

SUNY Potsdam One Stop/Financial Aid • 44 Pierrepont Avenue • Potsdam, NY 13676
 Phone: (315) 267-2943 • Toll-Free: (877) POTSDAM • Fax: (315) 267-3067 • Email:
onestop@potsdam.edu

2023-2024 DEPENDENT VERIFICATION WORKSHEET

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 CUSTODIAL PARENT HOUSEHOLD

See the "Who's my parent?" information sheet below if you are unsure whose information to report.

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

Marital Status	Status Date (Month and Year)
<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	N/A
<input type="checkbox"/> Never Married	N/A

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 a parent)
- ✓ Your parent(s), including stepparent if your custodial parent has remarried
- ✓ Your parent's other children **IF** your parent will provide more than half of their financial support between **7/1/2023 and 6/30/2024** (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 **7/1/2023 and 6/30/2024**

Full Name of Household Member	Date of Birth	Relationship to Student	Attending college at least half-time in a degree or certificate program between 7/1/23 and 6/30/24?
		Self	SUNY Potsdam
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:
			<input type="checkbox"/> No <input type="checkbox"/> Yes, College name:

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 2021?

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 2021. I had no 2021 income so I did not file a 2021 tax return because I was not required to. <u>Required Documentation:</u> None. <input type="checkbox"/> I did work in the year 2021. I did NOT file a 2021 tax return because I am not required to. <u>Required Documentation:</u> Submit copies of all your 2021 federal W-2 income statements.
If Yes	I will submit the following as required documentation of my tax filing: <input type="checkbox"/> <u>Required Documentation:</u> I will use/have used the IRS Data Retrieval Tool on FAFSA.gov (instructions on page 3). <input type="checkbox"/> <u>Required Documentation:</u> I will request and submit an IRS 2021 “Tax Return Transcript” (instructions on page 3); OR I will submit a signed 2021 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 2021?

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 2021. <u>Required Documentation:</u> Submit a confirmation of non-filing from the IRS using Form 4506-T (instructions on page 3). <input type="checkbox"/> My parent(s) did work in the year 2021 but did NOT file a 2021 tax return. <u>Required Documentation:</u> Submit copies of all your parents’ 2021 federal W-2 income statement(s) and a confirmation of non-filing from the IRS using Form 4506-T (see instructions on 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 will use/have used the IRS Data Retrieval Tool on FAFSA.gov (instructions on page 3). <input type="checkbox"/> <u>Required Documentation:</u> I/We will request and submit an IRS 2021 “Tax Return Transcript” (instructions on page 3); OR I/we will submit a signed 2021 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 (required)

Date

Parent or Step-Parent Signature (required)

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 use the IRS Data Retrieval

This is the preferred quickest method to verify a 2021 Federal Income Tax Return (IRS Form 1040).

If you or your parent had taxable income in 2021 and filed a 2021 Federal Income Tax Return, then 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 use the IRS Data Retrieval process to verify both incomes.

1. Go to FAFSA on the Web at www.fafsa.gov.
2. Login to your account using your FSA ID.
3. Retrieve and transfer 2021 IRS income information into the FAFSA. *Note: If you are unable to retrieve data you will need to try the IRS Tax Transcript method.*
4. Separate retrievals will need to be done for student and parent income if both filed a tax return.
5. Electronically sign and submit the FAFSA corrections you just made verifying income. Both parent and student must provide their FSA ID to sign electronically.

The results will be sent electronically to SUNY Potsdam within 7-10 days.

How to request an IRS Tax Transcript

This is the second choice option to verify a 2021 Federal Income Tax Return (IRS Form 1040).

If you or your parent had taxable income in 2021 and filed a 2021 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.
4. Alternatively, student and/or parent can submit a completed paper 4506-T IRS Request for a Transcript of Tax Return form to the IRS for processing. You must check BOX 6a on that form to request a tax return transcript.

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 2021 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 1-800-908-9946.
2. Be sure to request the “Verification of Nonfiling”.
3. Alternatively, you can submit a completed paper 4506-T IRS Request for a Transcript of Tax Return form to the IRS for processing. You must check BOX 7 on that form to request the verification of non-filing.
4. Your parent will need their Social Security Number, date of birth, and the address on file with the IRS.

