SUNY ADIRONDACK
Experience It For Yourself

2017-2018 Verification Worksheet
Federal Student Aid Programs

Your application was selected by the U.S. Dept. of Education for review in a process called "verification." In this process, we are required by federal law (34 CFR, Part 668) to compare the information from your application with the information provided on this form and review of your 2015 federal tax information (and your spouse's if you are married, or parents' if you are considered dependent for federal aid purposes). If there are differences between your application and the documents you have submitted, corrections may need to be made. You will receive acknowledgement of these changes. If we do made corrections please do not make any subsequent changes to your FAFSA data. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

Instructions:
1. Determine how you plan to provide 2015 tax information: a **signed** 2015 tax **return** transcript(s) from the IRS; or a **signed** IRS Verification of Non-filing Letter certifying that you were not required to file a 2015. For more information on how to obtain this information please see page 3.
2. Complete all sections and sign the worksheet. **If you are dependent, your parent's signature is also required**.
3. Contact us if you have questions about completing this worksheet.
4. **Deliver, mail, or FAX (518-743-2314)** to our office the completed worksheet, tax return transcripts, and/or Verification of Non-filing Letter.

A. Student Information

Last Name *First Name* *M.I.* *Social Security Number*

Address (include apt. #) *City* *State* *Zip Code*

Date of Birth *E-mail Address (optional)* *Phone Number (include area code)*

B. Family Information

☐ **Independent Students**: List the people in your household, including: (a) yourself, and (b) your spouse, if married; and (c) your children, if you will provide more than half of their support from July 1, 2017 through June 30, 2018; and (d) 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, 2017 through June 30, 2018.

☐ **Dependent Students**: List the people in your parents' household, including: (a) yourself, and (b) your parent(s) (including stepparent) even if you don't live with your parents; and (c) your parents' other children, even if they don't live with your parent(s), if (1) your parents provide more than half of their support from July 1, 2017 through June 30, 2018, or (2) the children would be required to provide parental information when applying for federal student aid; and (d) 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, 2017 through June 30, 2018.

Write the names of all household members as defined above. Also write in the name of the college for any family member, excluding your parent(s), who will be attending college at least half-time between July 1, 2017 and June 30, 2018, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Example: Martha Jones	*24*	*Wife*	*City University*
		Self	SUNY Adirondack

C. Income and Federal Tax Information

Choose one box for student/spouse and one box for parent(s), if applicable:

Student/spouse:

- ☐ Student/spouse used the IRS Data Retrieval tool within FAFSA and did not change the data.
- ☐ Student/spouse has or will submit a signed 2015 Tax Return Transcript obtained from the IRS (see instructions p. 3).
- ☐ Student/spouse is not required to file a 2015 tax return and has provided an IRS Verification of Non-Filing Letter from the IRS (see instructions p. 3). List earnings below and attach copies of all 2015 W-2s.

Employer(s) Name: If you did not work check here: ☐ *2015 Earnings:* *(from W-2 Box 1)*

_____ _____

_____ _____

_____ _____ Total:_____

Parent(s), including step-parent:

- ☐ Parent(s) used the IRS Data Retrieval tool within FAFSA and did not change the data.
- ☐ Parent(s) have or will submit a signed 2015 tax return transcript obtained from the IRS (see instructions p. 3).
- ☐ Parent(s) are not required to file a 2015 tax return and has provided an IRS Verification of Non-Filing Letter from the IRS (see instructions p. 3). List earnings below and attach copies of all 2015 W-2s.

Employer(s) Name: If you did not work check here: ☐ *2015 Earnings:* *(from W-2 Box 1)*

_____ _____

_____ _____

_____ _____ Total:_____

D. Additional Financial and Untaxed Income Information (if a category doesn't apply, enter a zero).

Student (spouse)	Calendar Year 2015	Parent(s) (including step-parent)
$	Education Credits (Hope & Lifetime Learning tax credits) 1040 = 49, A = 31	$
$	Payments to tax-deferred pension and savings plans including, but not limited to, amounts reported on the W-2 – Boxes 12a through 12d (codes D, E, F, G, H & S)	$
$	IRA, SEP, SIMPLE, & Keogh (1040 = 28 + 32, 1040A = 17)	$
$	Tax exempt interest income (1040 = 8b, 1040A = 8b)	$
$	Untaxed IRA distributions (exclude rollovers) (If negative, enter zero) 1040 = (15a minus 15b) 1040A = (11a minus 11b)	$
$	Untaxed portion of pensions (exclude rollovers) (If negative, enter zero) 1040 = (16a minus 16b) 1040A = (12a minus 12b)	$
$	Child support *received* for children (Exclude foster care/adoption payments)	$
$	Other Untaxed Income: Type: _____ (i.e., Workers Comp, disability) **DO NOT** include the following: extended foster care benefits, student aid, earned income credit, additional child credit, welfare payments, untaxed Social Security, SSI, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels	$
$	Money received or paid on your behalf, i.e. bills, etc. not reported elsewhere	$

F. Sign This Worksheet

By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If dependent, at least one parent must sign. **Warning**: Pursuant to federal law, if you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

_____ Date_____ _____ Date_____

Student's Signature Parent's Signature (Dependent Students Only)

Return to: SUNY Adirondack, Financial Aid Office, 640 Bay Road, Queensbury, NY 12804

How to Obtain Tax Information for Verification

As part of the federal verification process, financial aid administrators are required to review the income reported on the FAFSA against official IRS records. Tax filers are required to submit a copy of their 2015 Tax Return Transcript for this purpose. In addition, beginning with the 2017-18 award year, any individual who is subject to verification and did not file taxes, regardless of the amount of income (even zero), will be required to submit the IRS Verification of Non-filing Letter.

To obtain your 2015 Tax Return Transcript or an IRS Verification of Non-Filing Letter:

1) Online Request

- Go to the IRS Web site at **www.irs.gov**.
- In the "Tools" section of the homepage click "Get a tax transcript".
- You have the option to get the transcript online or by mail. You must create an account with the IRS to use the online services to obtain transcripts. If you do so, you can print your Return Transcript or Verification of Non-Filing letter directly from the website. If you request the document be mailed, you will enter your information and request the document you need, and it will be mailed in 5 to 10 business days.

2) In-Person Request (for Queensbury, NY IRS Office ONLY)

- Call **1-844-545-5640** to schedule an appointment to pick up a transcript or IRS Verification of Non-Filing Letter.
- On the day of your appointment visit the IRS Office located at 375 Bay Road, Queensbury NY.
- Request a copy of your 2015 tax return transcript or IRS Verification of Non-Filing Letter, whichever is applicable.

3) Telephone Request (Tax Return Transcript only)

- Available from the IRS by calling **1-800-908-9946**.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "2015".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

4) Mail Request

- If you cannot obtain a Tax Return Transcript or IRS Verification of Non-Filing letter online for any reason, these documents can be obtained by completing the **IRS Form 4506-T** *Request for Transcript of Tax Return*, available for download on our website under 'Forms'.
- To request a Tax Return Transcript, check box 6a and write the type of return you filed in the line provided (1040, 1040A, or 1040EZ). To request a Verification of Non-Filing letter, check box 7.
- This form should then be mailed to the IRS address below.

Internal Revenue Service
RAIVS Team
P.O. Box 145500
Stop 2800 F
Cincinnati, OH 45250