SUNY POLYTECHNIC INSTITUTE

2023-2024 Verification Worksheet
Federal Student Aid Programs

Please complete all sections using INK.

A. Student Information

_____   **U00**_____
Student's Last Name   Student's First Name   Student's M.I.   Student's ID Number

_____   _____
Student's Street Address (include apt. no.)   Student's Date of Birth

_____   _____   _____   _____
City   State   Zip Code   Student's Preferred Phone Number

B. Student and Family Information

Dependent Students

List below the people in your _parent(s)' household_, including:

- Yourself and your parent(s) (including a stepparent) even if you do not live with your parent(s).

- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with your parent(s).

- Other people if they now live with your parent(s) and your parent(s) 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.

Independent Students

List below the people in _your household_, including:

- Yourself and your spouse, if you are married.

- Your children, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with you.

- 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.

Full Name	Age	Relationship	College Currently Attending (If Applicable)	Will be Enrolled at Least Half Time?
(Example) Chris Jones	*18*	*Student*	*SUNY Poly*	*Yes*
1.		Self/Student	SUNY Polytechnic Institute	
2.				
3.				
4.				
5.				
6.				

If more space is needed, attach a separate page with the student's name and student's ID number at the top.

Continued on next page (over)

C. 2021 Income Verification

Instructions: Fill in **ONE** circle below for the Earnings & Tax Information description that best describes you. Required for student (Statement #s S1-S4) AND for parent of a dependent student or, if applicable, student's spouse (Statement #s PS1-PS4).

STUDENT		Earnings & Tax Information		PARENT OR SPOUSE
S1.	◯	**I filed a 2021 Federal Income Tax Return.** **Steps you must take:** See pages 3 – 5 for materials to submit to the Financial aid Office	◯	**PS1.**
S2.	◯	**I worked in 2021, but have not filed a 2021 Federal Income Tax Return because I am not required to.** **Steps you must take:** : See pages 3 – 5 for materials to submit to the Financial aid Office	◯	**PS2.**

S2. Part 2	Student		Parent or Spouse	PS2. Part 2
Amount Earned	*Source of Income*	*Amount Earned*	*Source of Income*	

STUDENT		Earnings & Tax Information		PARENT OR SPOUSE
S3.	◯	**I did not work in 2021, and will not file a 2021 Federal Income Tax Return.** **Steps you must take:** : See pages 3 – 5 for materials to submit to the Financial aid Office	◯	**PS3.**
S4.	◯	**I corrected my 2021 Federal Income Tax Return using an Amended Return (Form 1040X).** **Steps you must take:** : See pages 3 – 5 for materials to submit to the Financial aid Office	◯	**PS4.**

D. Certifications and Signatures

Each person signing this form certifies that all of the information reported is complete and correct. If the submitted FAFSA contains the parent or spouse's information, then the parent or spouse must also sign below. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

STUDENT

_____
Student Signature   Date

_____
Student Name (Please Print)

PARENT or SPOUSE (If Married)

_____
Parent or Spouse Signature   Date

_____
Parent or Spouse Name (Please Print)

Submit this worksheet and all required documentation to the SUNY Poly Financial Aid Office.
See next pages for list of documentation to submit.

Based on your responses on Page 2, please submit the appropriate documentation as listed below to the Financial Aid Office via the mail, fax: (315-792-7220), or scan/email as a PDF to: finaid@sunypoly.edu

Your Response from Page 2	REQUIRED DOCUMENTATION

I filed a 2021 Federal Income Tax Return.	1) SUNY Poly Verification Worksheet
	2) **The following is needed for the person(s) who filled in S1 and/or PS1** if the IRS Data Retrieval tool was not used when completing the FAFSA application:
	  a) **Signed** copy of their 2021 Federal Tax Return 1040 along with the 1040 Schedules 1, 2 and 3 (whichever are applicable); **OR**
	  b) A 2021 IRS Tax **Return** Transcript.
	We reserve the right to ask for additional information such as: 2021 W2 form(s), Schedule C/C-EZ and/or Schedule K-1 (IRS Form 1065)

I worked in 2021, but have not filed a 2021 Federal Income Tax Return because I am not required to.	1) SUNY Poly Verification Worksheet
	2) **The following is needed for the person(s) who filled in S2 and/or PS2.**
	  a) An IRS Verification of Non-Filing form for 2021 for:
	   i) Yourself, if you are an **independent** student and you did not file a 2021 federal tax return.
	   ii) Your spouse, if you are married and your spouse did not file a 2021 federal tax return.
	   iii) Your parent/step-parent(s) if they did not file a 2021 federal tax return.
	   • A Verification of Non-Filing form would be needed for each parent/step-parent that you reside with if taxes not filed.
	If you are a **dependent student and did not file a tax return, you do not need to submit a Verification of Non-Filing form.
	  b) 2021 W2 form(s), Schedule C/C-EZ and/or Schedule K-1 (IRS Form 1065)

I did not work in 2021, and will not file a 2021 Federal Income Tax Return.	1) SUNY Poly Verification Worksheet
	2) **The following is needed for the person(s) who filled in S3 and/or PS3.**
	  a) An IRS Verification of Non-Filing form for 2021 for:
	   i) Yourself, if you are an **independent** student and you did not file a 2021 federal tax return.
	   ii) Your spouse, if you are married and your spouse did not file a 2021 federal tax return.
	   iii) Your parent/step-parent(s) if they did not file a 2021 federal tax return.
	   • A Verification of Non-Filing form would be needed for each parent/step-parent that you reside with if taxes not filed.
	If you are a **dependent student and did not file a tax return, you do not need to submit a Verification of Non-Filing form.

