

- STUDENT/SPOUSE - 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. 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"/> Successfully used the IRS Data Retrieval function on the FAFSA on (date) _____ . <input type="checkbox"/> Unable to use IRS Data Retrieval function on the FAFSA: ⇒ Attach your 2014 IRS Tax Return Transcript <input type="checkbox"/> My marital status is "Legally Married" and tax filing status was "Married Filing Separately": ⇒ Attach copies of BOTH 2014 IRS Tax Return Transcripts | <input type="checkbox"/> My marital status is Separated, Divorced or been Widowed and tax filing status was "Married Filing Jointly": ⇒ Attach your 2014 IRS Tax Transcript AND copies of all 2014 W2, 1099, and K-1's <input type="checkbox"/> Filed or will file a 2014 Foreign Tax Return ⇒ Attach a signed and translated copy of the foreign tax return, showing the 2014 Adjusted Gross Income (AGI) and Tax paid |
|--|---|

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 | \$ |
| K-1: | \$ | | <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 | \$ |
| K-1: | \$ | | <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 _____ Spouse Signature (if married) _____ 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

- 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

- 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 zsafile) 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 file.