

Please complete all sections using INK.

A. Student Information

Student's Last Name	Student's First Name	Student's M.I.	U00 Student's ID Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Preferred Phone Number

B. Student and Family Information

Dependent Students

List below the people who should be included in your parent(s) family size:

- 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, 2024 through June 30, 2025, or if the other children would be required to provide parental information if they were completing a FAFSA for 2024–2025. 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, 2024 through June 30, 2025.

List below the people who should be included in your family size:

- 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, 2024 through June 30, 2025, or if the child would be required to provide your information if they were completing a FAFSA for 2024–2025. 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 from July 1, 2024 through June 30, 2025.

Independent Students

Full Name	Age	Relationship	College Currently Attending (If Applicable)	Will be Enrolled at Least Half Time?
(Example) Chris Jones	18	Student	SUNY Poly	Yes
1.		Self/Student	SUNY Polytechnic Institute	
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.

Continued on next page (over)

C. 2022 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 2022 Federal Income Tax Return.</p> <p><u>Steps you must take:</u> See pages 3 – 5 for materials to submit to the Financial aid Office</p>	<input type="radio"/>	PS1.
S2.	<input type="radio"/>	<p>I worked in 2022, but have not filed a 2022 Federal Income Tax Return because I am not required to.</p> <p><u>Steps you must take:</u> : See pages 3 – 5 for materials to submit to the Financial aid Office</p>	<input type="radio"/>	PS2.
S2. Part 2 Student		Parent or Spouse		PS2. Part 2
<i>Amount Earned</i>		<i>Source of Income</i>		
S3.	<input type="radio"/>	<p>I did not work in 2022, and will not file a 2022 Federal Income Tax Return.</p> <p><u>Steps you must take:</u> : See pages 3 – 5 for materials to submit to the Financial aid Office</p>	<input type="radio"/>	PS3.
S4.	<input type="radio"/>	<p>I corrected my 2022 Federal Income Tax Return using an Amended Return (Form 1040X).</p> <p><u>Steps you must take:</u> : See pages 3 – 5 for materials to submit to the Financial aid Office</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 Poly Financial Aid Office.
See next pages for list of documentation to submit.**

Based on your responses on Page 2, please submit the appropriate documentation as listed below to the Financial Aid Office via the mail, fax: (315-792-7220), or scan/email as a PDF to: finaid@sunypoly.edu

Your Response from Page 2	REQUIRED DOCUMENTATION
<p>I filed a 2022 Federal Income Tax Return.</p>	<p>1) SUNY Poly Verification Worksheet 2) The following is needed for the person(s) who filled in S1 and/or PS1 and the income was unable to be transferred directly from the IRS into the application. a) Signed copy of the 2022 Federal Tax Return Form 1040 along with Schedules 1, 2 and 3 (whichever are applicable); OR b) A 2022 IRS Tax Return Transcript obtained directly from the IRS 3) Copy of original 2022 W2 form(s) OR a Wage and Tax Transcript obtained directly from the IRS. <i>*We reserve the right to ask for additional information such as: W2 form(s), Schedule C/C-EZ and/or Schedule K-1 (IRS Form 1065)</i></p>
<p>I worked in 2022, but have not filed a 2022 Federal Income Tax Return because I am not required to.</p>	<p>1) SUNY Poly Verification Worksheet 2) The following is needed for the person(s) who filled in S2 and/or PS2. a) A signed and dated statement certifying: i) That the individual is not required to file a 2022 income tax return; and ii) The sources and amounts of earnings, other income, and resources that supported the individual(s) for the tax year being verified; iii) A copy of the original IRS Form W-2 from each source of employment income received for the tax year being verified. b) For individuals without a Social Security number (SSN), Individual Taxpayer Identification Number (ITIN), or Employer Identification Number (EIN) a statement that states they do not have an SSN, ITIN, or EIN. c) An IRS Verification of Nonfiling Letter or other confirmation of nonfiling is required for a nontax filer who would file a tax return with a tax authority other than the Internal Revenue Service (IRS)</p>
<p>I did not work in 2022, and will not file a 2022 Federal Income Tax Return.</p>	<p>1) SUNY Poly Verification Worksheet 2) The following is needed for the person(s) who filled in S3 and/or PS3. a) A signed and dated statement certifying: i) That the individual is not required to file a 2022 income tax return; and ii) The sources and amounts of earnings, other income, and resources that supported the individual(s) for the tax year being verified; iii) A copy of the original IRS Form W-2 from each source of employment income received for the tax year being verified. b) For individuals without a Social Security number (SSN), Individual Taxpayer Identification Number (ITIN), or Employer Identification Number (EIN) a statement that states they do not have an SSN, ITIN, or EIN. c) An IRS Verification of Nonfiling Letter or other confirmation of nonfiling is required for a nontax filer who would file a tax return with a tax authority other than the Internal Revenue Service (IRS)</p>
<p>I corrected my 2022 Federal Income Tax Return using an Amended Return (Form 1040X).</p>	<p>1) SUNY Poly Verification Worksheet 2) The following is needed for the person(s) who filled in S4 and/or PS4 a) Signed copy of their original 2022 Federal Tax Return Form 1040 along with Schedules 1, 2 and 3 (whichever are applicable); OR b) A 2022 IRS Tax Return Transcript AND Tax Account Transcript c) Signed copy of the 2022 Amended Federal Tax Return 1040X. d) 2022 W2 form(s), Schedule C/C-EZ and/or Schedule K-1 (IRS Form 1065)</p>

