

2024 – 2025 DEPENDENT VERIFICATION WORKSHEET

SUNY Potsdam One Stop • 44 Pierrepont Avenue • Potsdam, NY 13676
 (315) 267-2943 • Toll-Free: (877) POTSDAM • onestop@potsdam.edu

Student Name: _____ Potsdam ID: _____

INSTRUCTIONS: Complete all four parts of this worksheet and submit to the One Stop 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 at <https://filedrop.potsdam.edu/finaid>

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
<input type="checkbox"/> Married
<input type="checkbox"/> Remarried
<input type="checkbox"/> Separated (not temporary)
<input type="checkbox"/> Divorced
<input type="checkbox"/> Widowed
<input type="checkbox"/> Unmarried and Living Together
<input type="checkbox"/> 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 **7/1/2024 and 6/30/2025** (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 **7/1/2024 and 6/30/2025**

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

Student Name: _____ Potsdam ID: _____

PART II: VERIFICATION OF STUDENT INCOME

Did you file an IRS income tax return or another tax return for the year 2022?

INCOME INFORMATION – STUDENT	
	Check one box and attach the required documentation:
If No	<input type="checkbox"/> I did NOT work at all in the year 2022. I had no 2022 income so I did not file a 2022 tax return because I was not required to. <u>Required Documentation:</u> None. <input type="checkbox"/> I did work in the year 2022. I did NOT file a 2022 tax return because I am not required to. <u>Required Documentation:</u> Submit copies of all your 2022 federal W-2 income statements.
If Yes	I will submit the following as required documentation of my tax filing: <input type="checkbox"/> I used the Direct Data Exchange (FA-DDX) to directly import income information into the FAFSA. <u>Required Documentation:</u> None. <input type="checkbox"/> <u>Required Documentation:</u> I did not use the FA-DDX. I will request and submit an IRS 2022 "Tax Return Transcript" (see page 3); OR I will submit a signed 2022 federal tax return.

PART III: VERIFICATION OF PARENT INCOME

Did your parent(s) file an IRS income tax return or another tax return for the year 2022?

INCOME INFORMATION – PARENT(S)	
	Check one box and attach the required documentation:
If No	<input type="checkbox"/> My parent(s) did NOT work at all in the year 2022. <u>Required Documentation:</u> Submit a confirmation of non-filing from the IRS (see page 3). <input type="checkbox"/> My parent(s) did work in the year 2022 but did NOT file a 2022 tax return. <u>Required Documentation:</u> Submit copies of all your parents' 2022 federal W-2 income statement(s) and a confirmation of non-filing from the IRS (see page 3).
If Yes	My parent will submit the following as required documentation of their tax filing: <input type="checkbox"/> <u>Required Documentation:</u> I/We used the Direct Data Exchange (FA-DDX) to directly import income information into the FAFSA. <input type="checkbox"/> <u>Required Documentation:</u> I/We did not use the FA-DDX. We will request and submit an IRS 2022 "Tax Return Transcript" (see page 3); OR we will submit a signed 2022 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 ELECTRONIC SIGNATURES)

Date

Return this form to the SUNY Potsdam One Stop office with all required income documentation.
Documents need to be uploaded to our secure file drop location at <https://filedrop.potsdam.edu/finaid>
(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 2022 and filed a 2022 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. Contact the IRS at www.irs.gov/Individuals/Get-Transcript or at www.irs.gov/es/Individuals/Get-Transcript (Spanish) 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 2022 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. Contact the IRS at www.irs.gov/Individuals/Get-Transcript 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 2022 must provide a signed copy of the 2022 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 2022 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 2022 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.

Is My Parent a **CONTRIBUTOR** When I Fill Out My FAFSA® Form?

A **parent** means your legal (biological or adoptive) parent or a person that the state has determined to be your legal parent. A **stepparent** is considered a parent if they have adopted you. Stepparents that have not adopted you will be identified as a parent spouse.

Are your biological or adoptive parents married to each other?



Your parents' marital status is married (not separated), and both of your parents' information must be included on the FAFSA® form. If your parents did not file taxes jointly, then both of your parents are contributors. Their individual information, consent and approval, and signatures will be required on the FAFSA form. If your parents filed taxes jointly, only one parent is required as a contributor and will report information for both parents.

Note: Dependent students are required to report parent information on the FAFSA® form, and in most cases, a parent will be identified as a contributor for these students. All contributors are required to provide their information, signature, and consent and approval to have their federal tax information transferred directly from the IRS into the FAFSA form. Being a contributor on the FAFSA form does not mean an obligation to pay for the student's education.

Do your biological or adoptive parents live together?



Your parents' marital status is unmarried (both legal parents living together), and both of your parents are contributors, even if they were never married, are divorced, or are separated. Their individual information, consent and approval, and signatures will be required on the FAFSA® form.

Did one parent provide more financial support than the other over the past 12 months?



The individual information, consent and approval, and signature of the parent who provided more financial support over the past 12 months will be required on the FAFSA® form, and this parent will be identified as a contributor.



The individual information, consent and approval, and signature of the parent who has the greater income and assets will be required on the FAFSA® form, and this parent will be identified as a contributor.



Has this parent married/remarried?



Your parent's marital status is married/remarried. Your stepparent will also be identified as a contributor on the FAFSA® form if they didn't file their taxes jointly with your parent.



Your parent's marital status is single (never married), separated, divorced, or widowed. An additional parent will not be identified as contributor.