



### C. Income and Financial Information to Be Verified

Check this box IF A TAX RETURN WAS FILED and complete the section below. If you (and your spouse or parents, if applicable) filed a 2015 tax return, check all the boxes that apply (see additional instructions included with worksheet).

STUDENT	SPOUSE	PARENT	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2015 IRS income tax info to the FAFSA when I first submitted the FAFSA.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>did not use</u> the IRS DRT in <i>FAFSA on the Web</i> when FAFSA was first submitted, <u>but used</u> DRT to transfer income tax info to the FAFSA on (MM/DD/YY) ____/____/____.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>is unable or chose not to use</u> the IRS DRT and <u>has included</u> a 2015 <u>IRS Tax Return Transcript</u> along with this worksheet to the college financial aid office.

Check this box IF A TAX RETURN WAS NOT FILED and complete the section below. If you (and your spouse or parents, if applicable) are not required to file a 2015 federal tax return, check all the boxes that apply.

STUDENT	SPOUSE	PARENT	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>was not employed</u> , earned no income from work, and was not required to file a 2015 tax return.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>was employed and earned income</u> from work in 2015 but <u>was not required to file</u> a tax return. List <b>all</b> employers in the section below even if you did not receive a W-2 Form. <b>Attach all W-2 forms received.</b> <i>Attach a separate sheet if more space is needed.</i>

Employee Name	Employer Name	2015 Amount Earned	W-2 Form Received?
<i>(example) John Doe</i>	<i>Bob's Chicken Hut</i>	<i>\$2000</i>	<i>(Yes or No)</i>

### D. Certification and Signatures

Each person signing this worksheet certifies that all information reported on it is complete and correct. If student is dependent, at least one parent must sign.

Your financial aid cannot be processed until the financial aid office receives the required Verification documents. Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668), and submit corrections if necessary.

**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 (Dependent Students Only)

\_\_\_\_\_  
Date

## 2017-2018 INSTRUCTIONS FOR VERIFYING TAX INFORMATION

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to [www.fafsa.gov](http://www.fafsa.gov), log in and select "Make FAFSA Corrections." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2015 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you **must** obtain an IRS tax return transcript (copies of your original Form 1040 tax return are not acceptable for verification purposes). In **most** cases, for electronic filers, a 2015 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available.

To request an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, and click "Get a Tax Transcript by Mail." Make sure you request the "**IRS Tax Return Transcript**" and **NOT** the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the 2015 tax return and the address on file with the IRS (the address used when your 2015 IRS tax return was filed). Provide the transcript to the financial aid office along with your Verification Worksheet.

If you are unable or choose not to use the DRT and cannot access your IRS transcript online, you must call the IRS at 1-800-908-9946 to receive a transcript.

### Special Situations:

**Amended Returns** - If you filed an amended tax return, you must submit an IRS Tax Return Transcript **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return," along with your completed Verification Worksheet.

**Victims of IRS Identity Theft** - A victim of IRS tax-related identity theft must provide a Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript that includes all of the income and tax information required to be verified **AND** a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

**Non-IRS Income Tax Returns** - An individual who filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a transcript that was obtained at no cost from the relevant taxing authority that includes all of the tax filer's income and tax information required to be verified for the 2015 tax year **OR** a signed copy of the 2015 income tax return along with the Verification Worksheet.

**Filing Extensions** – An individual who has been granted a filing extension by the IRS must provide a copy of IRS 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for the 2015 tax year, a copy of the IRS's approval of an extension, **AND** a copy of the W-2 for each source of employment income received for the 2015 tax year and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for the 2015 tax year.