

Student's Name: _____ Buff ID # _____

B. Student's Income Information to Be Verified

1. **Student Tax Filers**-Complete this section if you and/or your spouse filed or will file a 2016 tax return.

- In order to complete verification of 2016 income information, WTAMU Financial Aid **requires** either the IRS Data Retrieval Tool **or** a 2016 IRS Tax Return Transcript. **Check the circle that applies:**

- The student has used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the WTAMU Financial Aid with a **2016 IRS Tax Return Transcript(s)**.

** Instructions of how to obtain a Tax Transcript are located on the last page of this worksheet*

___ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.
 ___ Check here if a **2016 IRS Tax Return Transcript(s)** will be provided later.

- ❖ In order to verify your and/or spouse's income earned from work please include in the box below all W2 income, self employment income, farm income, rental property income, and/or partnership income.

Employer's Name	2016 Amount Earned	IRS W2 Income?	Self-Employment Income?	Farm Income?	Rental Prop or Partnership Income?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$1500.00(example)</i>		<i>Yes(example)</i>		

- ❖ *For income earned from work additional documents must be turned in to verify the amounts.*
 - W2 for IRS W2 income
 - Schedule C for Self-Employment income
 - Schedule F for Farm income
 - Value of Rental Property minus debt on property for rental property income
 - K-1 for Partnership Income

2. **Student Nontax Filers**-Complete this section if you and/or spouse will not file and are not required to file a 2016 income tax return with the IRS. **Check the circle that applies:**

- The student and/or spouse were not employed and had no income earned from work in 2016.
 - **If no income earned from work additional documentation may be required**
- The student and/or spouse were employed in 2016 and have listed above the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided [Provide copies of all 2016 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

- **FOR INDEPENDENT STUDENTS ONLY:** Provide documentation from the IRS dated on or after October 1, 2017 that indicates a 2016 income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of non-filing is provided.
 ___ Check here if confirmation of non-filing will be provided later.

** Instructions of how to obtain a Non-Filing Tax Transcript are located on the last page of this worksheet*

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C. Dependent Student Parent's Income Information to Be Verified (each parent included in the household).

3. **Parent Tax Filers**-Complete this section if your parent/parents filed, or will file, a 2016 tax return

- In order to complete verification of 2016 income information, WTAMU Financial Aid **requires** either the IRS Data Retrieval Tool **or** a 2016 IRS Tax Return Transcript. **Check the circle that applies:**

- The parents have used the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student's FAFSA.
- The parents have not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA.
- The parents are unable or choose not to use the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead will provide WTAMU Financial Aid with a **2016 IRS Tax Return Transcript(s)**.

* *Instructions of how to obtain a Tax Transcript are located on the last page of this worksheet*

- ___ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.
- ___ Check here if a **2016 IRS Tax Return Transcript(s)** will be provided later.

- ❖ In order to verify your parent's income earned from work please include in the box below all W2 income, self employment income, farm income, rental property income, and/or partnership income.

Employer's Name	2016 Amount Earned	IRS W2 Income?	Self-Employment Income?	Farm Income?	Rental Prop or Partnership Income?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$1500.00(example)</i>		<i>Yes(example)</i>		

- ❖ *For income earned from work additional documents must be turned in to verify the amounts.*

- W2 for IRS W2 income
- Schedule C for Self-Employment income
- Schedule F for Farm income
- Value of Rental Property minus debt on property for rental property income
- K-1 for Partnership Income

4. **Parent Nontax Filers**-Complete this section if the parents will not file and are not required to file a 2016 income tax return with the IRS. **Check the circle that applies:**

- Neither parent was employed, nor neither had income earned from work in 2016.
 - If no income earned from work additional documentation may be required**
- One or both parents were employed in 2016 and have listed above names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

- Provide documentation from the IRS dated on or after October 1, 2017 that indicates that a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

- ___ Check here if confirmation of non-filing is provided
- ___ Check here if confirmation of non-filing will be provided later.

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Basic steps for using the IRS Data Retrieval Tool

- ❖ www.fafsa.gov
 - Log in to your 18/19 FAFSA record
 - Make FAFSA corrections
 - Navigate to financial information section and follow instructions to determine if you are eligible to use the IRS Data Retrieval Tool.
 - If eligible, transfer 2016 IRS income tax information into your FAFSA

A **2016 IRS Tax Return Transcript** may be obtained through:

- ❖ Get Transcript by MAIL – Go to 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 by ONLINE – Go to 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

A **2016 IRS Non-Filing Tax Transcript** may be obtained through:

- ❖ Get Transcript by Mail - Download form 4506-T from www.irs.gov, mail or fax the completed form to the appropriate address (or fax number) at the IRS. **Make sure to check box 7 for ‘Verification of Non-filing’** After the IRS receives and processes the signed request the Non-Filing letter will be mailed within 5 to 10 business days.
- ❖ Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click “Get a tax transcript.” Click “Get Transcript ONLINE.” After logging in select the appropriate 2016 tax year and select form *Verification of Non-Filing*.

When you receive the IRS tax return transcript, please submit it to WTAMU Financial Aid with your Buff ID number included on each page of the report.

D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student (if student is dependent) and one parent whose information is reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student's Signature

Date

Print Student's Name

Student Buff ID #

Parent's Signature

Date

**Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to WTAMU Financial Aid.
You should make a copy of this worksheet for your records.**