

## Providing Income and Tax Information When Your FAFSA is Selected for Verification

Some students who complete a Free Application for Federal Student Aid (FAFSA) will be selected for a process called **verification**. Many of these students need to verify income and tax information for themselves for a specific tax year. In addition, income & tax information for the student's spouse (if the student is married) or for the student's parents (if the student is considered "dependent") may be required.

*The college cannot complete verification and disburse aid until all required information is received and reviewed.*

For those who report that they have filed or will file federal income tax returns, the best way to verify income and tax information is by using the **IRS Data Retrieval Tool (IRS DRT)** that is part of FAFSA on the Web at [www.FAFSA.ed.gov](http://www.FAFSA.ed.gov). In most cases, no further documentation is needed to verify income information that was transferred into the student's FAFSA using the IRS DRT so long as that information was not changed once it was imported.

### How to use the IRS DRT to update your FAFSA once an income tax return has been processed by the IRS:

1. Go to [www.FAFSA.ed.gov](http://www.FAFSA.ed.gov) and log into your FAFSA record
2. Select "Make FAFSA Corrections"
3. Navigate to the Financial Information section of the FAFSA
4. In the Tax Information section(s), follow the instructions to determine eligibility to use the IRS DRT
5. If eligible, follow the directions to link to the IRS
6. Provide the filer's Social Security Number, birth date, and address used when filing
7. Follow the instructions to transfer IRS income tax return information into the FAFSA

If the student or parent is unable to use the IRS DRT, must change the information that is imported, or chooses not to use the IRS DRT in FAFSA on the Web, an **IRS Tax Return Transcript**—not a photocopy of the income tax return- must be provided to the Financial Aid Office.

### How to Obtain an IRS Tax Return Transcript:

- RECOMMENDED Telephone Request: 1-800-908-9946
- Online Request : [www.IRS.gov](http://www.IRS.gov)
  - Under the Tools section on the IRS homepage, click "Get A Tax Transcript"
  - Click "Get Transcript by MAIL"
  - Provide the filer's Social Security Number, date of birth, and address info used when filing
  - Request the "Tax **Return** Transcript" - NOT the "Tax Account Transcript" – for the specified year
- Paper Request Form: IRS Form 4506T-EZ or IRS Form 4506-T

### Availability of IRS DRT and Tax Return Transcripts:

The majority of electronic tax return filers will have information available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after their electronic tax returns has been accepted by the IRS. Availability takes 6-8 weeks for paper tax return filers. Additional time may be required if income tax is owed.

*Plan ahead – File your taxes early to allow for sufficient time to complete financial aid processes.*

### Special Cases: (Contact the Financial Aid Office at your college if you require additional assistance)

- If the student or parent made a mistake on the FAFSA and will not file, simply correct the information online.
  - Log into [www.FAFSA.ed.gov](http://www.FAFSA.ed.gov), select "Make FAFSA Corrections," and update as needed.
- Notify the Financial Aid Office if you, the student (if married) or your parents (if you are a dependent student) had a **change in marital status** after December 31, 2015 – or- if any **married tax filer filed separately**.
- If an **amended** (i.e., changed) IRS income tax return has been or will be filed, provide a signed copy of the IRS Form 1040X "Amended US Individual Income Tax Return" **AND** an IRS Tax Return Transcript.
- For IRS filing **extensions**, provide a copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," **AND** copies of all IRS Forms W-2 for each source of employment income, **AND/OR**, if self-employed, a signed statement certifying the estimated amount of Adjusted Gross Income (AGI).
- For victims of **IRS tax-related identity theft**, provide a Tax Return Database View (TRDBV) transcript **AND** a signed & dated statement about the situation and affirming the IRS is aware of the problem.
  - Victims of tax-related ID theft should call the IRS' Identity Protection Specialized Unit at 1-800-908-4490.



Student's Name: \_\_\_\_\_ Student/ Banner ID: \_\_\_\_\_

**C. Verification of 2015 Income Information for Dependent Student Tax Return Filers**

**Instructions:** Complete this section only if the student, filed or will file a 2015 IRS income tax return.

*In general, the best way to verify income is by using the **IRS Data Retrieval Tool (IRS DRT)** that is part of FAFSA on the Web at [www.FAFSA.gov](http://www.FAFSA.gov). In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT so long as that information was not changed by the FAFSA filer.*

**For Tax Return Filers, check the box below that applies:**

- The student has already used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA and has made no changes to that IRS data.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS tax return has been filed and processed.
- The student changed imported data, is unable to use the IRS DRT, or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript** which may be requested on [www.IRS.gov](http://www.IRS.gov).  
Note: This is **not** a photocopy of the income tax return.

