

Your Free Application for Federal Student Aid (FAFSA) has been selected for a process called "Verification". In this process, the Financial Aid Office will be comparing the information on your FAFSA application with tax forms and other financial documents. Federal law states that we have the right to ask for this information before awarding Federal Aid. You must complete this form and provide copies of all requested paperwork within 2 weeks of receipt. Incomplete paperwork will be returned to you for completion which will delay the processing of your financial aid award.

A. Student Information

_____ Last Name	_____ First Name	_____ M.I.	_____ Social Security Number
_____ Address (include apt. no.)			_____ Date of Birth
_____ City	_____ State	_____ Zip Code	_____ Phone number (include area code)

B. Family Information

List the people in your household, including:

1. Yourself
2. Your spouse, if you are married
3. Your children, if any, if you will provide more than 50% of their support from July 1, 2013 through June 30, 2014 OR any children that would be required to provide your information when applying for Federal Student Aid
4. Other people that live with you now and you will provide more than 50% of their support and will continue to provide more than half their support from July 1, 2013 through June 30, 2014.

Write all names and ages of all household members in the spaces below. Also write in the name of the college for any household member who will be attending at least half-time between July 1, 2013 and June 30, 2014, and will be enrolled in a degree, diploma or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Missy Jones (example)	18	Daughter	Central University
		Self	

C. SNAP Benefits

Did you or a member of your household receive benefits from the Supplemental Nutrition Assistance Program (SNAP)(formerly known as Food Stamps) sometime during 2011 or 2012? *Note: SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433-3243). If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued the SNAP benefits in 2011 or 2012.*

- ☐ Yes.
- ☐ No.

D. Income Information Verification

Instructions: The preferred way to verify income for tax filers is by using the IRS Data Retrieval Tool that is a part of the FAFSA on the web. If the tool has not already been used, go to www.fafsa.gov, log into your FAFSA record, select "Make FAFSA Corrections," and navigate to the *Financial Information* tab. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2012 IRS tax income information into your FAFSA. If you are unable to utilize the IRS Data Retrieval Tool, an IRS Tax Return Transcript will need to be submitted for the student (and/or spouse). Please be aware, an IRS Tax Return Transcript is *not* the same as a copy of a federal tax return and *must* be requested from the IRS. Additional instructions for requesting an IRS Tax Return Transcript are below in the boxes or on the last page of this document.

STUDENT Tax Section

(check only one box)

<input type="checkbox"/>	Check here if you filed 2012 federal tax return <i>and</i> utilized the IRS Data Retrieval Tool on the FAFSA.
<input type="checkbox"/>	Check here if you filed a 2012 federal tax return and did NOT utilize the IRS Data Retrieval Tool. <i>You must attach a copy of the <u>IRS Tax Return Transcript</u>. To obtain, call the IRS at 1-800-908-9946. Follow the prompts and then select "Option 2" to request an IRS Tax Return Transcript and then enter "2012".</i>
<input type="checkbox"/>	Check here if you will not and are not required to file a 2012 federal tax return. <i>You must attach a copy of all applicable 2012 W-2's as proof of any income received.</i>

If married and did NOT file jointly

Spouse Tax Section

(check only one box)

<input type="checkbox"/>	Check here if you filed 2012 federal tax return <i>and</i> utilized the IRS Data Retrieval Tool on the FAFSA.
<input type="checkbox"/>	Check here if you filed a 2012 federal tax return and did NOT utilize the IRS Data Retrieval Tool. <i>You must attach a copy of the <u>IRS Tax Return Transcript</u>. To obtain, call the IRS at 1-800-908-9946. Follow the prompts and then select "Option 2" to request an IRS Tax Return Transcript and then enter "2012".</i>
<input type="checkbox"/>	Check here if you will not and are not required to file a 2012 federal tax return. <i>You must attach a copy of all applicable 2012 W-2's as proof of any income received.</i>

E. Child Support Paid Verification

Complete the chart below if you or your spouse (if applicable) paid any child support in 2012. If you need more space, attach a separate page.

Name of Payer	Paid to: (Payee)	Paid for: (child's name)	Total Amount Paid in 2012	Signature of Payer

F. Sign this Worksheet

Each person signing this form certifies that all the information reported on it is complete and correct. The student must sign and date. If married, the spouse's signature is optional.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail or both.

Student

Date

Spouse

Date

IRS Tax Return Transcript Request Process

The preferred method for supplying tax data on the FAFSA is to make a correction to the FAFSA and use the IRS Data Retrieval Tool to transfer the data directly from the IRS into the FAFSA. By doing this, we will receive the correction within a week of the submitted correction. Provided the transferred data was not changed, we would not require the tax transcripts which can take up to 10 days for you to receive from the IRS and additionally the mail time to submit them to the Financial Aid Office.

Tax filers can request a Federal Tax Return Transcript, free of charge, from the IRS in one of three ways. The telephone method is the preferred method.

1. Telephone Request

- Call the IRS at 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. *(Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.)*
- Select “**Option 2**” to request an IRS Tax Return Transcript and then enter “**2012**”.

If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request. *IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.*

2. Online Request

- Go to www.irs.gov
- On the homepage, under the ‘Tools’ section (middle of page), click on ‘Order a Tax Return or Account Transcript’
- Click on ‘Order a Transcript’ (under #3)
- Enter the tax filer’s Social Security Number, date of birth, street address and zip code. *(You must use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.)*
- Click ‘Continue’
- In the **Type of Transcript** field, select “Return Transcript” and in the **Tax Year** field, select “2012”.

If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS. *IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.*

3. Paper Request Form – IRS Form 4506T-EZ—*(IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.)*

- Download the form at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Please do **NOT** have the IRS Tax Return Transcript mailed directly to Lakeland College as we may have difficulty matching a parent’s incoming IRS Tax Return Transcript to a student’s file, as the two names may be different.
- On line 6, enter “**2012**” to receive IRS tax information for the 2012 tax year that is required for the 2013-2014 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.

Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request.

NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.