Dependent Student

2022–2023 Verification Worksheet

Your 2022–2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid office will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit to the financial aid office. SUNY Schenectady may ask for additional information.

A. Dependent Student's Information

| Student's Last Name | Student's First Name | Student's M.I. | SUNY Schenectady ID No. or Student's SSN |
|--------------------------------|----------------------|-------------------------|--|
| () Student's Home Phone Num | | te or Cell Phone Number | //r Student's Date of Birth |

B. Dependent Student's Family Information: If more space is needed, provide a separate page with the student's name and ID number at the top.

• Yourself, even if you don't live with a parent

| Full Name | Age | Relationship | College enrolled at between July 1, 2022 -June 30, 2023* | At least half time? (Yes or No) |
|-----------|-----|--------------|---|---------------------------------------|
| | | Self | | |

The parents

- The biological parent you live with AND his or her legal spouse, if applicable
- Both of your biological parents if they are married, or unmarried but living together
- If you no longer live with a parent, then list the biological parent you lived with most recently, (or received the most support from most recently) AND his or her legal spouse, if applicable

• The parent you listed on FAFSA AND his or her **legal** spouse, if applicable

| Full Name | Age | Relationship |
|-----------|-----|-------------------------------|
| | | Parent 1 |
| | | Parent 2 or Parent 1's spouse |

Other Children (Include children who meet either of these standards, even if they do not live with the parents.)

o If your parents will provide more than half of their support from July 1, 2022, through June 30, 2023, or

 If the other children would be required to provide parental data if they were completing a FAFSA for 2022– 2023

| Full Name | Age | Relationship | College enrolled at between July 1, 2022 -June 30, 2023* | At Least Half Time? (Yes or No) |
|-----------|-----|--------------|---|---------------------------------------|
| | | Sibling | | |
| | | | | |
| | | | | |
| | | | | |

Other people if they now live with the parent(s) AND

• The **parent(s) provide more than half of their support** and will continue to provide more than half of their support through June 30, 2023.

| Full Name | Age | Relationship | College enrolled at between July 1, 2022 -June 30, 2023* | At Least Half Time? (Yes or No) |
|-----------|-----|--------------|---|---------------------------------------|
| | | | | |
| | | | | |

*Include the name of the college for any household member, <u>excluding the parents</u>, who will be enrolled <u>at least half time</u> in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2022, and June 30, 2023.

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student's Name: ______ SSN or SCCC ID No: _____

| | | Employer's Name | | 2020 Amount Earned | IRS W-2 or an Equivalent Document Provided? |
|--------------|--|---|--|--|--|
| | | lent <u>was</u> employed in 2020 and di tatements: | d not file a ta | x return; please complete | this grid and submit |
| | The stuc | lent <u>was not</u> employed and had n | o income ear | ned from work in 2020. | |
| Did <u>N</u> | <u>IOT</u> file a tax re | eturn: The student <u>DID NOT FIL</u> boxes below: | <u>E</u> a 2020 inco | me tax return. Please che | ck the applicable |
| | <u>Get Trans</u> <u>Make sur</u> <u>Get Trans</u> <u>Make sur</u> <u>Automat</u> | I. script by MAIL – Go to www.irs.gov, cli e to request the "IRS Tax <u>Return</u> Tran script ONLINE – Go to www.irs.gov, cli e to request the "IRS Tax <u>Return</u> Tran ed Telephone Request – 1-800-908-9 quest Form – IRS Form 4506T-EZ or II | script " and <i>NC</i> ck "Get Your Ta script " and <i>NC</i> 946 | 97 the "IRS Tax Account Transo ax Record" and then click "Get 97 the "IRS Tax Account Transo | cript." Transcript ONLINE." cript." |
| | A copy of through | f the 2020 IRS Tax Return Transcr | pt. A 2020 T | ax <u>Return</u> Transcript r | nay be obtained |
| | A signed | <u>l</u> copy of the 2020 IRS form 1040 v | /ith schedule | s 1, 2, and 3 | |
| | The IRS | DRT in FAFSA on the Web to trans | fer 2020 IRS | income tax information in | to FAFSA |
| 🗌 Did f | ile a tax return | : The student <u>DID FILE</u> a 2020 ir document your income: | ncome tax ret | urn. Please indicate the n | nethod you will use to |
| C. Stud | ent: Verifica | tion of 2020 Income Informa | tion for a D | ependent Student | |