\_\_\_ Check here if the student's IRS Tax Return Transcript is included with this worksheet.

\_\_\_ Check here if the student's IRS Tax Return Transcript will be submitted to the school later.

*For more information, see separate document Providing Income and Tax Information When Your FAFSA is Selected for Verification*

Skip Section "D" below if you, the student, filed/ will file a 2015 IRS Income Tax Return.

**D. Verification of 2015 Income Information for Dependent Student Who is Not Required to File a Tax Return**

**Instructions:** Complete this section only if the student will not file AND is not required to file a 2015 IRS income tax return. For information about filing requirements, review "Do I Need to File a Tax Return?" on [www.IRS.gov](http://www.IRS.gov).

**For Non-Filers, check the box below that applies:**

- The student was not employed and had no income earned from work in 2015.
- The student did not file and was not required to file, but was employed in 2015 and has listed in the chart below the names of all the student's employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is included.

**Provide copies of all 2015 IRS W-2 forms issued to the student by employers.**

**List every employer below, even if they did not issue an IRS W-2 form.**

*If more space is needed, include an additional page with the student's name and Student ID # at the top.*

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>(example) Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

Note: You may be required to provide documentation from the IRS to confirm an income tax return was not filed.

**Please do not forget to sign and date the last page of this document.**

Student's Name: \_\_\_\_\_ Student/ Banner ID: \_\_\_\_\_

**E. Verification of 2015 Income Information for Parent Tax Return Filers**

**Instructions:** Complete this section only if the parent(s), filed or will file a 2015 IRS income tax return.

*In general, the best way to verify income is by using the **IRS Data Retrieval Tool (IRS DRT)** that is part of FAFSA on the Web at [www.FAFSA.gov](http://www.FAFSA.gov). In most cases, no further documentation is needed to verify 2015 income information that was transferred into the student's FAFSA using the IRS DRT so long as that information was not changed by the FAFSA filer.*

**For Tax Return Filers, check the box below that applies:**

- The parent(s) have already used the IRS DRT in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA and have made no changes to that IRS data.
- The parent(s) have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA once the 2015 IRS tax return has been filed and processed.
- The parent(s) changed imported data, are unable to use the IRS DRT, or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2015 IRS Tax Return Transcript** which may be requested on [www.IRS.gov](http://www.IRS.gov). Note: This is **not** a photocopy of the income tax return.

\_\_\_ Check here if the parent(s)' IRS Tax Return Transcript is included with this worksheet.

\_\_\_ Check here if the parent(s)' IRS Tax Return Transcript will be submitted to the school later.

*For more information, see separate document Providing Income and Tax Information When Your FAFSA is Selected for Verification*

Skip Section "F" below if the parent(s) filed/ will file a 2015 IRS Income Tax Return.

**F. Verification of 2015 Income Information for Parent(s) Who are Not Required to File a Tax Return**

**Instructions:** Complete this section only if the parent(s) will not file AND are not required to file a 2015 IRS income tax return. For information about filing requirements, review "Do I Need to File a Tax Return?" on [www.IRS.gov](http://www.IRS.gov).

**For Non-Filers, check the box below that applies:**

- The parent(s) were not employed and had no income earned from work in 2015.
- The parent(s) did not file and were not required to file, but were employed in 2015 and have listed in the chart below the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is included.

**Provide copies of all 2015 IRS W-2 forms issued to the parent(s) by employers.**

**List every employer below, even if they did not issue an IRS W-2 form.**

*If more space is needed, include an additional page with the student's name and Student ID # at the top.*

Employer's Name	2015 Amount Earned	IRS W-2 Provided?
<i>(example) Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

Note: You may be required to provide documentation from the IRS to confirm an income tax return was not filed.

**Please do not forget to sign and date the last page of this document.**

Student's Name: \_\_\_\_\_ Student/ Banner ID: \_\_\_\_\_

**G. Receipt of SNAP Benefits**

**Instructions:** This section must be completed if you reported on your FAFSA that someone in the student's parent's household received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2014 or 2015 calendar years.

