

Federal Verification Worksheet

Federal Student Aid Programs

WHAT IS VERIFICATION?

Verification is a federally mandated process by which aid offices compare information reported on the student's Free Application for Federal Student Aid (FAFSA) with tax documents and this worksheet. Your application has been selected for verification. **We cannot finalize your federal financial aid until you submit all required documentation.** Additional documents may be requested after your initial submission; students should monitor Banner regularly for updates.

DEADLINES: Students that do not complete verification by the established deadline forfeit federal financial aid, including loans. Deadline details and general FAQs are available at <http://financialaid.buffalostate.edu/verification>.

Steps to Complete Verification

1. Complete all sections (A – D) of this form.

Dependent students: data required of parent/step-parent, siblings, and all others living in the household

Independent students: (if applicable) data required of spouse, children, and all others living in the household

2. Collect the required **tax documents from 2021** – use tables on next page

Table 1 – dependent students

Table 3 – independent students

Table 2 – parents of dependent

Table 4 – spouses (if married) of independent

Who should be listed on the Household Information Chart on this form, Section B?

a) List Yourself:

- **Dependent Student** - even if you do not live with your parents

- **Independent Student** - skip **b)** and **c)** below, if applicable include spouse and/or children

b) List your parent(s):

- If your biological (or adoptive) parents live together, include both parents.
- If your biological (or adoptive) parents are separated or divorced, list your custodial parent.
- If your biological parents are unmarried and living together, include both parents
- If your custodial parent is remarried, include your step- parent.
- *For all other scenarios*, list the parent you live with. If you don't live with either parent, include the parent that has provided you the most support in the previous 12 months.

c) List your parents' other children: (Even if they do not live with your parent(s). Do not include foster children)

- **If** 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.
- **Important:** Submit the **Other People in Household (VOTH24)** form for each individual who falls into this category, which can be found at: financialaid.buffalostate.edu/forms.

d) List ALL other people who live in the household:

- **If they now live there AND** your parents, or you, or your spouse, 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.
- **Important:** Submit the **Other People in Household (VOTH24)** form for each individual who falls into this category, which can be found at: financialaid.buffalostate.edu/forms.

e) Include the name of the college where any household member on the list will attend next to their name, if they attend at least half-time in a matriculated program between July 1, 2023 and June 30, 2024.

IRS.gov for Non-filing status/Tax Return Transcripts/W-2 Transcripts:

To request an IRS records to confirm your non-filing status, request a tax return transcript or a W2 transcript (if required in section C), visit www.irs.gov/individuals/get-transcript. For 2023-2024, request records from 2021.

SUBMIT THIS FORM AND ALL REQUIRED DOCUMENTS TO:

Financial Aid Office, MH 230; 1300 Elmwood Ave.; Buffalo, NY 14222-1095
finaid@buffalostate.edu (pdf's only) · ph (716) 878-4902 · fax (716) 878-4903

2023-2024 Federal Verification Worksheet**A. Student Information**

Banner ID: _____ Name: _____

Address (Street, City, State, Zip): _____

Date of Birth: _____ Cell Phone: _____ Other Phone: _____

B. Household Information – see instructions page

Check the appropriate dependency status, and in the chart below, list all people in the household - include parents, children or any other people living there if the household income provides more than half of their support from July 1, 2023 - June 30, 2024.

☐ **Dependent Students** ☐ **Independent Students**

Full Name of Household Member	Age	Relationship to Student	College Name (if enrolled in 2023-2024)
		Self	Buffalo State

C. Tax Filing Status for 2021 and Required Tax Forms

Check the appropriate tax filing status and submit the required documentation listed. Dependent students and their parent(s) should complete Tables 1 and 2. Independent students should complete Table 3, and if married, Table 4.

Table 1: Dependent Student

- ☐ I did not work.
- ☐ I worked, but I have not filed a federal tax return and I was not required to file. Submit your W-2 statements from 2021.
- ☐ I filed a 2021 federal tax return. Submit a copy of your signed 2021 federal tax return (pages 1 & 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and E, if filed.

Table 2: Parents of Dependent Students (parents listed on FAFSA and in household chart on page 1)

- ☐ My parents did not work in 2021. Your parent(s) must submit a written, detailed statement explaining how they supported their family with no income. Include supporting documents as applicable (e.g., SNAP statement, social security statement).
- ☐ My parents worked, but did not file a tax return and were not required to file a tax return. Submit your parents' 2021 W-2 statements and request a tax return transcript from the IRS to confirm their non-filing status for 2021. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at <https://financialaid.buffalostate.edu/forms>.
- ☐ My parents filed a 2021 federal tax return. Submit a copy of their signed 2021 federal tax return (pages 1 & 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and E, if filed.

Table 3: Independent Student

- ☐ I did not work. Submit a written, detailed statement explaining how you supported yourself with no income in 2021.
- ☐ I worked but I have not filed taxes, and I am not required to file a tax return. Submit your 2021 W-2 statements and request a tax return transcript to confirm your non-filing status for 2021. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at <https://financialaid.buffalostate.edu/forms>.
- ☐ I filed a 2021 federal tax return. Submit a copy of your signed 2021 federal tax return (pages 1 or 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and E, if filed.

Table 4: Independent Student's Spouse (if student is married today)

- ☐ My spouse did not work. Your spouse must submit a written statement explaining how he/she was supported in 2021.
- ☐ My spouse worked but has not filed taxes, and was not required to file a tax return. Submit your spouse's 2021 W-2 statements and request a tax return transcript to confirm their non-filing status for 2021. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at <https://financialaid.buffalostate.edu/forms>.
- ☐ My spouse filed a 2021 federal tax return. Submit a copy of your spouse's signed 2021 federal tax return (pages 1 & 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and E, if filed.

D. Sign This Worksheet:

By signing this worksheet, I (we) certify that all the information reported is complete and correct. If you are a dependent student, at least one of your parents must sign.

Student's Signature _____

Date _____

Parent's Signature - dependent students only _____

Date _____