## 2017-2018 Verification Worksheet

# WEST TEXAS A&M UNIVERSITY WTAMU Box 60939, Canyon, TX 79016

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Your 2017-2018 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 must ask you to confirm the information you reported on the FAFSA. To verify that you provided correct information, the financial aid administrator at WTAMU will compare your FAFSA with the information on this worksheet along with copies of your (your spouse's and/or parents') **2015 Federal RETURN Tax Transcripts with W2s** and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You (and at least one parent if you are a dependent) must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at WTAMU. WTAMU may ask for additional information. If you have questions about verification, contact the financial aid office at WTAMU as soon as possible so that your financial aid will not be delayed.

A. Student's Information

Student's First Name	Student's M.I.	Student's Social Security Numbe
clude apt. no.)		Student's Date of Birth
State	Zip Code	Student's Email Address
State	Zip Code	Student's Email Addre
	clude apt. no.)	clude apt. no.)

- INDEPENDENT List the people in <u>your household</u>, include: yourself, and your spouse if married, **and** your children, if you will provide more than half of their support from July 1, 2017 through June 30, 2018 **and** other people if they now live with you, and you currently provide more than half of their support and will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.
- **DEPENDENT** List the people in your <u>parents' household</u>, include: yourself and your parent(s) (including stepparent), and your parents' other children under 24 years of age if (a) your parents will provide more than half of their support from July 1, 2017 through June 30, 2018, or if (b) the children would be required to provide parental information when applying for Federal Student Aid, and other people if they now live with your parents, and your parents provided more than half of their support and will continue to provide more than half of their support from July 1, 2017 through June 30, 2018.

Write the names of all household members include their date of birth, ages and relationship to you. Identify any household members, who will be attending college at least half-time between July 1, 2017 and June 30, 2018, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page with the student's name and Buff ID at the top.

Full Name	Date of birth	Age	Relationship	College Enrolled at	Will be at Least Half Time
			Self	WTAMU	Yes/No

With few exceptions, state law gives you the right to request, receive, review and correct information about yourself collected on this form.

Student's Name:	Buff ID #	

#### B. Student's Income Information to Be Verified

- 1. Student Tax Filers-Complete this section if you and/or your spouse filed or will file a 2015 tax return.
- In order to complete verification of 2015 income information, WTAMU Financial Aid **requires** either the IRS Data Retrieval Tool **or** a 2015 IRS Tax Return Transcript. **Check the circle that applies:** 
  - O The student <u>has used</u> the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA (temporarily unavailable).
  - O The student <u>has not yet used</u> the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA.
  - O The student is <u>unable or chooses not to use</u> the IRS DRT in FAFSA on the Web, and instead will provide the WTAMU Financial Aid with a **2015 IRS Tax Return Transcript(s)**.

\* Instructions of how to obtain a Tax Transcript are located on the last page of this worksheet

Check here if a 2015 IRS Tax R	eturn <sup>·</sup>	Transcript(s)	is provided.	
Check here if a 2015 IRS Tax Re	eturn	Transcript(s)	will be provided late	er.

• In order to verify your and/or spouse's income earned from work please include in the box below all W2 income, self employment income, farm income, rental property income, and/or partnership income.

Employer's Name	2015 Amount Earned	IRS W2 Income?	Self- Employment Income?	Farm Income?	Rental Prop or Partnership Income?
Suzy's Auto Body Shop (example)	\$1500.00(example)		Yes(example)		

- For income earned from work additional documents must be turned in to verify the amounts.
  - o W2 for IRS W2 income
  - o Schedule C for Self-Employment income
  - Schedule F for Farm income
  - Value of Rental Property minus debt on property for rental property income
  - K-1 for Partnership Income
- 2. **Student Nontax Filers**-Complete this section if you and/or spouse will not file and <u>are not required</u> to file a 2015 income tax return with the IRS. **Check the circle that applies:** 
  - O The student and/or spouse were not employed and had no income earned from work in 2015.
    - If no income earned from work additional documentation may be required
  - O The student and/or spouse were employed in 2015 and have listed above the names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided [Provide copies of all 2015 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

>	Provide documentation from the IRS dated on or after October 1, 2016 that indicates a 2015 income tax
	return was not filed with the IRS or other relevant tax authority.

