

**2018-2019 Independent Verification Worksheet**  
**STUDENT TAX TRANSCRIPT REQUEST**

**WHY YOU HAVE RECEIVED THIS FORM**

Your application was selected for review in a process called “verification”. In this verification process, we will be comparing information from your FAFSA with copies of your 2016 federal tax return transcripts, with W-2 forms or other financial documents. Federal regulations require us to collect this information before disbursing federal aid. If there are differences between your FAFSA and the verification documents, we will make the corrections and send the required changes electronically to the federal student aid processor to have your information reprocessed.

**Student Information**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_  
 Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Student ID: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Home Phone: (\_\_\_\_) \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

**Student’s Income Information to Be Verified**

**THIS IS NOT A TAX RETURN TRANSCRIPT. Instructions are listed on back of this form for the Data Retrieval Tool and/or requesting a Tax Return Transcript from the IRS.**

**TAX RETURN FILERS**— complete this section if you and/or your spouse, filed or will file a 2016 income tax return with the IRS.

**Student:** Check the box that applies.

- I filed 2016 taxes and **have used the IRS Data Retrieval Tool** in the FAFSA on the Web to retrieve and transfer 2016 IRS income information into the FAFSA
- I filed 2016 taxes and **attached the 2016 IRS tax return transcripts** to this worksheet.

**Spouse:** Check the box that applies.

- My spouse filed 2016 taxes and has **used the IRS Data Retrieval Tool** in the FAFSA on the Web to retrieve and transfer 2016 IRS income information into the FAFSA.
- My spouse filed 2016 taxes and **attached the 2016 IRS tax return transcripts** to this worksheet.

**NONFILERS ONLY**— **complete this section only** if student and/or spouse (if applicable) **WILL NOT FILE** and is not required to file a 2016 income tax return with the IRS.

**Instructions are listed on the back of this form for requesting a Non- tax filer Transcript from the IRS.**

**Check the box that applies:**

- The student was **NOT** employed and had no income earned from work in 2016 and have **attached the 2016 IRS Non-filer Tax Return Transcripts** to this worksheet.
- The student was employed in 2016 and has listed below the names of all the student’s employers. Attach copies of all 2016 IRS W-2 forms issued to the student by employers.
- The spouse was **NOT** employed and had no income earned from work in 2016 and have **attached the 2016 IRS Non-filer Tax Return Transcripts** to this worksheet.
- The spouse was employed in 2016 and has listed below the names of all the spouse’s employers. Attach copies of all 2016 IRS W-2 forms issued to the spouse by employers.

Employer’s Name	2016 Amount Earned	IRS W-2 or Equivalent Document Attached?
Suzy’s Auto Body Shop (Example)	\$2,000(example)	Yes (example)

Employer’s Name	2016 Amount Earned	IRS W-2 or Equivalent Document Attached?
Suzy’s Auto Body Shop (Example)	\$2,000(example)	Yes (example)

*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 Social Security Number at the top.*

(over)

**Return this form and any attachments to the above address.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature


\_\_\_\_\_  
Date

**How to Use the Data Retrieval Tool (DRT) to retrieve and transfer your 2016 IRS income information into the FAFSA.**

(It must be two (2) weeks after electronically filing your taxes or 6-8 week after mailing your taxes)

- Log into your current FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
- Select **Make FAFSA Correction** (in small blue print, located at the bottom of the My FAFSA Welcome box).
- Click on the **Financial Information Tab** at the top. You must indicate that you have **already completed** a Federal Tax Return and answer “NO” to the following question(s):

➤ **Did you file a Puerto Rican or foreign tax return for 2016?**  
 Yes  No



Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

[LINK TO IRS](#)

(If you filed your taxes as Married Filing Separate request your Federal tax transcript from the IRS at 1-800-908-9946 or online at [www.irs.gov](http://www.irs.gov))

- Click “**Link to IRS**”
- A few pop-ups will appear, read and select “Proceed to IRS Site”. Once on the IRS website, click “OK” to access the IRS form to retrieve your tax information.
- Provide your *filing status and address at it appears on your Federal tax return.*
- Select the **Transfer** box and then select the **Transfer Now** button.
- The amounts will not display on your FAFSA. For your protection, the answer to each question is replaced with the “**Transferred from the IRS**”.
- Proceed to the end of the FAFSA: **SIGN** and **SUBMIT** the corrections.

\*In 3-5 Business days you may check your financial aid document status via Self Service by logging on to your OCtech Connect Account

**Requesting a Federal Tax Transcripts if you are ineligible or choose not to use the IRS Data Retrieval Tool (DRT).**

(Do **NOT** send copies of the tax return form: 1040, 1040A, or 1040EZ to the Financial Aid Office. We are no longer allowed to use tax return copies to complete verification. The Federal tax return **MUST** be requested directly from the IRS.)

- Visit the IRS website at [www.irs.gov](http://www.irs.gov) to obtain your 2016 Federal IRS Tax **Return** Transcript.
- Here you will have the option to request the transcript by **mail** (may take up to 5-10 business days before receiving) or **online** by choosing the appropriate, “**Get a Tax Transcript**” link.
- Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript”
- If you are unable to obtain a copy of the Federal tax return transcript by mail or online, please request the Federal tax return transcript by phone: 1-800-908-9946
- Once you receive your Federal tax return transcript, please submit the transcript to the Financial Aid Office with all required signatures and the student’s ID number.

\*Allow 1-2 Business days after submitting the transcript for required documents to be update. You may check your financial aid document status via via Self Service by logging on to your OCtech Connect Account.

**Requesting a Federal Non-tax filer Transcript if “WILL NOT FILE” and are not required to file a 2016 income tax return.**

*Dependent students* who are a non-tax filer are excluded from the verification requirement to provide confirmation of the dependent student’s non-filing status from the IRS

(The IRS Verification of Nonfiling Letter/Transcript **MUST** be dated on or after 10/1/17 for the 2018-2019 award year.)

- Visit the IRS website at [www.irs.gov](http://www.irs.gov) to obtain your 2016 Federal IRS Non-tax filer Transcript.
- Here you must complete and submit IRS Form 4506-T and checking box 7 to obtain a copy of the Federal nonfiler transcript.
- The Federal Non-tax filer Transcript is **NOT** available via IRS Get Transcript by Mail or by phone.
- Once you receive your Federal Non-tax filer transcript, please submit the transcript to the Financial Aid Office with all required signatures and the student’s ID number.

\*Allow 1-2 Business days after submitting the transcript for required documents to be update. You may check your financial aid document status via Self Service by logging on to your OCtech Connect Account.