SUNY Cortland

2023-2024 Dependent Verification Worksheet

Last Name _____ First Name _____ MI _____ C00 _____ Cortland ID

Address _____ City _____ State _____ Zip _____ Email

Section A: Household Information

In the table below, please report the following members of your parent(s) household. Please include:

- Yourself
- Your parent(s), including step-parent(s)
- Your parent's dependent children if your parent(s) currently provide and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

Full Name	Age	Relationship to Student	College Attending 2023-2024 (at least half-time)
Missy Jones (*example*)	18	*Sister*	*Central University*
		Self	SUNY Cortland

Section B: Student Income Information

Did the student file, or was the student required to file a 2021 Federal Tax Return? Check the box that applies:

☐ **No**, and the student **did not** work in 2021. No additional documentation is required.

☐ **No**, but the student did have earnings from work in 2021. Submit copies of all student 2021 W2s and complete the chart below.

Name of Employer	2021 Amount Earned

☐ **Yes**, and the student has used the IRS Data Retrieval on the FAFSA to verify 2021 income. No additional documentation is required.

☐ **Yes**, and the student is not able to use the IRS Data Retrieval on the FAFSA. The student will instead submit a 2021 Tax Return Transcript OR a signed copy of the 2021 Income Tax Return and all applicable tax schedules. Additional instructions are available on the third page of this form.

Last Name	First Name	MI	C00_____
			Cortland ID

Section C: Parent Income Information

Did the parent(s) file, or were the parent(s) required to file a 2021 Federal Tax Return? Check the box that applies:

☐ **Yes**, and the parent has used the IRS Data Retrieval on the FAFSA to verify 2021 income. No additional documentation is required unless:

- An amended tax return was filed, then submit a **signed** copy of the IRS Form 1040X, "Amended U.S. Individual Income Tax Return" filed with the IRS.

- You rolled any portion of a distribution from pensions, annuities, profit sharing, IRAs and/or retirement plans, then submit a **signed** copy of the 1099-R form.

☐ **Yes**, and the parent is not able to use the IRS Data Retrieval on the FAFSA to verify 2021 income. The parent(s) will instead submit a 2021 IRS Tax Return Transcript(s) **OR** a signed copy of the 2021 Income Tax Return with applicable schedules. Additional instructions are available to the third page of this form.

- If an amended tax return was filed, submit a **signed** copy of the IRS Form 1040X, "Amended U.S. Individual Income Tax Return" filed with the IRS.

- If you rolled any portion of a distribution from pensions, annuities, profit sharing, IRAs and/or retirement plans, submit a **signed** copy of the 1099-R form.

☐ **No**, and the parent(s) **did not** work in 2021. Parent will submit IRS Proof of Non-Filing for 2021. Additional instructions are available on the third page of this form.

☐ **No**, but the parent did have earnings in 2021. The parent will submit IRS Proof of Non-Filing for 2021, copies of all 2021 W2s and complete the chart below.

Name of Employer	2021 Amount Earned

CERTIFICATION and SIGNATURES

By signing this worksheet, each person certifies that all the information reported is complete and correct and all required documentation has been attached. At least one parent whose information was reported on the FAFSA must sign and date. **A physical signature is required; electronic signatures will not be accepted.**

_____

Student Signature   Date

_____

Parent Signature   Date

Verification Tax Documentation Instructions:

If you are selected for federal verification, SUNY Cortland is required to verify income information reported on your FAFSA. Please submit your tax information using one of the following options:

Option 1: IRS DATA RETRIEVAL TOOL (Preferred Method)

The best way to verify income is by using the IRS Data Retrieval tool, which is part of FAFSA. This tool imports accurate tax information into the FAFSA.

1. Login to your 2023-2024 FAFSA at www.studentaid.gov and select "Make FAFSA Corrections," navigate to student/parent financial sections.
2. Under the "Income" section, click "Link to IRS" and you will be transferred to the IRS website.
3. On the IRS website, enter all required information to authenticate your identity.
4. After verification, your IRS tax information will be displayed. Select "Transfer My Tax Information into the FAFSA."
5. Tax information transferred from the IRS will be marked with "Transferred from the IRS" on your FAFSA.

Option 2: IRS TAX RETURN TRANSCRIPT

If you are unable to complete IRS DATA retrieval, you can request an IRS Tax Return Transcript. A transcript can be requested online, by phone or by mail.

Online	1. Go to www.irs.gov/transcript
	2. Select either:
	   a. "Get Transcript online" a transcript will be offered to you immediately via PDF.
	   b. "Get Transcript by mail" a transcript will be mailed to your home address and will take an average of 10 business days.
	3. Follow the instructions and enter the required data for tax year 2021. Please select transcript type "IRS Tax Return Transcript" (**not** "IRS Tax Account Transcript).
	4. Provide a copy to our office once received.

Mail	1. Complete the IRS Form 4506-T-EZ and mail to the applicable IRS Office. 2. Provide a copy to our office once received.
Phone	1-800-908-9946

Option 3: Copy of Tax Return

If you are unable to complete IRS Data Retrieval or submit a Tax Return Transcript, please submit a signed copy of the 2021 Income Tax Return with all applicable schedules.

Proof of Non-Filing

Individuals who did not, and was not required to, file a 2021 tax return, must submit an IRS proof of non-filing. A transcript can be requested online, by phone or by mail.

Online	Follow Instructions for "Option 2: IRS TAX RETURN TRANSCRIPT" above, however at step 3 select transcript type "**Verification of non-filing.**"
Mail	1. Complete the IRS Form 4506-T-EZ and mail to the applicable IRS Office. 2. Provide a copy to our office once received.
Phone	1-800-908-9946