

**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/stepparent, 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 2024** – 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 the parent who provided you with more than 50% of your support during the last 12 months, even if you don't live with them.
- If your contributor parent is remarried, include your step- parent.
- If your biological parents are unmarried and living together, include both parents
- *For all other scenarios*, list the parent who provided you with more than 50% of your support during the last 12 months even if you don't live with them.

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

- **If** your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2026, through June 30, 2027.
- **Important:** Submit the **Other People in Household (VOTH27)** form for each individual who falls into this category **and** are 24 years of age or older or are foster children. The form can be found at: [financialaid.buffalostate.edu/forms](http://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, 2026, through June 30, 2027.
- **Important:** Submit the **Other People in Household (VOTH27)** form for each individual who falls into this category, which can be found at: [financialaid.buffalostate.edu/forms](http://financialaid.buffalostate.edu/forms).

**IRS Tax Return Transcripts or W-2 Transcripts:**

If you don't have a copy of your tax return or W2 you can visit [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript).

For 2026-27, request records from 2024.

**SUBMIT THIS FORM AND ALL REQUIRED DOCUMENTS TO:**

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

Write the student's Banner ID on all other paperwork submitted.

## 2026-2027 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 complete the household chart below. List all children or other people living there if the household income provides more than half of their support from July 1, 2026 – June 30, 2027.

☐ **Dependent Students**

☐ **Independent Students**

Full Name of Household Member	Age	Relationship to Student
		Self

### C. Tax Filing Status for 2024 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 & 2. Independent students should complete Table 3, and if married, Table 4.

**Table 1: Dependent Student**

- ☐ I did not work.
- ☐ I worked but did not file a federal tax return and was not required to file. Submit your W-2 statements from 2024.
- ☐ I filed a 2024 federal tax return. Submit a copy of your signed 2024 federal tax return (pages 1 & 2 only) OR a [tax return transcript](#). Also submit Schedules 1, 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 2024. 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 federal tax return and were not required to file. Submit your parents' W-2 statements from 2024.
- ☐ My parents filed a 2024 federal tax return. Submit a copy of the signed 2024 federal tax return (pages 1 & 2 only) OR a [tax return transcript](#). Also submit Schedules 1, 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 2024.
- ☐ I worked but did not file a federal tax return and was not required to file. Submit your W-2 statements from 2024.
- ☐ I filed a 2024 federal tax return. Submit a copy of your signed 2024 federal tax return (pages 1 & 2 only) OR a [tax return transcript](#). Also submit Schedules 1, 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 they were supported in 2024.
- ☐ My spouse worked but did not file a federal tax return and was not required to file. Submit your spouse's W-2 statements from 2024.
- ☐ My spouse filed a 2024 federal tax return. Submit a copy of your spouse's signed 2024 federal tax return (pages 1 & 2 only) or [tax return transcript](#). Also submit Schedules 1, 3, C, and E if filed.

### D. Sign this Worksheet:

By signing this worksheet, I (we) certify that all 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