



PROGRAM OF STUDY	PHONE 1	FAX	EMAIL
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College of Professional Studies	(866) 238-4358	(731) 407-7180	cpsverifications@bethelu.edu
School of University Studies	(731) 352-4024	(731) 241-0010	finaidsus@bethelu.edu
College of Public Service	(731) 352-8406	(731) 393-0392	cjfinaid@bethelu.edu

Student's Last Name: _____

Student's First Name: _____ **MI:** ____

Last 4 digits of Social Security Number: ____ _

Date of Birth: ____ / ____ / ____ **Daytime Phone #:** ____ - ____ - ____

Email: _____ @ _____

2013-2014 INCOME VERIFICATION

Tax Information Needed – For Student (and Spouse if married): The instructions below apply to the student and spouse, if the student is married. If the student is married and they and their spouse filed separate IRS income tax returns for 2012 both must provide a tax return transcript.

For Parent (s) of Dependent Students only: If the parents are married and filed separate IRS income tax returns for 2012 both must provide a tax return transcript.

Instructions: Complete this section if the student, spouse or parent(s) filed or will file a 2012 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2012 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

In most cases, for electronic filers, a **2012 IRS Tax Return Transcript** may be requested from the IRS within 2–3 weeks after the 2012 IRS income tax return has been accepted by the IRS. Generally, for filers of 2012 paper IRS income tax returns, the **2012 IRS Tax Return Transcript** may be requested within 8–11 weeks after the 2012 paper IRS income tax return has been received by the IRS.

Check the box that applies:

<input type="checkbox"/> The student <u>has used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2012 IRS income tax return information into the student's FAFSA.	<input type="checkbox"/> The parents <u>have used</u> the IRS DRT in <i>FAFSA on the Web</i> to transfer 2012 IRS income tax return information into the student's FAFSA.
<input type="checkbox"/> The student is <u>unable or chooses not to use</u> the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school a 2012 IRS Tax Return Transcript(s) . (signature not required)	<input type="checkbox"/> The parents are <u>unable or choose not to use</u> the IRS DRT in <i>FAFSA on the Web</i> , and instead will provide the school a 2012 IRS Tax Return Transcript(s) . (signature not required)

To obtain a 2012 IRS Tax Return Transcript, see APPENDIX A For individuals with Unusual Circumstances see APPENDIX B

CERTIFICATION: ALL STUDENTS MUST COMPLETE THE CERTIFICATION BELOW

I give Bethel University permission to make any electronic corrections to my FAFSA as needed, resulting from the verification process.

Student's Signature

Date

Parent's Signature (only required if student is dependent)

Date

APPENDIX A - How to Access a Copy of Your Tax Return Transcript

Due to regulations submitted by the Department of Education for the 2013-2014 Financial Aid Year the Financial Aid office can no longer accept copies of the 1040 tax return form to verify income. A copy of a tax return transcript provided to you from the IRS is the only form that we can accept. If you are married but filed separate returns we will need a copy of your and your spouse's tax return transcript.

This form can be obtained from the IRS in three different ways listed below. Some are faster than others.

1. Go to the IRS Website and request online:

- a. Here is the link to the IRS Transcript request page. <http://www.irs.gov/individuals/article/0,,id=232168,00.html>
- b. You must use the name of the first person listed on the tax return. If your spouse is listed first on a joint return you must use their Social Security Number and Date of Birth
- c. Processing and receipt time can vary due to peak times. The USPS delivery rate will be slower due to downsizing and closing of several mail processing centers.
- d. If you have moved after you file your taxes you cannot request a transcript online. If you need transcripts mailed to an address other than the one on file you will need to complete and send [Form 4506-T](#) or [Form 4506-T-EZ](#)

- a. Call 1-800-908-9946
- b. You must use the name of the first person listed on the tax return. If your spouse is listed first on a joint return you must use their Social Security Number and Date of Birth
- c. Processing and receipt time can vary due to peak times. USPS delivery rate is going to be slowed down due to downsizing and closing of several sorting and processing centers across the United States which will affect delivery.
- d. If you have moved after you file your taxes you cannot request a transcript online. If you need transcripts mailed to an address other than the one on file you will need to complete and send [Form 4506-T](#) or [Form 4506-T-EZ](#)

2. Call the automated telephone number:

3. Visit a Taxpayer Assistance Center at a location near you.

- a. Here is a link to the IRS that provides locations of local field offices Taxpayer Assistance Center: <http://www.irs.gov/app/officeLocator/index.jsp>

b. INSTRUCTIONS:

i. Type in your zip code and chose a mile radius:

Taxpayer Assistance Center Office Locator

Locate the closest Taxpayer Assistance Center by entering your 5 digit zip code.
You can widen your search by using the pulldown for distance in miles.

Zip Code ← Search within a Mile Radius.

ii. Click on hours of operation link:

Walk-In Site	Jackson	
Address	109 S. Highland	Map - 38301 - location
City	Jackson, TN 38301	
Phone	(731) 423-2441	
Hours of Operation	Jackson hours ←	
Distance	Approximately 39 Miles	

iii. Scroll down the page until you see a list of the offices:

City	Street Address	Days/Hours of Service
Chattanooga	5740 Uptain Rd. Chattanooga, TN 37411	Monday-Friday - 8:30 a.m.-4:30 p.m. Services Provided
Jackson	109 S. Highland Jackson, TN 38301	Monday- Friday - 8:30 a.m.-4:30 p.m. Services Provided ←

- iv. **Note:** Before visiting the local office click on “Services Provided” in the chart (see example above) to see what services are available. Services may vary from site to site. You can get these services on a walk-in, non-advance appointment basis.

v. Make sure that they are showing the following service:

- Copies of Tax Returns & Transcripts (*Usually available for current year and three prior years*)

- c. You must show up in person as they do not answer phone calls from any of their locations.

APPENDIX B - Information for Individuals with Unusual Circumstances

Verification of 2012 IRS Income Tax Return Information for Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2012 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2012; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2012 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2012.

Verification of 2012 IRS Income Tax Return Information for Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2012, provide both of the following:

- A signed copy of the original 2012 IRS income tax return that was filed with the IRS or a **2012 IRS Tax Return Transcript** (signature not required) for the 2012 tax year; and
- A signed copy of the 2012 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Verification of 2012 IRS Income Tax Return Information for Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a **2012 IRS Tax Return Transcript** or use the IRS DRT must provide a signed copy of the 2012 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following:

- A statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or
- A copy of a police report if it was filed related to the IRS identify theft.

Verification of 2012 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

If an individual filed or will file a 2012 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2012 income tax return(s).

If the student or parent believes that the amount on their Federal Tax return does not represent their current income they may request a Professional Judgment. Contact the Financial Aid Office for additional information.