



# 2017-2018 Student Income Information Verification Worksheet

Your 2017–2018 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. To verify that you provided correct information Colby Community College (CCC) will compare your FAFSA with the information on this worksheet. By law, we have the right to ask you for this information before awarding federal aid. If there are any discrepancies, CCC may request further clarification and/or documentation. If corrections are needed, CCC will make them on your behalf. **Once you submit the requested documents, please do not make any corrections to your FAFSA unless you are instructed to do so by CCC.** You must complete and sign this worksheet, attach any required documents, and submit the form and other required documentation as soon as possible.

## A. Student's Information

Last Name	First Name	M.I.
SSN / Student ID number	Date of Birth	

## B. Student Income Information to Be Verified

**Check one box only**

**1. TAX RETURN FILERS: Important Note:** If you or your spouse filed, or will file, an amended 2015 IRS tax return or are filing an extension for 2015, see page 2 of this form for further information

Myself /Spouse filed taxes in 2015

- Must provide a copy of your/your spouse's 2015 IRS Tax Return Transcript – see page 2 for further information
  - If married and filed separate 2015 returns - provide a copy of each IRS tax transcript
- Or make corrections to your FAFSA to import the IRS information – see page 2 for further information

**2. TAX RETURN NONFILERS:** Complete this section if you or your spouse did not file and are **not required** to file, a 2015 income tax return with the IRS. You must order a return tax transcript from [www.irs.gov](http://www.irs.gov) stating you did not file.

I or my spouse **did not** work in 2015, so I/we did not file and are not required to file a 2015 income tax return.

Mark the item below which represents your non-filer category:

If you are...	AND at the end of 2015 you were....	Did not earn at least....
<input type="checkbox"/> Single	under 65	\$10,015,000
<input type="checkbox"/> Single	65 or older	\$11,700.00
<input type="checkbox"/> Married Filing Jointly	under 65 (both spouses)	\$20,300.00
<input type="checkbox"/> Married Filing Jointly	65 or older (one spouse)	\$21,500.00
<input type="checkbox"/> Married Filing Jointly	65 or older (both spouses)	\$22,700.00
<input type="checkbox"/> Married Filing Separately	any age	\$3,950.00
<input type="checkbox"/> Head of Household	Under 65	\$13,050.00
<input type="checkbox"/> Head of Household	65 or older	\$14,600.00
<input type="checkbox"/> Qualifying widow(er) with dependent child	under 65	\$16,350.00
<input type="checkbox"/> Qualifying widow(er) with dependent child	65 or older	\$17,550.00

Myself/Spouse **did** work in 2015, but they did not file and are not required to file a 2015 income tax return. List all of your/your spouse's employers and the amount earned from each, even if they did not receive a W-2. **\*You must submit copies of your 2015 W-2s and complete the boxes below.**

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

**Note:** We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

Student \_\_\_\_\_ Date \_\_\_\_\_

*Do not mail this worksheet to the U.S. Department of Education.*

## Follow These Steps to Utilize the IRS DRT to Transfer IRS Tax Data into the FAFSA

1. Click **Login** at fafsa.ed.gov.
2. Enter student's name, Social Security Number, and date of birth. Click **Next**.
3. Click **Make FAFSA Corrections** if the FAFSA has previously been submitted.
4. Enter student's Federal PIN and password created when FAFSA was filed.
5. Click on **Financial Information** (located in the top menu navigation bar).
  - For students who provide parent financial information on the FAFSA, the **Parent Tax Information** is displayed.
6. Select **Already Completed** if the parent 2015 IRS income tax return has already been completed and submitted.
7. Select the correct answer for each of the questions.
  - If **No** is selected for all questions, enter the parent federal PIN and click **LINK TO IRS**.
8. Click **OK** to leave FAFSA on the Web.
9. Click **OK** to enter the IRS system.
10. Once on the IRS website, enter the requested information.
11. Click **Submit** when requested information has been entered *exactly* how it appears on the IRS income tax return.
  - If the IRS is able to validate your identification, the IRS tax information displays.
  - If any part of the street address on the 2015 IRS Income Tax Return is abbreviated, please eliminate all punctuation and be sure that the street address on the FAFSA is exactly the same as the 2015 IRS Income Tax Return.  
*Example:* If the street address on the 2015 IRS Income Tax Return is *104 E. Main St.*, it should be entered as *104 E Main St* on the FAFSA. 2015 IRS Income Tax Returns that are filed using only a PO Box should be entered on the street address line.
12. Select the **Transfer My Tax Information into the FAFSA** and click **Transfer Now**.
  - **DO NOT change any information.**
13. Return to the FAFSA website using the links provided.
14. If the student has already completed a submitted a 2015 IRS Income Tax Return, proceed to the Student Financial Information section under **Financial Information** (located in the top menu navigation bar).
  - Repeat steps 3-13 to retrieve the student tax information.
15. Click on **Sign & Submit** in the top menu navigation bar after the student tax information is transferred into the FAFSA.
16. Proceed with signing and submitting the FAFSA.
17. Click on **SUBMIT MY FAFSA NOW**. A confirmation number displays to verify submission.

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### **A 2015 IRS Tax Return Transcript may be obtained through:**

- Get Transcript by MAIL – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- Get Transcript ONLINE – Go to [www.irs.gov](http://www.irs.gov), under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6–8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

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### **Other**

#### **Individuals Granted a Filing Extension by the IRS**

If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for the tax year 2015;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2015; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2015 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 tax year 2015.

#### **Individuals Who Filed an Amended IRS Income Tax Return**

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A signed copy of the original 2015 IRS income tax return that was filed with the IRS or a **2015 IRS Tax Return Transcript**; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

#### **Individuals Who Were Victims of IRS Identify Theft**

A victim of IRS identity theft who is not able to obtain a **2015 IRS Tax Return Transcript** or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2015 IRS income tax return information.