



2025-2026 Independent Verification Worksheet

| | | | |
|-----------|------------|-------|--------------------------|
| Last Name | First Name | MI | C00 _____ Cortland ID |
| Address | City | State | Zip _____ Email |

Section A: Household Information

List all individuals in your household. Please include:

- Yourself
- Your spouse (if you are married)
- Your children (if applicable) or individuals you currently provide and will continue to provide more than half of their support from July 1, 2025 through June 30, 2026.

| Full Name | Age | Relationship to Student |
|--------------------------------|-----|-------------------------|
| Missy Jones (<i>example</i>) | 18 | Sister |
| | | Self |
| | | |
| | | |
| | | |

Section B: Student Income Information

Did the student file, or was the student required to file a 2023 Federal Tax Return? Check the box that applies:

- Yes**, and the student has used the Financial Aid Direct Data Exchange on the FAFSA to verify 2023 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 student is not able to use the Financial Aid Direct Data Exchange on the FAFSA to verify 2023 income. The student will instead submit a **2023 IRS Tax Return Transcript(s) OR a signed copy of the 2023 Income Tax Return with applicable schedules.**
- 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.

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

- No**, and the student **did not** work in 2023. Student will **submit IRS Proof of Non-Filing for 2023**.
- No**, but the student did have earnings in 2023. The student will **submit IRS Proof of Non-Filing for 2023, copies of all 2023 W2s and complete the chart below**.

| Name of Employer | 2022 Amount Earned |
|------------------|--------------------|
| | |
| | |

Section C: Spouse Income Information

Did the student’s spouse file, or was the spouse required to file a 2023 Federal Tax Return? Check the box that applies:

- Yes**, and the spouse has used the Financial Aid Direct Data Exchange on the FAFSA to verify 2023 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 spouse is not able to use the Financial Aid Direct Data Exchange on the FAFSA to verify 2023 income. The spouse will instead submit a **2023 IRS Tax Return Transcript(s) OR a signed copy of the 2023 Income Tax Return with applicable schedules**.
 - 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 spouse **did not** work in 2023. The spouse will **submit IRS Proof of Non-Filing for 2023**. Additional instructions are available on the third page of this form.
- No**, but the spouse did have earnings in 2023. The spouse will **submit IRS Proof of Non-Filing for 2023, copies of all 2023 W2s and complete the chart below**.

| Name of Employer | 2022 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. **A physical signature is required; electronic signatures will not be accepted.**

Student’s Signature _____ Date _____ Spouse’s Signature _____ Date _____