inform you how long it will take to receive your request (it will likely take a couple of weeks depending upon time of year). The online process allows you to download the PDF version immediately.

IRS Amended Tax Returns

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Income Tax Return", that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS or an ISIR record with all tax information from the original tax return.
- A 2024 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified.
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Contact the SUNY Potsdam One Stop if you are unable to provide the required proof using the above methods.