2014 IRS Tax Filer Information

If you will file or have already completed your Federal Tax Return for 2014, please complete the IRS Data Retrieval process to transfer your 2014 Federal Tax Return information onto the FAFSA. The benefit of utilizing the IRS Data Retrieval process is that it will simplify and expedite your verification process. Electronically filed tax return information will be available online from the IRS site in 1-2 weeks after the return has been filed; data from paper tax returns will be available in 6-8 weeks. **This is our preferred method.**

- Log into your FAFSA at www.fafsa.ed.gov.
- Elect to use the Data Retrieval process.
- You will be taken to the IRS website where you will enter personal information to process the retrieval. Check the “Transfer My Tax Information into the FAFSA” box.
- Once completed, you will return to the FAFSA, make sure to sign with all electronic PINs required.
- If successful, you will not need to provide a copy of your tax return transcript to our office.

**IMPORTANT:** If you do not complete or are unable to complete the IRS Data Retrieval process, you must submit a 2014 Tax Return Transcript to our office. If you are married and did not file a Married filing jointly tax return for 2012, we will need a copy of your spouse’s 2014 Tax Return Transcript as well. DO NOT send any tax return (1040/1040A/1040EZ/1040X) forms to our office. If you, your accountant or the IRS amended your return in 2014, you must submit both an IRS Tax Return Transcript and an IRS Tax Account Transcript. Please include the student’s name and University Identification Number (UIN) on every document submitted to our office.

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**How to Get a Tax Return Transcript from the IRS**

<table>
<thead>
<tr>
<th>On-Line (Preferred)</th>
<th>Automated Phone System</th>
<th>By Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.irs.gov/Individuals/Get-Transcript">www.irs.gov/Individuals/Get-Transcript</a></td>
<td>1(800)908-9946</td>
<td>Complete Form 4506T-EZ</td>
</tr>
</tbody>
</table>

Information Required:
- Social Security #
- Filing Status
- Date of Birth
- Street address
- Zip Code or Postal Code

**How to Request a Tax Account Transcript from the IRS for amended taxes**

<table>
<thead>
<tr>
<th>On-Line (Preferred)</th>
<th>Automated Phone System</th>
<th>By Mail</th>
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</thead>
<tbody>
<tr>
<td><a href="http://www.irs.gov/Individuals/Get-Transcript">www.irs.gov/Individuals/Get-Transcript</a></td>
<td>1(800)908-9946</td>
<td>Complete Form 4506-T</td>
</tr>
</tbody>
</table>

Information Required:
- Social Security #
- Filing Status
- Date of Birth
- Street address
- Zip Code or Postal Code

**On-Line (Preferred)**

- Enter your Social Security #
- Enter the Numbers in your street address
- Option 2 (Transcript of Tax Return)
- Enter the year of the Return you are requesting

**Automated Phone System**

- Enter your Social Security #
- Enter the Numbers in your street address
- Option 2 (Transcript of Tax Return)
- Enter the year of the Return you are requesting

**By Mail**

- Complete Form 4506T-EZ
- Mail to: RAIVS Team Stop 37106 Fresno, CA 93888
- Fax: (559)456-5876

- Complete Form 4506-T
- Mail to: RAIVS Team Stop 37106 Fresno, CA 93888
- Fax: (559)456-5876
## 2015-2016 Dependent Verification Worksheet

### Section A – Student Information (Please print clearly)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
<th>Email</th>
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<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Street Address</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
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</tbody>
</table>

### Section B – Family Information (Please read instructions before completing)

Please list the people in your parent(s)’ household, including:
- yourself and your parents(s) (including stepparent) even if you don’t live with your parents, and
- your parents’ other children, even if they don’t live with your parent(s), if (a) your parents will provide more than half of their support from **July 1, 2015 through June 30, 2016**, or (b) the children who 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 provide more than half of their support and will continue to provide more than half of their support from **July 1, 2015 through June 30, 2016**.

