SUNY WESTCHESTER COMMUNITY COLLEGE

2025–2026 Verification Worksheet
Dependent Student

A. Dependent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number

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

City	State	Zip Code	Student's Email Address

Student's Home Phone Number (include area code)	Student's Alternate or Cell Phone Number

B. Dependent Student's Family Information

List below the people in your <u>parent(s)' household</u>. Include:

Yourself and your parent(s) (including a stepparent) even if you don't 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, 2024, through June 30, 2025, or if the other children would be required to provide parental information if they were completing a FAFSA for 2025–2026. 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 through June 30, 2024.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, <u>at least half time</u> in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2024, and June 30, 2025. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relation hip	College	Will be Enrolled at Least Half Time
Missy Jones (example)	*18*	*Sister*	*Central University*	*Yes*
		Self		

Student's Name: _____ **SSN:** _____

Dependent Student's Income Information to Be Verified

TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2021 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student, filed or will file a 2023 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2023 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

1. Check the box that applies:

☐ The student <u>has used</u> the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process*.

☐ The student <u>has not yet used</u> the IRS Data Retrieval Tool in FAFSA on the Web but will use the tool to retrieve and transfer 2023 IRS income information into the student's FAFSA once the student has filed a 2023 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*

☐ The student is <u>unable or chooses not to</u> use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2023 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to www.IRS.gov and click on the "get transcript of your tax records" link, or call 1-800-908-9946. Make sure to choose the "tax return transcript" and not the "tax account transcript." It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

☐ *Check here if the student's IRS tax return transcript is attached to this worksheet.*

☐ *Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.*

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is <u>not required</u> to file a 2023 income tax return with the IRS.

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2023.

☐ The student was employed in 2021 and has listed below the names of all the student's employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is attached. Attach copies of all 2023 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top*.

Employer's Name	2023 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*$2,000.00(example)*	*Yes(example)*

D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. **TAX RETURN FILERS**—**Important Note:** If the student's parent(s), filed or will file, an <u>amended</u> 2023 IRS tax return the student's financial aid administrator must be contacted before completing this section.

   Instructions: Complete this section if the student's parent(s) <u>filed or will file</u> a 2023 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to <u>FAFSA.gov</u>, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.*

   Check the box that applies:

   ☐ The student's parent <u>has used</u> the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2023 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*

   ☐ The student's parent <u>has not yet</u> used the IRS Data Retrieval Tool but will use the tool to transfer 2021 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*

   ☐ The parent <u>is unable or chooses not to</u> use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2023 IRS tax return transcript(s)** — not photocopies of the income tax return. *To obtain an IRS tax return transcript go to www.IRS.gov and click on the "get transcripts of your tax records" link or call 1-800-908-9946.*
   Make sure you choose the "tax return transcript" and not the "tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2022 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2021 tax returns were filed, 2023 IRS tax return transcripts must be submitted for each parent.

   ☐ *Check here if an IRS tax return transcript(s) is attached to this worksheet.*

   ☐ *Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.*

2. **TAX RETURN NONFILERS**—Complete this section if the student's parent(s) will not file and <u>is not required</u> to file a 2023 income tax return with the IRS.

   Check the box that applies:

   ☐   The parent(s) was not employed and had no income earned from work in 2023.

   ☐   The parent(s) was employed in 2021 and has listed below the names of all the parent's employers, the amount earned from each employer in 2023, and whether an IRS W-2 form is attached. Attach copies of all 2023 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2023 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*$2,000.00* (example)	*Yes* (example)

E. Certification and Signatures

Each person signing this worksheet certifies that all the information reported on it is complete and correct. The student and one parent must sign and date.

> **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

_____   _____
Student's Signature   Date

_____   _____
Parent's Signature   Date

Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.

Please keep a copy of this document for your records.