

**2018-2019 Dependent Verification Worksheet
PARENT 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: _____

Parent'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 the parent and/or step -parent, filed or will file a 2016 income tax return with the IRS.

Parent 1: Check only one box below.

- 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 student's FAFSA
- I filed 2016 taxes and am *unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web*, and instead have **attached the 2016 IRS tax return transcripts** to this worksheet.

Parent 2: Check only one box below.

- 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 student's FAFSA
- I filed 2016 taxes and am *unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web*, and instead have **attached the 2016 IRS tax return transcripts** to this worksheet.

TAX RETURN NONFILERS—complete this section if either parent 1 or parent 2 **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-filer Transcript from the IRS.

Check the box that applies:

- Parent 1 and/or Parent 2 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.
- Parent 1 and/or Parent 2 was employed in 2016 and has listed below the names of all the parent's employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is attached. Attach copies of all 2016 IRS W-2 forms or an equivalent document issued to the parent by employers. *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.*

Parent 1: W-2 Forms Required

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

Parent 2: W-2 Forms Required

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

**IF MORE THAN 3 Employers, CHECK HERE _____ AND CONTINUE ON A SEPARATE SHEET OF PAPER*

Parent Signature

Date

Spouse's Signature

Date

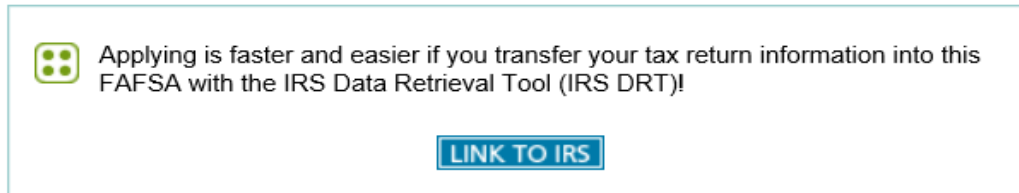
(over)

Return this form and any attachments to the above address.

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
- 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



(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)

- 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 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 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 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.