

Student Name: _____ Potsdam ID: _____

2023 – 2024 INDEPENDENT VERIFICATION WORKSHEET

INSTRUCTIONS: Complete all four parts of this worksheet and submit for processing with any required documentation. If you have any questions about whose information should be reported, contact the Financial Aid office for assistance. We must receive all required information to confirm/disburse your federal aid. **Be sure to read carefully and attach 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

1. As of today, what is your marital status?
 - I am single/have never been married. I am separated, divorced or widowed, and not remarried.
 - I am married or remarried.

2. What is the month and year you were married, remarried, separated, divorced, or widowed? _____
Month / Year

3. 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 you have one;
 - Your children, even if they do not live with you, if
 - (a) you will provide more than half of their support from July 1, 2023 through June 30, 2024, or
 - (b) the children would be required to provide parental information when applying for federal aid; and
 - 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, 2023 through June 30, 2024.

FULL NAME	DOB	RELATIONSHIP	NAME OF COLLEGE OR CHECK NONE
<i>(example) Heather Smith</i>	<i>01/23/1999</i>	<i>Self</i>	<input type="checkbox"/> None <input checked="" type="checkbox"/> College Name: <i>SUNY Potsdam</i>
			<input type="checkbox"/> None <input type="checkbox"/> College Name:
			<input type="checkbox"/> None <input type="checkbox"/> College Name:
			<input type="checkbox"/> None <input type="checkbox"/> College Name:
			<input type="checkbox"/> None <input type="checkbox"/> College Name:
			<input type="checkbox"/> None <input type="checkbox"/> College Name:
			<input type="checkbox"/> None <input type="checkbox"/> College Name:
			<input type="checkbox"/> None <input type="checkbox"/> College Name:

4. Be sure to indicate if each household member will be attending a college, if they will be attending at least half time between July 1, 2023 and June 30, 2024 and will be enrolled in a degree, diploma, or certificate program.

CONTINUE

Student Name: _____

Potsdam ID: _____

PART II: VERIFICATION OF INCOME

5. Did you file an IRS income tax return or another tax return for the year 2021?

INCOME INFORMATION – STUDENT	
Did you file?	Check one box and attach the required documentation:
If No	<input type="checkbox"/> I 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"/> 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 of your 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	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 copy of my 2021 federal tax return.

6. **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 2021?

INCOME INFORMATION – SPOUSE	
Did spouse file?	Check one box and attach the required documentation:
If No	<input type="checkbox"/> My spouse 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 spouse did work in the year 2021 but did NOT file a 2021 tax return. <u>Required Documentation:</u> Submit copies of all your spouses' 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	<input type="checkbox"/> My spouse did work and filed a separate 2021 federal income tax return. <u>Required Documentation:</u> Request and submit spouse's IRS 2021 Tax Return Transcript (instructions on page 3), OR submit a signed copy of spouse's 2021 federal tax return. <input type="checkbox"/> I filed a joint return with my spouse. No further additional documentation is required.

PART III: CERTIFICATION OF INFORMATION

7. 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 (required)

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.)

SEE NEXT PAGE FOR – HOW TO REQUEST YOUR OFFICIAL IRS DOCUMENTATION

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 spouse 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.

1. Go to FAFSA on the Web at www.fafsa.gov . (<https://studentaid.ed.gov/sa/help/student-corrections-irs-drt>)
2. Login to your account using your FSA ID; Select "Make FAFSA Corrections".
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. Electronically sign and submit the FAFSA corrections you just made verifying your income.

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 spouse 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 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.
4. 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 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

If you or your spouse did NOT file taxes for the year 2021, 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. 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. 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.

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