



**\*\*PLEASE NOTE:** In addition to this worksheet, 2013 U.S. Income Tax Return information **MUST** be provided to the Financial Aid Office. The best way to do this is by using the IRS Data Retrieval Tool directly through the FAFSA. Alternatively you may request a Tax Return Transcript through the IRS webpage: <http://www.irs.gov/Individuals/Order-a-Transcript>. Make sure to order the **Tax Return Transcript**, not the IRS Tax Account Transcript. You may also call the IRS directly at 1-800-908-9946.

**C. DEPENDENT STUDENT’S INCOME INFORMATION TO BE VERIFIED**

**TAX RETURN FILERS - Instructions:** Complete this section if you, the student, filed or will file a 2013 income tax return with the IRS. *The best way to verify income and EXPEDITE the Verification Process, is by using **the IRS Data Retrieval Tool** that is part of FAFSA on the Web. If you have not already used the tool, go to [FAFSA.gov](http://FAFSA.gov), log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form.*

**Check the box that applies:**

- I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2013 IRS income information.
- I, the student, have not yet used the IRS Data Retrieval Tool, but will by \_\_\_\_\_ (date)
- I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school **2013 IRS TAX RETURN TRANSCRIPT(S)**. *To obtain an IRS tax return transcript, go to [www.IRS.gov](http://www.IRS.gov) and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure to request the **“IRS tax return transcript”** and not the “IRS tax account transcript”.*

**TAX RETURN NONFILERS**—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2013 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2013.
- The student was employed in 2013. List the names of all employers and amount earned from each employer. **Must attach copies of all 2013 W-2 forms** issued to you employers.

Employer’s Name	2013 Amount Earned	IRS W-2 Attached?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

**D. PARENT’S INCOME INFORMATION TO BE VERIFIED**

**TAX RETURN FILERS—Important Note:** If the student’s parent(s), filed or will file, an amended 2013 IRS tax return the student’s financial aid administrator must be contacted before completing this section.

**Instructions:** Complete this section if the student’s parent(s) filed or will file a 2013 income tax return with the IRS. *The best way to verify income is by using the **IRS Data Retrieval Tool** that is part of FAFSA on the Web. If the student’s parent(s) has not already used the tool, the parent and the student should go to [FAFSA.gov](http://FAFSA.gov), log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. **Please Note** - It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

**Check the box that applies:**

- The student’s parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2013 IRS income information

The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2013 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool.*

The parent(s) is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2013 IRS tax return transcript(s)—not photocopies of the income tax return.** *To obtain an IRS tax return transcript go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "**IRS tax return transcript**" and not the "IRS tax account transcript."*

**TAX RETURN NONFILERS** — Complete this section if the student's parent(s) will not file and is not required to file a 2013 income tax return with the IRS. **Check the box that applies:**

The parent(s) was not employed and had no income earned from work in 2013.

The parent(s) was employed in 2013 and has listed below the names of all the parent's employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is attached. Attach copies of all 2013W-2(s) forms issued.

Employer's Name	2013 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>

**E. Parent's Other Information to Be Verified**

Complete this section if someone in the student's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2013 calendar year.

     **YES**... Attach documentation for the benefit during the calendar year 2013.      **NO**... Continue to next STEP

**F. Complete this section if one of the student's parents paid child support in 2013.**

Indicate below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support paid.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

**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 must sign and date.

**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

\_\_\_\_\_ 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.***

## 2014-15 FAFSA & IRS DATA RETRIEVAL PROCESS

When completing the FAFSA you will be prompted to enter your PIN and link to the IRS web site. The retrieval process will display your tax information and allow you to transfer it to your FAFSA. Our office **ENCOURAGES EVERYONE** to retrieve their tax data when completing the FAFSA. Families who do not use the IRS Data Retrieval process may be required to submit an **IRS tax transcript directly from the IRS** to complete the federal verification process.

### OPTION 1 – IRS DATA RETRIEVAL

**Please Note:** *You will be unable to select this option if you are married and filed separately, if a parent had a change of marital status after December 21, 2013, the home address on the FAFSA does not match the address on the tax return, or if anyone filed an amended or foreign tax return.*

The IRS Data Retrieval Tool allows students and parents to electronically transfer their tax information to their FAFSA directly from the IRS. If a student or a parent has already submitted their FAFSA without using the IRS Data Retrieval Tool, **they can go back and make a correction to their FAFSA and use this tool.**

1. Log into your FAFSA at <http://www.fafsa.ed.gov>
2. Click on “Make FAFSA Corrections” and enter your PIN and create a password.
3. Click on Financial Information
4. Under Parent Financial Information, confirm that the filing status (first question) says “Already Completed.” Then proceed to “**LINK TO IRS**” button.
5. Follow the instructions on the IRS Data Retrieval Tool.

**Don’t forget to “SIGN & SUBMIT” your corrections..**

The Federal Tax Return must be filed at least two weeks (if filing electronically) and 6 -8 weeks (if filing paper return) before using the FAFSA IRS Data Retrieval Process to allow the IRS time to process the return.

### OPTION 2 – Obtain and submit a Free Tax Return Transcript from the IRS

If your FAFSA is selected for verification, and you did not use the IRS Data Retrieval option or you changed the IRS data, you will be required to request a tax transcript from IRS. Personal copies of tax returns can no longer be accepted.

There are three ways to request your Tax Transcript: by online, by phone, or by mail. **Please make sure you request a Tax Return Transcript. DO NOT request a Tax Account Transcript or Record of Account** because they cannot be used for financial aid verification purposes.

1. Go to [www.irs.gov](http://www.irs.gov), Click **Get Transcript of your tax records**, and then click **Get Transcript online** (*Please note: you must first create an account. A Confirmation code will be emailed to you which you will need to obtain a Tax Return Transcript*).
2. Call the IRS at 1-800-829-1040.
3. Order by mail: Complete Form 4506-T (Request for Transcript of Tax Return- available online at <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.)