

Student's Name _____ SSN: _____

C. Verification of 2016 IRS Income Tax Return Information for Student Tax Filers

Instructions: Complete this section if the student filed or will file a 2016 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 2015 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

The student has used the IRS DRT in *FAFSA on the Web* to transfer 2016 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 2016 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 a **2016 IRS Tax Return Transcript(s), W-2 Forms, and other IRS documents**. (signature not required)

A 2016 IRS Tax Return Transcript may be obtained through the:

- 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 ONLINE – Go to www.irs.gov, 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

___ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.

___ Check here if a 2016 IRS Tax Return Transcript(s) will be provided later.

Verification of 2016 Income Information for Student Nontax Filers

Complete this section if the student will not file and is not required to file a 2016 income tax return with the IRS.

Check the box that applies:

The student was not employed and had no income earned from work in 2016.

The student was employed in 2016 and has listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 IRS W-2 forms issued to the student by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

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

Employer's Name	2016 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of nonfiling is provided.

___ Check here if confirmation of nonfiling will be provided later.

Student's Name _____ SSN: _____

D. Verification of 2016 IRS Income Tax Return Information for Parent Tax Filers

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after the end of the 2016 tax year on December 31, 2016.

Instructions: Complete this section if the parents filed or will file a 2016 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 2016 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check the box that applies:

The parents have used the IRS DRT in *FAFSA on the Web* to transfer 2016 IRS income tax return information into the student's FAFSA.

The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA once the 2016 IRS income tax return has been filed.

The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and instead will provide the school a **2016 IRS Tax Return Transcript(s), W-2 Forms, and other IRS documents.** (signature not required)

A 2016 IRS Tax Return Transcript may be obtained through the:

- 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 ONLINE – Go to www.irs.gov, 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

If the parents filed separate 2016 IRS income tax returns, **2016 IRS Tax Return Transcripts** must be provided for both.

___ Check here if a **2016 IRS Tax Return Transcript(s)** is provided.

___ Check here if a **2016 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2016 Income Information for Parent Nontax Filers

The instructions and certifications below apply to each parent included in the household. Complete this section if the parents will not file and are not required to file a 2016 income tax return with the IRS. You must complete a 2018-2019 Living Expense Statement form. It can be located at <http://trojan.troy.edu/financialaid> under **2018-2019 Forms.**

Check the box that applies:

One parent was not employed and had no income earned from work in 2016.

Neither parent was employed and had no income earned from work in 2016.

One or both parents were employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form is provided. [Provide copies of all 2016 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. If more space is needed, provide a separate page with the student's name and social security number at the top.

Employer's Name	2016 Amount Earned	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00 (example)	Yes (example)

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

___ Check here if confirmation of nonfiling is provided.

___ Check here if confirmation of nonfiling will be provided later.

Student's Name _____ SSN: _____

Instructions: Please complete all the fields below. If any field is left blank, we will consider the form incomplete, we will **NOT** assume 0.

STUDENT	2016 Additional Financial Information	PARENT(S)
	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 33	
	Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children you claimed in household size.	
	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	
	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	
	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	
	Cooperative education program earnings.	

STUDENT	2016 Untaxed Income	PARENT(S)
	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 Form in Boxes 12a through 12d, codes, D, E, F, G, H, and S.	
	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17.	
	Child support received for all children. Don't include foster care or adoption fees.	
	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b	
	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11A minus 11b). Exclude rollovers. If negative, enter a zero here.	
	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	
	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.	
	Veterans' non-education 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. Also include the untaxed portions of health savings accounts from IRS form 1040- line 25. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending plans (e.g. cafeteria plan), foreign income exclusion or credit for fed tax on special fuels.	
	Money received, or paid on your behalf (e.g. bills) not reported elsewhere on form.	

Student's Name _____ SSN: _____

F. Certification and Signature

Please check each box and sign and date at the bottom of the form to affirm that you acknowledge and understand that:

You must complete the FAFSA IRS Data Retrieval or submit a copy of your 2016 IRS Tax Return Transcript, W-2(s), and other IRS documents when you file your IRS income tax return for verification to be considered complete.

Adjustments to your financial aid eligibility may be required due to the results of this verification process, which may change the sources and amounts of your Financial Aid Award offer.

If you file or later file an amended 1040X tax form, you agree to notify Troy University's Financial Aid Office and submit: A 2016 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **and** A signed copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent must sign and date.

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

Student's Signature

Date

Parent's Signature

Date