

Please complete all sections using INK.

A. Student Information

Student's Full Name _____

Student's ID Number _____

B. Student and Family Information

Dependent Students

List below the people in your parent(s)' household, including:

- Yourself and your parent(s) (including a stepparent) even if you do not 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, 2023 through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023–2024. 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 from July 1, 2023 through June 30, 2024.

Independent Students

List below the people in your household, including:

- Yourself and your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with you.
- 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.

Full Name	Age	Relationship	College Currently Attending (If Applicable)	Will be Enrolled at Least Half Time?
<i>(Example) Chris Jones</i>	<i>18</i>	<i>Student</i>	<i>SUNY Upstate</i>	<i>Yes</i>
1.		Self/Student	SUNY Upstate	
2.				
3.				
4.				
5.				
6.				

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

C. 2021 Income Verification

Instructions: Fill in **ONE** circle below for the Earnings & Tax Information description that best describes you. Required for student (Statement #s S1-S4) AND for parent of a dependent student or, if applicable, student's spouse (Statement #s PS1-PS4).

STUDENT		Earnings & Tax Information	PARENT OR SPOUSE	
S1.	<input type="radio"/>	<p>I filed a 2021 Federal Income Tax Return.</p> <p>Steps you must take: Submit required documentation listed on next page</p>	<input type="radio"/>	PS1.
S2.	<input type="radio"/>	<p>I worked in 2021, but was not required to file a 2021 Federal Income Tax Return</p> <p>Steps you must take: Submit required documentation listed on next page</p>	<input type="radio"/>	PS2.
S2. Part 2		Student	Parent or Spouse	PS2. Part 2
<i>Amount Earned</i>		<i>Source of Income</i>	<i>Amount Earned</i>	<i>Source of Income</i>
S3.	<input type="radio"/>	<p>I did not work in 2021 and was not required to a 2021 Federal Income Tax Return</p> <p>Steps you must take: Submit required documentation listed on next page</p>	<input type="radio"/>	PS3.
S4.	<input type="radio"/>	<p>I amended my 2021 Federal Income Tax Return using Form 1040X</p> <p>Steps you must take: Submit required documentation listed on next page</p>	<input type="radio"/>	PS4.

D. Certifications and Signatures

Each person signing this form certifies that all of the information reported is complete and correct. If the submitted FAFSA contains the parent or spouse's information, then the parent or spouse must also sign below. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

STUDENT

PARENT or SPOUSE (If Married)

Student Signature

Date

Parent or Spouse Signature

Date

Student Name (Please Print)

Parent or Spouse Name (Please Print)

**Submit this worksheet and all required documentation to the SUNY Upstate Financial Aid Office.
See next page for list of documentation to submit.**

Based on your responses on Page 2, please submit the appropriate documentation to the Financial Aid Office by uploading in your MyUpstate account, by mail, or fax. **DO NOT EMAIL TAX DOCUMENTS PLEASE** as they contain sensitive information and email is not secure.

Your Response from Page 2	REQUIRED DOCUMENTATION
<p>I filed a Federal Income Tax Return</p>	<ol style="list-style-type: none"> 1. SUNY Upstate Verification Worksheet 2. W2s for student, spouse if student is married, and parent(s) if student is dependent 3. If you didn't use the IRS Data Retrieval Tool on FAFSA and selected S1 and/or PS1 <ol style="list-style-type: none"> a. Signed copy of 1040 Federal Tax Return b. Schedules 1, 2, 3, C and E (if are applicable)
<p>I worked, but did not file and was not required to file a tax return</p>	<ol style="list-style-type: none"> 1. SUNY Upstate Verification Worksheet 2. W2s for student, spouse if student is married, and parent(s) if student is dependent 3. IRS Verification of Non-Filing Letter for those who filled in S2 and/or PS2 for: <ol style="list-style-type: none"> i. Yourself, if you are an independent student ii. Your spouse, if married and your spouse was not required to file iii. Your parent/step-parents(s) if they were not required to file <p>*** Dependent students who did not and were not required to file are not required to submit a Verification of Non-Filing Letter</p>
<p>I did not work, did not file and was not required to file a tax return</p>	<ol style="list-style-type: none"> 1. SUNY Upstate Verification Worksheet 2. IRS Verification of Non-Filing Letter for those who filled in S3 and/or PS3 for: <ol style="list-style-type: none"> i. Yourself, if you are an independent student ii. Your spouse, if married and your spouse was not required to file iii. Your parent/step-parents(s) if they were not required to file <p>*** Dependent students who did not and were not required to file are not required to submit a Verification of Non-Filing Letter</p>
<p>I amended/corrected my Tax Return using Form 1040X</p>	<ol style="list-style-type: none"> 1. SUNY Upstate Verification Worksheet 2. W2s for student, spouse if student is married, and parent(s) if student is dependent 3. If you didn't use the IRS Data Retrieval Tool on FAFSA and selected S4 and/or PS4 <ol style="list-style-type: none"> a. Signed copy of 1040 Federal Tax Return b. Schedules 1, 2, 3, C, E, and/or K-1 (if are applicable) 4. Signed copy of 1040X Amended Tax Return

Need help figuring out what documents to submit to our office or have a special circumstance? Schedule a virtual advisement and we can walk you through the process

Schedule an Advisement

<https://outlook.office365.com/owa/calendar/FinancialAidOffice@upstate.edu/bookings/>

Mailing Address:

Office of Financial Aid
 203 Campus Activities Building
 155 Elizabeth Blackwell Street
 Syracuse, NY 13210

Fax:

315-464-8822