

## 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 DEPENDENT VERIFICATION WORKSHEET

**INSTRUCTIONS:** Complete all five parts of this worksheet and submit to the One Hop Shop for processing with any required documentation. Failure to provide all required information will prevent us from being able to process your financial aid awards. **Be sure to read carefully and attach all required documentation.**

#### PART I: VERIFICATION OF PARENT HOUSEHOLD

1. As of today, what is the marital status of your legal parents? Check the appropriate box.  
*See the attached "Who's my parent?" information sheet if you are unsure whose information to report.*

<input type="checkbox"/> Unmarried, with both parents living together	<input type="checkbox"/> Never Married	<input type="checkbox"/> Separated
<input type="checkbox"/> Married or Remarried	<input type="checkbox"/> Divorced	<input type="checkbox"/> Widowed
  
2. What is the month and year of the above reported marital status of your legal parents? \_\_\_\_\_  

Month / Year
  
3. Write in the name, age, and relationship of all the people in your parent(s)' household below, be sure to include:
  - Yourself;
  - Your legal parent(s) that would provide more than half of your support, even if you choose not to live with your parent(s). A legal parent is a biological, adoptive, and/or step-parent;
  - Your parents' other children, even if they do not live with your parent(s), if
    - (a) your parents 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 your parents and your parents 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>18</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 STUDENT 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. I had no 2021 income so I did not file a 2021 tax return because I was not required to. <u>Required Documentation:</u> None. <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 your 2021 federal W-2 income statement(s).
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 a signed tax return with all applicable schedules.

**PART III: VERIFICATION OF PARENT INCOME**

6. Did your parent(s) file an IRS income tax return or another tax return for the year 2021?

INCOME INFORMATION – PARENT(S)	
Did you file?	Check one box and attach the required documentation:
If No	<input type="checkbox"/> My parent 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 parent did work in the year 2021 but did NOT file a 2021 tax return. <u>Required Documentation:</u> Submit copies of all your parents’ 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	My parent will submit the following as required documentation of their tax filing: <input type="checkbox"/> <u>Required Documentation:</u> We will submit confirmation using the IRS Data Retrieval Tool on studentaid.gov (instructions on page 3). <input type="checkbox"/> <u>Required Documentation:</u> We will submit confirmation by requesting an IRS “Tax Return Transcript” by phone, online, or mail or a signed tax return with all applicable schedules.

**PART IV: 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, be sentenced to jail, or both.*

\_\_\_\_\_  
Student Signature (required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent or Step-Parent 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.)

# 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 parent 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. If both the student and parent filed income taxes, then both will need to use the IRS Data Retrieval process to verify both incomes.

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. Separate retrievals will need to be done for student and parent income if both filed a tax return.
5. Electronically sign and submit the FAFSA corrections you just made verifying income. Both parent and student must provide their FSA ID to sign electronically.

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 parent 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 parent 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

STUDENT: Not Required.

PARENT: If your parent did NOT file a taxes for the year 2021, they are required to provide us with confirmation from the IRS. If your parents filed separate tax returns, then both will need to request 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. Your parent will need their Social Security Number, date of birth, and the address on file with the IRS.

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.