

Office of Financial Aid

2023-2024 V5 Independent Worksheet

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for a review process called Federal Verification. Federal policy states that before awarding Federal Student Aid, we may ask you to confirm the information that you reported on your FAFSA. You must complete and sign this form and submit all required documents to Student Financial Aid. If you have any questions, please contact our office as soon as possible. Please complete this form in its entirety. You may indicate "N/A" for items that are not applicable and/or "0" (zero) for fields that have no relevant value. Student Financial Aid may need to collect further information as needed

A. Independent Student's Information						
Name (Last, First, Middle Initial)		Hartwick ID				
Address	Phone	Hartwick Email				

B. Household Members and Number in College

Please list below the people in the **student's household**. Include:

- The student
- The student's spouse, if the student is married
- The student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2023 through June 30, 2024, even if the child does not live with the student.
- Other people if they now live with the student and the student or spouse provides 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..

Write the name of the college for any household member, who will be attending college at least half time, in a program that leads to a college degree or certificate any time between July 1, 2023 and June 30, 2024. Only list the college if it is an institution in the US.

Full Name	Age	Relationship	College	Enrolled at least ½ time?
		Yourself	Hartwick College	

C. Independent Student's/Spouse's Income (Complete Section 1 or 2)

Section 1. If you completed a 2021	. Federal Income Tax Return check	only one box below			
If the student and spouse file separ	rate 2021 IRS income tax returns, a	2021 IRS Tax Return Transcript mu	ist be provided		
for both.					
Check here if you (student when making corrections t	and spouse) completed the IRS dat o the FAFSA.	a retrieval process either on your i	nitial FAFSA or		
• •	and spouse) are attaching a copy o Income Tax Return, including Scheo	·	ipt <i>or</i> a signed		
Section 2. If you did not file and are not required to file a 2021 Federal Income Tax Return check only one box below:					
The student (spouse) was not employed and had no income earned from work in 2021.					
The student (spouse) was earned from each employer in 202	employed in 2021 and has listed be 1, and whether an IRS W-2 or 1099	• • •			
2 and/or 1099 forms issued to the	student. List every employer even i	f the employer did not provide an I	RS W-2 or 1099		
form. Provide a signed statement e	explaining the reason if unable to ol	btain an IRS W-2 or 1099 form for i	ncome earned		
from employer. If more space is ne	eded, attach a separate page with	the student's name and ID number	at the top.		
(Do not complete if you are a tax filer)					
Employer's Name	2021 Amount Earned	IRS W-2 or 1099			
]		

If the student and/or spouse did not file a 2021 income tax return with the IRS, provide "Verification of Nonfiling Letter" from the IRS. See instructions below on how to obtain this

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

The student must appear in person at Hartwick College to verify his or her 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
- valid 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.

Statement of Educational Purpose

I certify that I		am the individual signing		
-	(Print Student's Name			
this Statemen	nt of Educational Purpose and tha	t the Federal student financial	assistance I may receive will only be used	
for education	al purposes and to pay the cost o	f attending Hartwick College fo	or the 2023–2024 year.	
Student's Sigr	nature	_		
Student's ID N	Number	Date		
Financial Aid A	Administrator	Date		
			le a notarized Statement of Educational	
•		_	for your non-availability. Please contact th	
Financial Aid (Office if you are unable to comple	ete this form in person.		
	on and Signatures			
•		•	is complete and correct. The student and	
spouse in the	primary household must sign (no	ot electronic or digital) and dat	e below.	
				
	Student's Signature	Dat	e	
	Spouse's Signature	Dat	ce control of the con	

INDEPENDENT STUDENTS (NOT REQUIRED TO FILE): HOW TO OBTAIN THE IRS NON-FILING LETTER

- a. Go to www.irs.gov, click "Get Your Tax Record."
- b. Click "Get Transcript ONLINE" (If at any point, you cannot validate your identity for example you cannot provide financial verification information or you lack access to a mobile phone you will need to use the Get Transcript by MAIL option, see below for instructions).
- c. Enter the non-filer's Social Security Number (you can use your ITIN or EIN), e-mail address, filing status, account numbers for loan or credit card associated with your name, and mobile phone associate with your name. This information will be used to verify your identity with the IRS.
 - d. Click "Continue".
- e. Select "Verification of Non-filing Letter" for TAX YEAR 2021 f. If successfully validated, you will be able to view your IRS Verification of Non-filing letter that you can print for submission.

IRS DRT INSTRUCTIONS

If you have questions or need assistance, you may contact the FAFSA Helpline at 1-800-433-3243. Live agents are available to walk you through this process.

- a. Log in to your current FAFSA form or start a new application at studentaid.gov
- b. In the finances section of the online form, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.
- c. Click the "Link to IRS" button and log in with your FSA ID to be transferred to the IRS to retrieve your information.
- d. Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the "Submit" button. e. Check the "Transfer My Tax Information into the FAFSA form" box, and click the "Transfer Now" button.
- f. You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA form.

REQUEST TRANSCRIPT ONLINE

- a. Go to www.irs.gov, click "Get Your Tax Record."
- b. Click "Get Transcript Online." Make sure to request "Tax Return Transcript and NOT the "Account Transcript."
- c. To use the Get Transcript Online tool, 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.)
- d. The transcript displays online upon successful completion of the IRS's two-step authentication.