Write the names of all household members in the space(s) below. If you need more space, attach a separate sheet. Also, write in the name of the college for any household member listed (excluding your parent(s)), who will be attending college at least half-time between **July 1, 2015 and June 30, 2016**, and will be enrolled in a degree, diploma, or certificate program.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
<th>Expected Graduation (Month/Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td></td>
<td>Self</td>
<td>UIS</td>
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</tbody>
</table>

**ENTER YOUR 9-DIGIT UIN:**

1516  DPVR-E  B
Section C – Student and Parent Income Information

1. As per the instructions, you and your parents have two options in which to provide your official federal tax information for 2014. Please check below the method in which you are providing this information to the Office of Student Financial Aid.

You: □ Completed FAFSA IRS Data Retrieval □ Official IRS Tax Return Transcript – Attached
Your Parent(s): □ Completed FAFSA IRS Data Retrieval □ Official IRS Tax Return Transcript – Attached

2. For those people who are not required to file a 2014 federal income tax return per the IRS regulations, please indicate so below. Check the appropriate individual(s) and submit W-2 and 1099-Misc. forms for 2014.

□ Student was not employed and had no income earned from work in 2014
□ Parent was not employed and had no income earned from work in 2014
□ The student/parent was employed in 2014. Please list below the names of all the 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/parent 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 University Identification Number at the top.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>Student</th>
<th>Parent</th>
<th>2014 Amount Earned</th>
<th>IRS W-2 Attached?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suzy’s Auto Body Shop (example)</td>
<td>X</td>
<td>$2,000.00 (example)</td>
<td>Yes (example)</td>
<td></td>
</tr>
</tbody>
</table>

3. In 2013 or 2014, did you, your parents or anyone in your parents’ household (those listed in Section B of this form) receive benefits from the Supplemental Nutrition Assistance Program (SNAP)? Please indicate the correct answer below.

□ No one in our household received Supplemental Nutrition Assistance Program (Food Stamps) benefits in 2013 or 2014.

□ My parent(s)/stepparent received Supplemental Nutrition Assistance Program (Food Stamps) benefits in 2013 or 2014. You must attach documentation from the agency that issued the benefit to verify receipt. Include student’s name and University Identification Number (UIN) on all documents submitted to our office.

4. Looking at those individuals listed in Section B of this form, did you or any parent PAY child support because of divorce or separation or as a result of a legal requirement in 2014? Please indicate correct answer below. If you indicated “YES”, you will also need to submit a signed statement by the applicant and parent (who paid the child support) certifying the following: 1) The amount of child support paid, 2) The name of the person to whom child support was paid, and 3) The name of the children for whom child support was paid.

□ Yes □ No

ENTER YOUR UIN

Page 2 of 3
Dependent Verification Worksheet

Section C – Student and Parent Income Information – (Continued)

5. Both tax filers and non-tax filers must list any untaxed income received in 2014. Please complete chart below:

<table>
<thead>
<tr>
<th>Student</th>
<th>Parent(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Calendar Year 2014 (January 1, 2014 - December 31, 2014)

**Be sure to enter zero (0) if no funds were received**

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. **Don’t include** amounts reported in code DD.

$__________  **Please provide copies of W-2’s**

Child support **RECEIVED** for any of your parents’ children. **Don’t include** foster care or adoption payments.

$__________

Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don’t include** the value of on-base military housing or the value of a basic military allowance for housing.

$__________

Veteran’s noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

$__________

Other untaxed income not reported, such as workers’ compensation, disability, etc. **Don’t include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

$__________

Other money received, or paid on your behalf, not reported elsewhere on this form (exclude support from parents). For example, a friend or relative is helping pay your bills.

$__________  **$ XXXXX**

Section D – Student and Parent Signatures

By signing this worksheet, I/we certify that all the information reported on this worksheet is correct to the best of our knowledge. If the UIS Office of Financial Assistance notices a discrepancy, I/we understand corrections to my FAFSA will be submitted directly to the U.S. Department of Education. Additionally, I/we understand that any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2015-16 academic year.

Student Signature                              Date  Parent’s Signature                              Date

IMPORTANT: To avoid a delay in processing, please review to make sure that every question has been answered.