

Student's Name: _____ Student/ Banner ID: _____

C. Independent Student's Income Information (and Spouse's, if Married) for Tax Return Filers

Instructions: Complete this section if the student (and spouse, if the student is married) filed or will file a 2014 IRS income tax return. Notify the financial aid office if the student had a change in marital status after December 31, 2014.

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 FAFSA.gov. In most cases, no further documentation is needed to verify 2014 income information that was transferred into the student's FAFSA using the IRS DRT so long as that information was not changed.

In most cases, for electronic tax return filers, 2014 information is available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after the electronic return has been accepted by the IRS. Availability takes 8-11 weeks for paper tax return filers. Additional time may be required if income tax is owed. If you need more information about use of the IRS DRT or how to obtain the IRS Tax Return Transcript, see the directions below or contact your financial aid administrator.

Check the box that applies:

- ☐ The student has already used the IRS DRT in *FAFSA on the Web* to transfer 2014 IRS income information into the student's FAFSA and has made no further changes to the IRS data.
The school will use this IRS information in the verification process.
- ☐ The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS tax return has been filed and processed.
The school cannot complete verification until unchanged IRS information has been transferred into the FAFSA.

How to use the IRS DRT once your 2014 IRS income tax return has been processed:

- Go to FAFSA.gov and log into your FAFSA record
 - Select "Make FAFSA Corrections"
 - Navigate to the Financial Information section of the FAFSA
 - In the student Tax Information section, follow the instructions to determine eligibility to use the IRS DRT
 - Follow the directions to link to the IRS; Provide the filer's SSN, birth date, and address used when filing
 - Follow the instructions to transfer IRS income tax return information into the FAFSA
- ☐ The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2014 IRS Tax Return Transcript**—not a photocopy of the income tax return.
Verification cannot be completed until the IRS Tax Return Transcript has been submitted to the student's school.

If the student and spouse filed separate tax returns, 2014 IRS Tax Return Transcripts must be provided for each.

A 2014 IRS Tax Return Transcript may be obtained through:

- Online Request :
 - Go to www.IRS.gov
 - Under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records"
 - Click "Get Transcript ONLINE" or "Get Transcript by MAIL"
 - Make sure to request the "IRS Tax Return Transcript" - NOT the "IRS Tax Account Transcript"
 - Provide the filer's Social Security Number, date of birth, and address used when filing.
- IRS2Go App:
 - Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
 - Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- Telephone Request: 1-800-908-9946
- Paper Request Form: IRS Form 4506T-EZ or IRS Form 4506-T

☐ *Check here if a 2014 IRS Tax Return Transcript is attached to this worksheet.*

☐ *Check here if a 2014 IRS Tax Return Transcript will be submitted to the school later.*

Important Notes: If an amended 2014 IRS tax return has been or will be filed, provide a signed copy of the 2014 IRS Form 1040X AND a signed copy of the original 2014 tax return filed with the IRS or a 2014 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 2014 IRS Forms W-2 for each source of employment income, AND/OR, if self-employed, a signed statement certifying the amount of Adjusted Gross Income (AGI) and U.S. income tax paid for 2014.

Student's Name: _____ Student/ Banner ID: _____

D. Independent Student's Income Information (and Spouse's, if Married) for Non-Filers

Instructions: Complete this section if the student (and spouse, if the student is married) will not file AND are not required to file a 2014 IRS income tax return. For information about filing requirements, review "Do I Need to File a Tax Return?" on the IRS.gov website at <http://www.irs.gov/uac/Do-I-Need-to-File-a-Tax-Return%3F>

Check the box that applies:

- ☐ The student and spouse were not employed and had no income earned from work in 2014.
- ☐ The student and/or spouse were employed in 2014 and have listed below the names of all employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is attached.

Attach copies of all 2014 IRS W-2 forms issued to the student and spouse by employers.

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

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

Employer's Name	2014 Amount Earned	IRS W-2 Attached?
<i>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 that indicates a 2014 IRS income tax return was not filed.

Student's Name: _____ Student/ Banner ID: _____

E. Receipt of SNAP Benefits

Instructions: This section must be completed if someone in the student's household received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2013 or 2014 calendar years.

Check the box that applies:

- ☐ Yes, a member of the student's household received SNAP benefits sometime during 2013 or 2014. If asked by the student's school, documentation of the receipt of SNAP benefits during 2013 and/or 2014 will be provided.
- ☐ No, no member of the student's household received SNAP benefits in 2013 or 2014.

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).

F. Child Support Paid by Independent Student (and Spouse, if Married)

Instructions: If the student and/or spouse (who is a member of the student's household) paid child support in 2014, provide in the table below the names of the persons who paid the child support, the names of the persons 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 2014 for each child. If no child support was paid, indicate \$0 or N/A.

If you need more space, attach a separate page that includes the student's name and Student ID # at the top.

Name of Person in Household Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name & Age of Child for Whom Support Was Paid	Amount of Child Support Paid in 2014
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones, 2 years</i>	<i>\$6,000.00</i>
		Total Paid in 2014:	

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

G. Certification and Signatures

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 provided 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

Spouse's Signature (Optional)

Date

*Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.
You should make a copy of this worksheet for your records.*