

**- DEPENDENT STUDENT -  
Tax Filers Income Verification**

STUDENT ID	STUDENT LAST NAME	STUDENT FIRST NAME	PHONE NUMBER (with area code)
PLEASE PRINT IN BLACK INK			

In order for us to continue processing your 2015-2016 financial aid application, we need to verify your 2014 income and wage information. We strongly encourage you to utilize the IRS Data Retrieval functionality on the FAFSA- either in the initial filing of the FAFSA, or by submitting a correction at [www.fafsa.gov](http://www.fafsa.gov). While in most cases no further documentation is needed to verify transferred income information, you could still be asked for additional information or documents to verify income.

**1. Check the appropriate box below regarding your tax filing information: (see instructions on page 2 for obtaining transcripts)**

- |                                                                                                                                         |                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> <b>Successfully used the IRS Data Retrieval function on the FAFSA</b><br>on (date) _____ .                     | <input type="checkbox"/> <b>Filed or will file a 2014 Foreign Tax Return</b><br>⇒ Attach a <b>signed and translated copy</b> of the foreign tax return, showing the 2014 Adjusted Gross Income (AGI) and Tax paid |
| <input type="checkbox"/> <b>Unable to use IRS Data Retrieval function on the FAFSA:</b><br>⇒ Attach your 2014 IRS Tax Return Transcript |                                                                                                                                                                                                                   |

**2. Enter the answers for sources of income/support. Please enter zero ("0") under "Amount" if you did not have the item.**

**STUDENT INFORMATION - Sources of Income/Support for 2014 (DO NOT LEAVE ANY ITEMS BLANK)**

EMPLOYERS	2014 Amount	BENEFITS	OTHER SOURCES	2014 Amount
	\$	<input type="checkbox"/> TANF <input type="checkbox"/> SNAP <input type="checkbox"/> SSB <input type="checkbox"/> SSI <input type="checkbox"/> WIC	<input type="checkbox"/> Unemployment	\$
	\$		<input type="checkbox"/> Workers' Compensation	\$
	\$		<input type="checkbox"/> Disability	\$
<b>K-1:</b>	\$		<input type="checkbox"/> Other:	\$

**I was not employed and had no income earned from work in 2014.** (You need to complete a Student Income Verification for Non-Filers form)

**SPOUSE INFORMATION (if married)- Sources of Support for 2014 (DO NOT LEAVE ANY ITEMS BLANK)**

EMPLOYERS	2014 Amount	BENEFITS	OTHER SOURCES	2014 Amount
	\$	<input type="checkbox"/> TANF <input type="checkbox"/> SNAP <input type="checkbox"/> SSB <input type="checkbox"/> SSI <input type="checkbox"/> WIC	<input type="checkbox"/> Unemployment	\$
	\$		<input type="checkbox"/> Workers' Compensation	\$
	\$		<input type="checkbox"/> Disability	\$
<b>K-1:</b>	\$		<input type="checkbox"/> Other:	\$

**I was not employed and had no income earned from work in 2014.** (You need to complete a Spouse Income Verification for Non-Filers form)

**3. If you have unusually low or no income reported above, please explain how the living expenses were paid in 2014:**

**CERTIFICATION & SIGNATURE(S)**

*By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.*

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

\_\_\_\_\_  
Date

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

Tax Return Transcripts are free of charge from the IRS. Instructions for requesting a transcript are below.

### REQUESTING AN IRS TAX RETURN TRANSCRIPT

#### Get Transcript ONLINE (Can ONLY be used by tax filers with valid SSN)

IRS Tax Return Transcripts are available on-demand at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)

- The IRS will conduct a 2-part authentication of the tax filer's identity. **You will need the name, SSN, date of birth, filing status and street address used on the last federal tax return filed.** You will also need immediate access to your e-mail account as you will receive a confirmation code you will need to enter, without closing the IRS page.
- Once authentication is complete, select the reason you are requesting a transcript (select "Higher Education/Student Aid").
- In the "Record of Account Transcripts" Box, choose the transcript for "2014". Your 2014 IRS Tax Return Transcript will open on-screen as a pdf document.
- Print the transcript, **write the Student's Name and their Fresno State ID# at the top of each page, and attach ALL pages to the Tax Filers Income Verification form.** When making copies of the transcripts, don't forget to also copy the back side of all the pages.

#### Get Transcript by MAIL (Can be used by tax filers who have a valid SSN or ITIN)

The online self-service Transcript Request is at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript)

- Enter the tax filer's SSN or ITIN, Date of Birth, Street Address and Zip/Postal Code used on the last federal tax return filed.
- Select "Record of Account Transcripts" and Tax Year "2014."
- If successfully validated, a paper IRS Tax Return Transcript arrives within 5–10 calendar days. Once received, **write the Student's Name and their Fresno State ID# at the top of each page, and attach ALL pages to the Tax Filers Income Verification form.** When making copies of the transcripts, don't forget to also copy the back side of all the pages.

#### PHONE- Get Transcript by MAIL (Can be used by tax filers who have a valid SSN or ITIN)

Available from the IRS by calling **1-800-908-9946**

- Follow the prompts to enter the tax filer's SSN or ITIN, and the numbers in their street address currently on file with the IRS.
- Select "OPTION 2" to request an IRS Tax Return Transcript and enter "2014."
- If successfully validated, a paper IRS Tax Return Transcript will be received (by the tax preparer) within 5 – 10 calendar days at the address on file with the IRS. Once received, **write the Student's Name and their Fresno State ID# at the top of each page, and attach ALL pages to the Tax Filers Income Verification form.** When making copies of the transcripts, don't forget to also copy the back side of all the pages.

**NOTE:** We are unable to process Tax Return Transcripts sent to us directly from the IRS – as there is no way to route the transcript to the appropriate student's file. **Transcripts must go directly to the tax-filer.** Once received, write the Student's Name and their Fresno State ID# at the top of each page, and attach all pages to the Tax Filer Income Verification.

### MARITAL STATUS & TAX FILING STATUS

If your marital status is "Married," there are two standard options for your IRS tax filing status:

- Married Filing Separate
- OR
- Married Filing Jointly

In very limited situations, a married tax filer may have a filing status other than the two listed.

**If your marital status is "Married" and you filed your taxes with a status of anything other than the two options listed above you must include the following when submitting your IRS Tax Return Transcript and Income Verification Form:**

- ⇒ **A signed letter from your TAX PREPARER**
  - The letter should be on **letterhead**, and must explain **why** your filing status meets IRS regulations.

**NOTE:** Failure to submit the letter with your Income Verification documents will delay processing of your student's file.