| Employer's Name | 2020 Amount Earned | IRS W-2 or an Equivalent Document Provided? |
|---------------------------------|--------------------|--|
| Suzy's Auto Body Shop (example) | \$2,000.00 | Yes |
| | | |
| | | |
| | | |

D. Parent: Verification of 2020 Income Information for Parent (and spouse, if applicable)

Did file a tax return: The parent (and spouse, if applicable) <u>DID FILE</u> a 2020 income tax return. Please indicate the method you will use to document your income:

| Т | he IRS DRT in | FAFSA on the | Web to transfer | 2020 IRS income | e tax information | into FAFSA |
|---|---------------|--------------|-----------------|-----------------|-------------------|------------|
|---|---------------|--------------|-----------------|-----------------|-------------------|------------|

A <u>signed</u> copy of the 2020 IRS form 1040 with schedules 1, 2, and 3

A copy of the 2020 IRS Tax Return Transcript. A 2020 **Tax <u>Return</u> Transcript** may be obtained through:

- <u>Get Transcript by MAIL</u> Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax <u>Return</u> Transcript" and *NOT* the "IRS Tax Account Transcript."
- <u>Get Transcript ONLINE</u> Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax <u>Return</u> Transcript" and *NOT* the "IRS Tax Account Transcript."
- Automated Telephone Request 1-800-908-9946
- Paper Request Form IRS Form 4506T-EZ or IRS Form 4506-T

Did <u>NOT</u> file a tax return: The parent <u>DID NOT FILE</u> a 2020 income tax return**. Please check the applicable boxes below:

The parent (and spouse, if applicable) <u>was not</u> employed and had no income earned from work in 2020.

The parent (and spouse, if applicable) <u>was</u> employed in 2020 and did not file a tax return; please complete this grid and submit all W-2 statements:

| Employer's Name | 2020 Amount Earned | IRS W-2 or an Equivalent Document Provided? |
|---------------------------------|--------------------|--|
| Suzy's Auto Body Shop (example) | \$2,000.00 | Yes |
| | | |
| | | |
| | | |

** Provide documentation from the IRS (known as Verification of Non-filing letter) or other relevant tax authority dated on or after October 1, 2020 that indicates a 2020 income tax return was not filed with the IRS or other relevant tax authority, or a signed statement certifying that the individual attempted to obtain confirmation of non-filing from the IRS or other relevant tax authority and was unable to obtain the required documentation.

Non-filing letter can be obtained by checking box 7 on IRS Form 4506T. Return the completed form to the Financial Aid Office. Obtain form online at http://sunysccc.edu/financialaid



Check here if confirmation of non-filing is provided.



Check here if confirmation of non-filing will be provided later

Check here if you attempted to obtain verification of non-filing but were unable to obtain the required documentation

E. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, be sentenced to jail, or both.

** Electronic or typed signatures are not acceptable **

| Student's Signature | (Required) | Date | |
|---------------------|------------|------|--|
| Parent's Signature | (Required) | Date | |

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school. You should make a copy of this worksheet for your records.

Verification of 2020 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS:

- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2020;
- Verification of Non-Filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2020 or a signed statement certifying that the individual attempted to obtain verification of non-filing and was unable to obtain the required documentation;
- A copy of IRS Form W–2 for each source of employment income received for tax year 2020 and,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2020.

Individuals Who Filed an Amended IRS Income Tax Return:

- A 2020 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed); and
- A signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft:

- Must call 800-908-9946 and request a Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any
 other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Individuals Who Filed Non-IRS Income Tax Returns

• A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.