

Student's Name: _____ SSN: _____

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2014 or had a change in marital status after December 31, 2014.

Instructions: Complete this section if the student and spouse filed or will file a 2014 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 the FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2014 income information that was transferred into the student's FAFSA using the IRS DRT if that information has not changed.

Check the box that applies:

- The student **has used** IRS DRT in *FAFSA on the Web* to transfer 2014 IRS income tax return information into the student's FAFSA.
- The student **has not yet used** the IRS DRT in *FAFS on the Web*, but will use the tool to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.
- The student is **unable or chooses not to use** the IRS DRT in *FAFS on the Web*, and instead will provide the school a **2014 Tax Return Transcript(s)**.

A **2014 IRS Tax Return Transcript** may be obtained through the:

- **Online Request** – Go to www.irs.gov, under the Tools heading on the IRS homepage, click “Get Transcript of Your Tax Records”. Click “Get Transcript ONLINE” or “Get Transcript by MAIL”. Make sure to request the “IRS Tax Return Transcript” and **not** the “IRS Tax Account Transcript”.
- **IRS2Go App** - Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- **Telephone Request** – 1-800-908-9946
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for files of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8-11 weeks after the 2014 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the student and spouse filed separate 2014 IRS income tax returns, **2014 IRS Tax Return Transcripts** must be provided for each.

- Check here if a **2014 IRS Tax Return(s)** is provided.
- Check here if a **2014 IRS Tax Return(s)** will be provided later. *Verification cannot be completed until the IRS Tax Return Transcript(s) has been submitted.*

Student's Name: _____ SSN: _____

C. Dependent Student's Income Information to Be Verified (continued)

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is not required to file a 2014 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2014.
- The student was employed in 2014 and has listed below the names of all the student's employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is attached. Attach copies of all 2014 IRS W-2 forms issued to the student 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.*

Employer's Name	2014 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.

3. UNTAXED INCOME/BENEFITS—Sources may include social security benefits, TANF, GAIN, CalWORKS, child support received, state disability, military housing allowance, general relief, alimony, or any other untaxed income received in 2014.

Check the box that applies:

- The student did not receive any type of Untaxed Income/Benefits during 2014.
- The student did receive Untaxed Income/Benefits during 2014 and has listed below all sources and amounts.

Source of Untaxed Income/Benefit	2014 Amount Received

Student's Name: _____ SSN: _____

D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—**Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents file separate IRS income tax returns for 2014 or had a change in marital status after December 31, 2014.

Instructions: Complete this section if the parents filed or will file a 2014 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 the FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2014 income information that was transferred into the student's FAFSA using the IRS DRT if that information has not changed.

Check the box that applies:

- The parents **have used** IRS DRT in *FAFSA on the Web* to transfer 2014 IRS income tax return information into the student's FAFSA.
- The parents **have not yet used** the IRS DRT in *FAFS on the Web*, but will use the tool to transfer 2014 IRS income tax return information into the student's FAFSA once the 2014 IRS income tax return has been filed.
- The parents are **unable or choose not to use** the IRS DRT in *FAFS on the Web*, and instead will provide the school a **2014 Tax Return Transcript(s)**.

A **2014 IRS Tax Return Transcript** may be obtained through the:

- **Online Request** – Go to www.irs.gov, under the Tools heading on the IRS homepage, click “Get Transcript of Your Tax Records”. Click “Get Transcript ONLINE” or “Get Transcript by MAIL”. Make sure to request the “IRS Tax Return Transcript” and **not** the “IRS Tax Account Transcript”.
- **IRS2Go App** - Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- **Telephone Request** – 1-800-908-9946
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2-3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for files of 2014 paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8-11 weeks after the 2014 paper IRS income tax return has been received by the IRS. Contact the financial aid office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

If the parents filed separate 2014 IRS income tax returns, **2014 IRS Tax Return Transcripts** must be provided for each.

- Check here if a **2014 IRS Tax Return(s)** is provided.
- Check here if a **2014 IRS Tax Return(s)** will be provided later. *Verification cannot be completed until the IRS Tax Return Transcript(s) has been submitted.*

Student's Name: _____ **SSN:** _____

D. Parent's Income Information to Be Verified (continued) —Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

2. **TAX RETURN NONFILERS**—Complete this section if the student's parent(s) will not file and is not required to file a 2014 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 2014.
- The parent(s) was employed in 2014 and has listed below the names of all the parent's employers, the amount earned from each employer in 2014, and whether an IRS W-2 form is attached. Attach copies of all 2014 IRS W-2 forms issued to the parent(s) by employer(s). *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.*

Employer's Name	2014 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>

Note: We may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS.

3. **UNTAXED INCOME/BENEFITS**—Sources may include social security benefits, TANF, GAIN, CalWORKS, child support received, state disability, military housing allowance, general relief, alimony, or any other untaxed income received in 2014.

Check the box that applies:

- The parent(s) did not receive any type of Untaxed Income/Benefits during 2014.
- The parent(s) did receive Untaxed Income/Benefits during 2014 and has listed below all sources and amounts.

Source of Untaxed Income/Benefit	2014 Amount Received

Student's Name: _____ SSN: _____

E. Parent's Other Information to Be Verified

1. Complete this section if someone in the student's parent'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 2014 calendar year.

One of the persons listed in Section B of this worksheet received SNAP benefits in 2014. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2014.

2. Complete this section if one of the student's parents paid child support in 2014.

One (or both) of the student's parents listed in Section B of this worksheet paid child support in 2014. The parent has indicated 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 that was paid in 2014 for each child. If asked by the school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.*

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 2014
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

Note: If we have reason to believe that the information regarding child support paid is inaccurate, we may require additional documentation, such as:

- A signed statement from the individual receiving the child support certifying the amount of child support received; or
- Copies of the child support payment checks, money order receipts, or similar records of electronic payments having been made.

F. 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.