I corrected my 2021 Federal Income Tax Return using an Amended Return (Form 1040X).	1) SUNY Poly Verification Worksheet
	2) **The following is needed for the person(s) who filled in S4 and/or PS4** if the IRS Data Retrieval tool was not used when completing the FAFSA application.
	  a) **Signed** copy of their original 2021 Federal Tax Return 1040 along with the 1040 Schedules 1, 2 and 3 (whichever are applicable); **OR**
	  b) A 2021 IRS Tax **Return** Transcript **AND** Tax **Account** Transcript
	  c) **Signed** copy of the 2021 Amended Federal Tax Return 1040X.
	  d) 2021 W2 form(s), Schedule C/C-EZ and/or Schedule K-1 (IRS Form 1065)

See next pages for instructions on the FAFSA IRS Data Retrieval Tool, IRS Tax Return Transcript, and IRS Verification of Non-Filing Letter

Instructions for IRS Data Retrieval Tool and
Instructions for Requesting an IRS Tax Return Transcript

Submitting your FAFSA using the **IRS Data Retrieval Tool (DRT)** allows you to transfer information directly from the IRS to your FAFSA. For instructions on using the IRS DRT, go to https://studentaid.gov/resources/irs-drt-text. Tax filers who are unable to use the IRS Data Retrieval Tool can request an IRS tax return transcript free of charge from the IRS in one of four ways.

Online Request → www.irs.gov
- Click on "Get Your Tax Record". Be sure to disable pop-up blockers.
- Click on "Get Transcript Online"
- To use the online request service, you will need: (1) your social security number, date of birth, filing status and mailing address from your latest tax return, (2) access to your email account, (3) your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan (4) a mobile phone with your name on the account. If you use a credit card number, it will **not** be charged.
- Click "Continue" and select "Higher Education/Student Aid" as the reason for requesting the transcript.
- For the type of transcript, select "Tax **Return** Transcript" (**not** "Tax **Account** Transcript") and select the appropriate tax year.
- A copy of your IRS Tax Return Transcript or Non-filing letter should now be displayed as a PDF file.

Mail Request → www.irs.gov
- Click on "Get Your Tax Record". Be sure to disable pop-up blockers.
- Click on "Get Transcript by Mail"
- Enter the tax filer's social security number, date of birth, street address, and zip code. Use the address currently on file with the IRS, which is usually the address that was listed on the latest tax return filed. For a joint tax return, use the primary tax filer's SSN, date of birth and address.
- Click "Continue".
- For the type of transcript, select "Tax **Return** Transcript" (**not** "Tax **Account** Transcript") and select the appropriate tax year.
- If successfully validated, tax filers will receive a paper IRS Tax Return Transcript or Non-filing letter within 5 to 10 business days. Tax Return Transcripts requested online can only be mailed to the address on file with the IRS.

Telephone Request → (800) 908-9946
- Tax filers must follow prompts to enter their social security number and numbers in their street address.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter the year desired.
- If successfully validated, tax filers will receive the paper transcript within 5 to 10 business days.

Paper Request Form → IRS Form 4506-T
- Download a PDF of the 4506-T at http://www.irs.gov/pub/irs-pdf/f4506t.pdf.
- Complete lines 1-4, following the instructions on page 2 of the form.
- On line 6, enter the tax form number requested (1040)
- Check the box on **6a Return Transcript** to request the IRS Tax Return Transcript.
- On line 9, enter the appropriate date that has been requested (12/31/20**).
- Check off the box that says **"Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sigh the Form 4506-T.**
- Sign and date the form and enter phone number of taxpayer
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of the form.
- Tax filers should receive their transcripts/letters within 10 business days from the date the IRS receives the form.

How to Get an IRS Verification of Non-Filing Letter

What is an IRS Verification of Non-filing Letter?
An IRS Verification of Non-filing Letter – provides proof that the IRS has no record of a filed Form 1040.

How can I get a Non-filing Letter?
You can request an IRS Verification of Non-filing letter, free of charge, from the IRS in one of two ways: Request online or by paper using IRS Form 4506-T.

Online Request → www.irs.gov
- Click on "Get Your Tax Record". Be sure to disable pop-up blockers.
- Click "Get Transcript ONLINE" (You will be required to validate your identity via financial verification data– for example, you must provide mortgage, credit card information or a mobile phone account in your name)
- Follow the on screen prompts to verify your identity.
- Click "Continue" and select "Higher Education/Student Aid" as the reason for requesting the transcript.
- Select "Verification of Non-Filing Letter" and in the "Tax Year" field select the year the Financial Aid Office is requesting.
- If successfully validated, you will be able to view and print your IRS Verification of Non-filing Letter.
- The non-filer must submit the IRS Verification of Non-filing Letter to the SUNY Poly Financial Aid Office. Please include your SUNY Poly Student ID (if known) on the form.

Paper Request Form → IRS Form 4506-T
- Complete and download IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf
- Complete lines 1-4, following the instructions on page 2 of the form.
- Line 7: Select the checkbox on the right hand side for Verification of Non-filing.
- Line 9: In the Year or Period Requested field enter the last day of the tax year (12/31/2020).
- Check off the box that says **"Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sigh the Form 4506-T.**
- The non-filer must sign and date the form and enter their telephone number.
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of the form.
- Tax filers can expect to receive a paper IRS Verification of Non-filing Letter at the address provided on their request within 5-10 days.

The non-filer must submit the IRS Verification of Non-filing Letter to the SUNY Poly Financial Aid Office. Please include your SUNY Poly Student ID (if known) on the form.