**Check the box that applies:**

- YES, a member of the student's parent(s)' household received SNAP benefits sometime during 2014 or 2015. If asked by the college, documentation of the receipt of SNAP benefits during 2014 and/or 2015 will be provided.
- NO, no member of the student's parent(s)' household received SNAP benefits in 2014 or 2015.

**Note:** SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243).

**H. Child Support Paid**

**Instructions:** This section must be completed if you reported child support paid in 2015 on your FAFSA. If one or both of the parents included in the household and/or the student paid child support in 2015, provide in the table below the name(s) of the person(s) who paid the child support, the name(s) of the person(s) to whom the child support was paid, the names and ages of the children for whom the child support was paid, and the total annual amount of child support that was paid in 2015 for each child. If no child support was paid, indicate \$0 or N/A.

*Do NOT include child support received in this section – only that which was paid.*

*If more space is needed, include an additional page with the student's name and Student ID # at the top.*

<b>Name of Person in Household Who Paid Child Support</b>	<b>Name of Person to Whom Child Support was Paid</b>	<b>Name &amp; Age of Child for Whom Support Was Paid</b>	<b>Amount of Child Support Paid in 2015</b>
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones, 2 years</i>	<i>\$6,000.00</i>
		<b>Total Paid in 2015:</b>	

Note: In certain cases, the school may request additional documentation to verify child support paid.

**Please do not forget to sign and date the last page of this document.**

Student's Name: \_\_\_\_\_ Student/ Banner ID: \_\_\_\_\_

**I. Certification and Signatures**

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

The student and one parent whose information is reported on the FAFSA must sign and date below.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date

*Submit this worksheet and any other required documentation to the financial aid administrator at your school.*

*Illegible or missing information will delay processing and awarding of financial aid.  
Ensure that all relevant sections are completed. If a section does not apply to you, mark it as "N/A" or "Not Applicable."*

## Report of Other Untaxed Income in 2015 for Families of Dependent Students

### Student Information:

Last Name	First Name	Middle Initial	Student/Banner ID Number

**Instructions:** If the student and/or parent(s) received any of the following untaxed income in 2015, please indicate the source of the income and provide the amounts in the appropriate table below.

If any item does not apply, enter "N/A" or \$0. If more space is needed, include a separate page with the student's name and Student ID # at the top.

*Submit this form and any other required documentation to the financial aid administrator at your school.*

**Provide copies of all 2015 IRS W-2 forms issued to the student and parent(s) by employers.**

### A. Payments to tax-deferred pension and retirement savings plans

List payments (direct or withheld from earnings) to tax-deferred pension & retirement savings plans (e.g., 401(k) or 403(b)), including, but not limited to, amounts reported on W-2 forms in boxes 12a through 12d (codes D, E, F, G, H, & S)

Name of Household Member Who Made the Payment	Annual Amount Paid in 2015

### B. Child support received for children in household

List the actual amount of any child support received in 2015 for the children in your household.

**Do not include** foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child(ren) For Whom Support Was Received	Annual amount of Child Support Received in 2015

### C. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the cash value of benefits received.

**Do not include** the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Annual Amount Received in 2015

Please do not forget to complete, sign, and date the back page of this document.

Student's Name: \_\_\_\_\_ Student/ Banner ID: \_\_\_\_\_

**D. Veterans non-education benefits received in 2015**

Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

**Do not include** federal veterans educational benefits such as: Post-9/11 GI Bill, Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits

Name of Recipient	Type of Veteran's Non-education Benefit	Annual Amount Received in 2015

**E. Additional untaxed income**

List the amount of any other untaxed income not reported elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, health savings account deductions (IRS Form 1040 Line 25), Railroad Retirement Benefits, etc.

**Do not include** foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Innovation & Opportunity Act (WIOA) educational benefits, on-base military housing, military housing allowances, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

**Do not include** income you were directed NOT to report elsewhere on this form.

Name of Recipient	Source/Type of Other Untaxed Income	Annual Amount Received in 2015

**F. Money received or paid on the student's behalf**

List the amount of cash support the student received including direct payment of the student's bills not otherwise reported. Include support from a parent whose information was not reported on the student's FAFSA. Include distributions to the student from a 529 plan owned by someone other than the student or the student's parent(s).

**Do not include** support & payments from the parent(s) whose information was reported on the student's 2016-2017 FAFSA.

Source/ Person Who Provided Cash Support/ Paid Student's Bill	Annual Amount Received in 2015

**Certification and Signatures**

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

**WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date