

## Financial Aid • One Hop Shop

34 Cornell Drive • Canton, NY 13617 • Tel: (315) 386-7616 • Fax: (315) 386-7930 • [finaid@canton.edu](mailto:finaid@canton.edu)

Student Name: \_\_\_\_\_ 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 One Hop Shop for assistance. We must receive all required information to confirm your financial aid offers. **Be sure to read carefully and attach all required documentation.**

#### PART I: VERIFICATION OF HOUSEHOLD

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1. As of today, what is your marital status?
 

<input type="checkbox"/> I am single.	<input type="checkbox"/> I am separated.
<input type="checkbox"/> I am married or remarried	<input type="checkbox"/> I am divorced or widowed.
  
2. What is the month and year you were married, remarried, separated, divorced, or widowed? \_\_\_\_\_  

Month / Year
  
3. Write in the name, age, 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	AGE	RELATIONSHIP	NAME OF COLLEGE OR CHECK NONE
<i>Heather Smith (example)</i>	<i>30</i>	<i>Self</i>	<input type="checkbox"/> None <input checked="" type="checkbox"/> College Name: <i>SUNY Canton</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: \_\_\_\_\_

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 submit confirmation using the IRS Data Retrieval Tool on studentaid.gov (instructions on page 3). <input type="checkbox"/> <u>Required Documentation:</u> I will submit confirmation by requesting an IRS “Tax Return Transcript” by phone, online, or mail or a signed tax return with all applicable schedules.

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 you 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 2020 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). <input type="checkbox"/> My spouse did work and filed a separate income tax return. <u>Required Documentation:</u> Submit confirmation of spouse tax filing using the IRS Data Retrieval Tool on FAFSA.gov or an IRS “Tax Return Transcript” (instructions on page 3).
If Yes	<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. *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 the One Hop Shop with all required income documentation.**

(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 TAX DOCUMENTATION

## How to use the IRS Data Retrieval

This is the preferred quickest method to verify a 2021 Federal 1040 Income Tax Return.

If you or your spouse worked in 2021 and filed a 2021 Federal 1040 Income Tax Return, then you are required to provide us with documentation for that tax return.

1. Go to FAFSA on the Web at [studentaid.gov](https://studentaid.gov).
2. Login to your account using your FSA ID.
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 Canton within a few days.

## How to request an IRS Tax Transcript

This is the second choice option to verify a 2021 Federal 1040 Income Tax Return.

If you or your spouse worked in 2021 and filed a 2021 Federal 1040 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](https://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.

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 a 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](https://www.irs.gov/Individuals/Get-Transcript) or call 1-800-908-9946.
2. Be sure to request the “Verification of Nonfiling”.
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.

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 the One Hop Shop if you are unable to provide the required proof using the above methods.