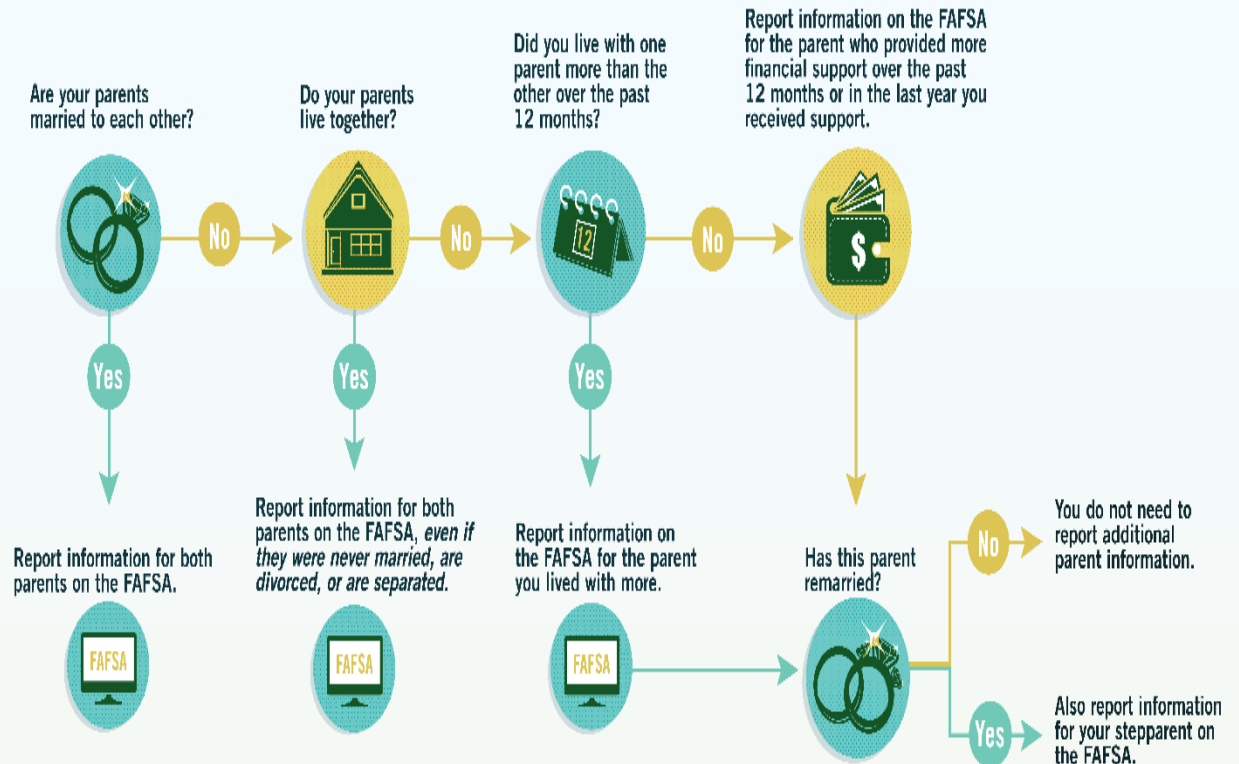
The IRS will inform you how long it will take to receive your request (it will likely take a couple of weeks depending upon time of year). The online process allows you to download the PDF version immediately.

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

WHO'S MY PARENT WHEN I FILL OUT MY FAFSA®?

Dependent students are required to report parent information on the *Free Application for Federal Student Aid (FAFSA)*.¹ For reporting purposes, "PARENT" means your legal (biological or adoptive) parent or stepparent, or a person that the state has determined to be your legal parent.

Use this guide to figure out which parent's information to include (depending on your family situation).



The following people are not your parents unless they have legally adopted you:



Widowed Stepparent



Grandparents



Foster Parents



Legal Guardians



Older Brothers or Sisters



Aunts or Uncles

If you're not sure whom to report as a parent, you can visit StudentAid.ed.gov/afsa/filling-out/parent-info or call 800-4-FED-AID (800-433-3243).

¹ If you're not sure whether you are a dependent student, go to StudentAid.ed.gov/afsa/filling-out/dependency

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of
the AMERICAN MIND®