2024–2025 DEPENDENT VERIFICATION WORKSHEET (V1 or V5)

Finger Lakes Health College of Nursing & Health Sciences
Marion S. Whelan School of Practical Nursing

Student's Name:_____ **Student ID:** _____

Your 2024–2025 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Student's Information

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

B. Family Size - Includes the following:

List below the people in your household. Include:

- The student.
- The student's parents, even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- The student's siblings if the following are true:
  - They live with the student's parents (or live apart because of college enrollment),
  - They receive more than half of their support from the student's parents, and
  - They will continue to receive more than half their support from the student's parents during the award year.
- Other persons if the following are true:
  - They live with the student's parents,
  - They receive more than half of their support from the student's parents, and
  - They will continue to receive more than half their support from the student's parents during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S tax return at the time of completing the 2024-2025 FAFSA. As a result, the parent should not include any unborn children in the family size.

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

Full Name	Age	Relationship
		Self

C. Student's Income Information to Be Verified

1. **Verification of 2022 Income Information for Student Tax Filers**

Important Note: The instructions below apply to the student and spouse (if the student is married). Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the student and spouse filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

A **2022 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

- Get Transcript ONLINE – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.

- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

2. Verification of 2022 Income Information for Students with Unusual Circumstances

Complete this section if the student and/or spouse has filed or will file a 2022 income tax return with any of the following circumstances.

Check the box that applies:

☐ The student and/or spouse is required to file a 2022 IRS income tax return and **has been granted a filing extension by the IRS** beyond the six-month extension for tax year 2022, must provide:

- A signed statement listing the sources of any 2022 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2022; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2022.

☐ The student and/or spouse has filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2022 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

☐ The student and/or spouse was the **victim of IRS tax-related identity theft**, must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

☐ The student and/or spouse filed Non-IRS Income Tax Returns:

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

3. **Verification of 2022 Income Information for Student Nontax Filers**

The instructions and certifications below apply to the student (and spouse if the student is married). Complete this section if the student (and spouse if married), **will not file and are not required** to file a 2022 income tax return with the IRS.

Check the box that applies:

☐ The student and spouse were not employed and had no income earned from work in 2022.

☐ The student and/or spouse were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
(Example) ABC's Auto Body Shop	*Yes*	*$4,500*
		$
		$
		$
		$
		$
		$
Total Amount of Income Earned from Work -		**$**

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

____ Check here if confirmation of non-filing is provided.

Attach it to this document with the student's name and Student ID Number at the top.

____ Check here if confirmation of non-filing will be provided later

D. Parent's Income Information to Be Verified

1. **Verification of 2022 Income Information for Parent Tax Filers**

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2022 or had a change in marital status after December 31, 2022.

Instructions: Complete this section if the parents filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the parents was not available or could not be used, the parents should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.

2. **Verification of 2022 Income Information for Parents with Unusual Circumstances**

Complete this section if the student's parent(s) has filed or will file a 2022 income tax return with any of the following circumstances.

Check the box that applies:

☐ The parent(s) is required to file a 2022 IRS income tax return and **has been granted a filing extension by the IRS** beyond the six-month extension for tax year 2022, must provide:

- A signed statement listing the sources of any 2022 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2022; and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2022.

☐ The parent(s) has filed an amended IRS income tax return for tax year 2022 must provide a signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2022 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.

☐ The parent(s) was the **victim of IRS tax-related identity theft**, must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS or, if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2022 income tax return and applicable schedules the individual filed with the IRS; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

☐ The parent(s) filed Non-IRS Income Tax Returns:

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

3. **Verification of 2022 Income Information for Parent Nontax Filers**

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2022 income tax return with the IRS.

Check the box that applies:

☐ Neither parent was employed, and neither had income earned from work in 2022.

☐ One or both parents were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2022
(Example) ABC's Auto Body Shop	*Yes*	*$4,500*
		$
		$
		$
		$
		$
		$
Total Amount of Income Earned from Work -		**$**

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

____ Check here if confirmation of non-filing is provided.

Attach it to this document with the student's name and Student ID Number at the top.

____ Check here if confirmation of non-filing will be provided later

4. Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

_____ _____

Student's Signature (Required) Date

_____ _____

Parent's Signature (Required) Date

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