Instructions for Requesting an IRS Tax Return Transcript

Online Request → www.irs.gov

- Click on "Get Your Tax Record". Be sure to disable pop-up blockers.
- Click on "Get Transcript Online"
- To use the online request service, 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).
- For the type of transcript, select "Tax **Return** Transcript" (**not** "Tax **Account** Transcript") and select the appropriate tax year.
- A copy of your IRS Tax Return Transcript or Non-filing letter should now be displayed as a PDF file.

Mail Request → www.irs.gov

- Click on "Get Your Tax Record". Be sure to disable pop-up blockers.
- Click on "Get Transcript by Mail"
- Enter the tax filer's social security number, date of birth, street address, and zip code. Use the address currently on file with the IRS, which is usually the address that was listed on the latest tax return filed. For a joint tax return, use the primary tax filer's SSN, date of birth and address.
- Click "Continue".
- For the type of transcript, select "Tax **Return** Transcript" (**not** "Tax **Account** Transcript") and select the appropriate tax year.
- If successfully validated, tax filers will receive a paper IRS Tax Return Transcript or Non-filing letter within 10 business days. Tax Return Transcripts requested online can only be mailed to the address on file with the IRS.

Telephone Request → (800) 908-9946

- Tax filers must follow prompts to enter their social security number and numbers in their street address.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter the year desired.
- If successfully validated, tax filers will receive the paper transcript within 10 business days.

Paper Request Form → IRS Form 4506-T

- Download a PDF of the 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Complete lines 1-4, following the instructions on page 2 of the form.
- On line 6, enter the tax form number requested (1040)
- Check the box on **6a Return Transcript** to request the IRS Tax Return Transcript.
- On line 9, enter the appropriate date that has been requested (12/31/20**).
- Check off the box that says "**Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.**"
- Sign and date the form and enter phone number of taxpayer
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of the form.
- Tax filers should receive their transcripts/letters within 10 business days from the date the IRS receives the form.

How to Get an IRS Verification of Non-Filing Letter

What is an IRS Verification of Non-filing Letter?

An IRS Verification of Non-filing Letter – provides proof that the IRS has no record of a filed Form 1040.

How can I get a Non-filing Letter?

You can request an IRS Verification of Non-filing letter, free of charge, from the IRS in one of two ways: Request online or by paper using IRS Form 4506-T.

Online Request → www.irs.gov

- Click on "Get Your Tax Record". Be sure to disable pop-up blockers.
- Click "Get Transcript ONLINE" (You will be required to validate your identity via financial verification data– for example, you must provide mortgage, credit card information or a mobile phone account in your name)
- Follow the on screen prompts to verify your identity.
- Click "Continue" and select "Higher Education/Student Aid" as the reason for requesting the transcript.
- Select "Verification of Non-Filing Letter" and in the "Tax Year" field select the year the Financial Aid Office is requesting.
- If successfully validated, you will be able to view and print your IRS Verification of Non-filing Letter.
- The non-filer must submit the IRS Verification of Non-filing Letter to the SUNY Poly Financial Aid Office. Please include your SUNY Poly Student ID (if known) on the form.

Paper Request Form → IRS Form 4506-T

- Complete and download IRS Form 4506-T at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Complete lines 1-4, following the instructions on page 2 of the form.
- Line 7: Select the checkbox on the right hand side for Verification of Non-filing.
- Line 9: In the Year or Period Requested field enter the last day of the tax year (12/31/20**).
- Check off the box that says **"Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T."**
- The non-filer must sign and date the form and enter their telephone number.
- Mail or fax the completed IRS Form 4506-T to the address (or FAX number) provided on page 2 of the form.
- Tax filers can expect to receive a paper IRS Verification of Non-filing Letter at the address provided on their request within 10 days.

The non-filer must submit the IRS Verification of Non-filing Letter to the SUNY Poly Financial Aid Office. Please include your SUNY Poly Student ID (if known) on the form.