



ST. LAWRENCE UNIVERSITY

2023-2024 Financial Aid Dependent Verification Worksheet (V5)

Complete all sections (A-H). If a section does not apply, enter "NA" - **do not leave any section blank.**

A. Student Information

Last Name First Name M.I.

SLU ID#

Address

Home Phone (include area code)

City State ZIP Code

Cell Phone (include area code)

B. Family Household Information

Number of Household Members: List below the people in the custodial parent's household: Include:

- The student.
- The custodial parents (including stepparent) even if the student does not live with the parents.
- The parents' other children if the parents will provide more than half of the children's 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 the child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2024.

Number in College: Include in the space below information about any household member, excluding the parents, who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024, and include the name of the college.

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

Full Name	Age	Relationship	College (enrolled at least half-time)	If attending graduate school will parents support more than 50%?
		Self	St. Lawrence University	NA
		Parent/Step-parent	NA	NA
		Parent/Step-parent	NA	NA
		Sibling/Other		
		Sibling/Other		
		Sibling/Other		
		Sibling/Other		

Note: We may require additional documentation if we have reason to believe that the information regarding household members enrolled in eligible postsecondary educational institutions is inaccurate.

C. Student's Tax Filers

Instructions: This section applies to the student. Check the appropriate box below that describes your 2021 tax filing status.

- ☐ The student did not file a 2021 tax return (Proceed to Section D).
- ☐ The student has used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA. Submit a copy of all 2021 W-2 forms.
- ☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA. Submit a copy of all 2021 W-2 forms.
- ☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with **a signed copy of the 2021 income tax return and applicable schedules or a 2021 IRS Tax Return Transcript(s), as well as all 2021 W-2 forms.**

A **2021 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 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.

Student Name: _____

D. Student Nontax Filers

Instructions: This section applies to the student. Complete this section if the student did not file and was not required to file a 2021 income tax return with the IRS.

☐ The student was not employed and had no income earned from work in 2021.

☐ The student was employed in 2021 and has listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2021 IRS W-2 forms issued by the 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	Annual Amount Earned in 2021	W-2 Received?
<i>(Example) ABC's Auto Body Shop</i>	<i>\$4,500.00</i>	<i>Yes</i>
Total Amount of Income Earned From Work	\$	

E. 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 2021 or had a change in marital status after December 31, 2021.

Instructions: Complete this section if the parents filed or will file a 2021 IRS income tax return(s)

Check the box that applies:

- ☐ The parents did not file a 2021 tax return (Proceed to Section F).
- ☐ The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2021 IRS income tax return information into the student's FAFSA. Submit a copy of all 2021 W-2 forms.
- ☐ The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA. Submit a copy of all 2021 W-2 forms.
- ☐ The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the institution with **a signed copy of the 2021 income tax return and applicable schedules or a 2021 IRS Tax Return Transcript(s), as well as all 2021 W-2 forms.**

A **2021 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 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.

If the parents filed separate 2021 IRS income tax returns, the IRS DRT cannot be used and **a signed copy of the 2021 income tax return and applicable schedules or a 2021 IRS Tax Return Transcript(s)** must be provided for each.

Student Name: _____

F. Parent Nontax Filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents did not file and were not required to file a 2021 income tax return with the IRS.

Check the box that applies:

- ☐ Neither parent was employed and neither had income earned from work in 2021.
☐ Submit a "Verification of Non-filing Letter" from the IRS (see instructions below).
- ☐ One or both parents were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 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.
☐ Submit a "Verification of Non-filing Letter" from the IRS (see instructions below).

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

Employer	Annual Amount Earned in 2021	W-2 Received?
(Example) ABC's Auto Body Shop	\$4,500.00	Yes
Total Amount of Income Earned From Work	\$	

How to obtain a "Verification of Non-filing Letter" from the IRS.

- Go to www.irs.gov; click "Get Your Tax Record". Click "Get Transcript Online" and request "Verification of Non-filing Letter". To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone 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.
- OR submit paper request Form 4506-T to the IRS. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

G. Verification of Identity and Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at the St. Lawrence University Financial Aid Office to verify their identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary)

If the student is unable to appear in person at the St. Lawrence University Financial Aid Office to verify their identity, the student must provide to the institution:

- a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
- b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Student Name: _____

Statement of Educational Purpose

I certify that I, _____, am the individual signing this Statement of
(Print Student's Name)

Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending St. Lawrence University for 2023-2024.

(Student's Signature)

(Date)

(Student's ID Number)

Notary's Certificate of Acknowledgement

State of _____

City/County of _____

On _____, before me, _____
(Date) (Notary's Name)

personally appeared, _____, and proved to me

(Printed name of signer)

on basis of satisfactory evidence of identification _____

(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on _____
(Date)

H. Certification and Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student Signature

Date

Parent Signature

Date

WARNING

If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Submittal Information

**St. Lawrence University
Office of Financial Aid
23 Romoda Drive
Canton, NY 13617**