**2019-2020 Dependent Tax Information Worksheet**

**Dependent Student**

Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

1. **Dependent Student’s Information**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
| Student’s Last Name  |  | Student’s First Name  |  | MI |  | Student’s SSN or ID Number |
|  |  |  |
| Student’s Street Address (include apt. no.) |  |  | Student’s Date of Birth |
|  |  |  |  |
| City |  | State |  | Zip |  | Student’s Email Address |
|  |  |  |
| Student’s Phone Number |  | Student’s Alternate or Cell Phone Number  |

**B. Dependent Student’s Income Information to Be Verified**

**1. Tax Return Filers**

Instructions: Complete this section if the student filed or will file a 2017 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 2017 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed.

**Check the box that applies:**

The student has used the IRS DRT in FAFSA on the Web to transfer 2017 IRS income tax return information into the student’s FAFSA.

The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2017 IRS income tax return information into the student’s FAFSA.

The student is unable or chooses not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school with a **2017 IRS Tax Return Transcript(s).**

A **2017 IRS Tax Return Transcript** may be obtained through:

* Get Transcript by Mail - Go to [www.IRS.gov](http://www.IRS.gov), click “Get Your Tax Record.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and ***NOT*** the “IRS Tax Account Transcript.” The Transcript is generally received within 10 business days from the IRS’s receipt of the online request.
* Get Transcript ONLINE - Go to [www.IRS.gov](http://www.IRS.gov), click “Get Your Tax Record.” Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and ***NOT*** the “IRS Tax Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication.
* Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
* Paper Request Form – Use the links to download IRS Form [4506T-EZ](https://www.irs.gov/pub/irs-pdf/f4506tez.pdf) or IRS Form [4506-T](https://www.irs.gov/pub/irs-pdf/f4506t.pdf).The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form.

When requesting a transcript, use the Social Security Number (or the IRS individual taxpayer identification number) and the date of birth of the first person listed on the 2017 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2017 IRS income tax return).

In most cases, for electronic filers, 2017 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2017 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2017 paper IRS income tax returns, the 2017 IRS income tax information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2017 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.

Check here if a **2017 IRS Tax Return Transcript(s)** is provided.

Check here if a **2017 IRS Tax Return Transcript(s)** will be provided later.

**2. Nontax Filers**

The instructions and certifications below apply to the student. Complete this section if the student will not file and is not required to file a 2017 income tax return with the IRS.

**Check the box that applies:**

The student was not employed and had no income earned from work in 2017.

The student was employed in 2017 and has listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2017 IRS W-2 forms issued to the student by his/her employers]. List every employer even if they did not issue an IRS W-2 form.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

|  |  |  |
| --- | --- | --- |
| **Employer’s Name** | **2017 Amount Earned** | **IRS W-2 Attached?** |
|  *ABC Shipping (example)* |  *$1,280* |  *Yes* |
|  |  |  |
|  |  |  |
|  |  |  |

**C. Certification and Signatures**

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

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

**The student must sign and date.**

|  |  |  |
| --- | --- | --- |
|  |  |  |
| Student’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.***