2024 – 2025 INDEPENDENT VERIFICATION WORKSHEET

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

Student Name: _____   Potsdam ID: _____

INSTRUCTIONS: Complete all three parts of this worksheet and submit to One Stop with any required documentation. If you have any questions about whose information should be reported, contact One Stop for assistance. We must receive all required information to confirm/disburse your federal aid.
Read all instructions carefully and <u>attach all required documentation.</u>
Documents need to be uploaded to our secure file drop location at <u>https://filedrop.potsdam.edu/finaid</u>

PART I: VERIFICATION OF HOUSEHOLD

1. As of today, what is your marital status?
   - ❑ I am single/have never been married
   - ❑ I am married or remarried
   - ❑ I am separated, divorced or widowed

2. Write in the name, date of birth (DOB), and relationship of all the people in your household below; be sure to include:

   - Yourself and your spouse (if applicable)
   - Your children and your spouses's children (even if they do not live with you), IF
     (a) you will provide more than half of their support from July 1, 2024 through June 30, 2025, or
     (b) the children would be required to provide your information when applying for federal aid
   - Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2024 through June 30, 2025

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

CONTINUE ➔

Student Name: _____ Potsdam ID: _____

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

INCOME INFORMATION – STUDENT	
Did you file?	Check one box and attach the required documentation:
If No	❑ I did NOT work at all in the year 2022. I had no 2022 income so i did not file a 2022 tax return. Required Documentation: Submit a confirmation of non-filing from the IRS (see page 3). ❑ I did work in the year 2022. I did NOT file a 2022 tax return because I am not required to. Required Documentation: Submit copies of all of your 2022 federal W-2 income statement(s) and a confirmation of non-filing from the IRS (see page 3).
If Yes	❑ I used the Direct Data Exchange (FA-DDX) to directly import income information into the FAFSA. Required Documentation: None. ❑ I did not use the FA-DDX. Required Documentation: I will request and submit an IRS 2022 Tax Return Transcript (see page 3), **OR** I will submit a signed copy of my 2022 federal tax return.

Skip this question if you are NOT married.

If you are married, did you file a joint income tax return with your spouse for the year 2022?

INCOME INFORMATION – SPOUSE	
Did spouse file?	Check one box and attach the required documentation:
If No	❑ My spouse did NOT work at all in the year 2022. Required Documentation: Submit a confirmation of non-filing from the IRS (see page 3). ❑ My spouse did work in the year 2022 but did NOT file a 2022 tax return. Required Documentation: Submit copies of all your spouses' 2022 federal W-2 income statement(s) and a confirmation of non-filing from the IRS (see page 3).
If Yes	❑ My spouse did work and filed a **separate** 2022 federal income tax return. Required Documentation: Request and submit spouse's IRS 2021 Tax Return Transcript see page 3), **OR** submit a signed copy of spouse's 2021 federal tax return. ❑ I filed a **joint return** with my spouse. Required Documentation: None.

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

_____ _____
Student Signature (INK required, NO ELECTRONIC SIGNATURES) Date

_____ _____
Spouse Signature if married (INK required, NO ELECTRONIC SIGNATURES) Date

Return this form to SUNY Potsdam One Stop 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.)

Updated 4/2024

HOW TO REQUEST OFFICIAL IRS DOCUMENTATION

How to Request an IRS Tax Transcript

If you or your spouse 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 spouse 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 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

If you or your spouse did NOT file taxes for the year 2022, you are required to provide us with confirmation from the IRS. If both the student and spouse did not file, then both will need to request separate confirmations from the IRS.

1. Contact the IRS at www.irs.gov/Individuals/Get-Transcript or call 1-800-908-9946.
2. Be sure to request the "Verification of Nonfiling".
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 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 SUNY Potsdam One Stop if you are unable to provide the required proof using the above methods.