

2026-2027 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, 2026 through June 30, 2027.

Full Name	Age	Relationship to Student
Missy Jones (example)	18	Sister
		Self

Section B: Student Income Information

Did the student file, or was the student required to file a 2024 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 2024 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 2024 income. The student will instead submit a **2024 IRS Tax Return Transcript(s) OR a signed copy of the 2024 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.

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No, and the student **did not** work in 2024. Student will **submit IRS Proof of Non-Filing for 2024**.

No, but the student did have earnings in 2024. The student will **submit IRS Proof of Non-Filing for 2024, copies of all 2024 W2s and complete the chart below**.

Name of Employer	2024 Amount Earned

Section C: Spouse Income Information

Did the student's spouse file, or was the spouse required to file a 2024 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 2024 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 2024 income. The spouse will instead submit a **2024 IRS Tax Return Transcript(s) OR a signed copy of the 2024 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 2024. The spouse will **submit IRS Proof of Non-Filing for 2024**. Additional instructions are available on the third page of this form.

No, but the spouse did have earnings in 2024. The spouse will **submit IRS Proof of Non-Filing for 2024, copies of all 2024 W2s and complete the chart below**.

Name of Employer	2024 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 _____