<sup>\*</sup>Instructions of how to obtain a Non-Filing Tax Transcript are located on the last page of this worksheet

Student's Name:	Buff ID #

- C. Dependent Student Parent's Income Information to Be Verified (each parent included in the household).
  - 3. Parent Tax Filers-Complete this section if your parent/parents filed, or will file, a 2015 tax return
  - In order to complete verification of 2015 income information, WTAMU Financial Aid **requires** either the IRS Data Retrieval Tool **or** a 2015 IRS Tax Return Transcript. **Check the circle that applies:** 
    - O The parents <u>have used</u> the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2015 IRS income tax return information into the student's FAFSA (temporarily unavailable).
    - O The parents <u>have not yet used</u> the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to transfer 2015 IRS income tax return information into the student's FAFSA.
    - O The parents are <u>unable or choose not to use</u> the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead will provide WTAMU Financial Aid with a **2015 IRS Tax Return Transcript(s)**.

\* Instructions of how to obtain a Tax Transcript are located on the last page of this worksheet

Check here if a 2015 IRS Tax Return	Transcript(s)	) is provi	ded.	
Check here if a 2015 IRS Tax Return	Transcript(s	<b>)</b> will be p	orovided I	ater.

• In order to verify your parent's income earned from work please include in the box below all W2 income, self employment income, farm income, rental property income, and/or partnership income.

Employer's Name	2015 Amount Earned	IRS W2 Income?	Self- Employment Income?	Farm Income?	Rental Prop or Partnership Income?
Suzy's Auto Body Shop (example)	\$1500.00(example)		Yes(example)		

- For income earned from work additional documents must be turned in to verify the amounts.
  - o W2 for IRS W2 income
  - Schedule C for Self-Employment income
  - o Schedule F for Farm income
  - o Value of Rental Property minus debt on property for rental property income
  - K-1 for Partnership Income
- 4. **Parent Nontax Filers**-Complete this section if the parents will not file and <u>are not required</u> to file a 2015 income tax return with the IRS. **Check the circle that applies:** 
  - O Neither parent was employed, nor neither had income earned from work in 2015.
    - o If no income earned from work additional documentation may be required
  - One or both parents were employed in 2015 and have listed above names of all employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Provide documentation from the IRS dated on or after October 1, 2016 that indicates that a 2015 IRS
income tax return was not filed with the IRS or other relevant tax authority.
Check here if confirmation of non-filing is provided

Check here if confirmation of non-filing will be provided later.	
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Student's Name:	Buff ID#	

#### A 2015 IRS Tax Return Transcript may be obtained through:

- ❖ Get Transcript by MAIL Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- ❖ Get Transcript by <u>ONLINE</u> Go to <u>www.irs.gov</u>, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."
- ❖ Automated Telephone Request 1-800-908-9946
- ❖ Paper Request Form IRS Form 4506T-EZ or IRS Form 4506-T

### A **2015 IRS Non-Filing Tax Transcript** may be obtained through:

- Get Transcript by Mail Download form 4506-T from <a href="www.irs.gov">www.irs.gov</a>, mail or fax the completed form to the appropriate address (or fax number) at the IRS. <a href="Make sure to check box 7">Make sure to check box 7</a> for 'Verification of Non-filing' After the IRS receives and processes the signed request the Non-Filing letter will be mailed within 5 to 10 business days.
- Get Transcript ONLINE Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." After logging in select the appropriate 2015 tax year and select form Verification of Non-Filing.

When you receive the IRS tax return transcript, please submit it to WTAMU Financial Aid with your Buff ID number included on each page of the report.

## D. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student (if student is dependent) and one parent whose information is reported on the FAFSA must sign and date.	WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.
Student's Signature	Date
Print Student's Name	Student Buff ID #
Parent's Signature	Date

Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to WTAMU Financial Aid.
You should make a copy of this worksheet for your records.