

Office of Financial Aid
2016-2017 Student Tax Worksheet

The information requested on this form is needed to process your application for financial aid for the 2016-2017 school year. Complete this form and return it to the Office of Financial Aid so your application can be processed. If you have been notified that you must complete this form and fail to do so, you may jeopardize your eligibility for financial aid. Please print. **Incomplete forms will be destroyed.**

Student Last Name _____ First Name _____ XXX-XX _____
 SSN: (last four digits) _____
 Date of Birth _____ Name of Spouse, if married _____

Do NOT submit this form without the required documentation or until the IRS Data Retrieval has been completed.

Choose One	2015 Tax Filing Status	Required Documentation								
	I/We will file a 2015 tax return.	This form CANNOT be submitted until your taxes have been filed and processed by the IRS.								
<input type="checkbox"/>	I/We have filed a 2015 tax return.	<input type="checkbox"/> IRS Data Retrieval Tool* used on FAFSA _____ date completed OR <input type="checkbox"/> Tax Return Transcript** AND W-2s or a copy of Schedule C if self-employed								
<input type="checkbox"/>	I/We will not file and are not required to file taxes for 2015.	List all sources and amounts of income received in 2015 (for student and spouse, if married) and attach copies of W-2 forms . Do NOT leave blank. <i>Write zero or none, if applicable.</i> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; text-align: right;">Amount</td> <td style="width: 40%; text-align: left;">Source</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> </table>	Amount	Source	_____	_____	_____	_____	_____	_____
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***IRS Data Retrieval Tool:** Log into www.fafsa.gov and choose "Corrections." In the Financial Information section, use the IRS Data Retrieval Tool to transfer your 2015 IRS income information. Your IRS income information is available **two weeks** after filing electronically and **eight weeks** after filing a paper return. If you have any difficulty using this tool, call FAFSA for support at 800-433-3243.

****Tax Return Transcript:** Request your 2015 tax return transcript (not a tax account transcript) from the IRS and provide it to the office of financial aid. Visit <http://www.irs.gov/Individuals/Get-Transcript> to make the request.

I certify that this information provided on this page is correct.

Student Signature _____

Date _____

The **IRS Data Retrieval Tool** will *not* be available under the following circumstances and additional action or documentation may be required:

Circumstance	Required Action and/or Documentation
A joint tax return was filed for 2015 and the student or the student's parents have filed the FAFSA with a marital status of separated, divorced or widowed.	<ul style="list-style-type: none"> • Tax Return Transcript • W-2 for person whose information is being used to determine financial aid eligibility
The tax filer is married to someone other than the individual included on the 2015 joint tax return.	<ul style="list-style-type: none"> • Tax Return Transcript for couple who filed jointly • W-2 for person whose information is being used to determine financial aid eligibility and who has since remarried. • Tax Return Transcript for new spouse
The parent or student was not married in 2015 but is married at the time the FAFSA is filed.	<ul style="list-style-type: none"> • The current spouse's income must be reported on the FAFSA. • Tax Return Transcripts for both spouses.
The parents or the student is married but filed tax returns separately.	<ul style="list-style-type: none"> • Tax Return Transcripts for both spouses
An amended tax return was filed.	<ul style="list-style-type: none"> • A transcript from the IRS that lists tax account information of the tax filer and • Signed copy of the amended return (1040X)
Foreign tax return	<ul style="list-style-type: none"> • Signed and notarized copy of the Foreign Tax Return translated into English
Tax filer does not have a valid social security number.	<ul style="list-style-type: none"> • Tax Return Transcript
Extension has been filed.	<ul style="list-style-type: none"> • Copy of extension Form 4868 submitted to IRS • W-2 or if self-employed: signed statement certifying AGI and taxes paid
Money is owed to the IRS, unless the balance was paid in full.	<ul style="list-style-type: none"> • Neither the IRS Data Retrieval nor a Tax Return Transcript will be available until mid-June.
Identity Theft	<ul style="list-style-type: none"> • A tax filer who is unable to obtain an IRS Tax Return Transcript because of IRS identity theft, calls a special IRS group at 1-800-908-4490 • Upon verification of identity, the tax filer can obtain a paper copy of the Tax Return Data Base View (TRDBV). The TRDBV is an official transcript that can be submitted to the school to meet verification requirement • A signed and dated statement from the tax filers that they are victims of IRS tax-related identity theft and that the IRS has been made aware of this