

How to Provide 2016 Tax Information

Per updated Federal Regulations, the Office of Financial Aid **cannot accept copies of your 2016 federal tax returns (1040 forms)**. Instead, this information can be provided in one of the following ways, even if the tax information on your FAFSA already matches what is on your 2016 tax return. This is required for all tax filers on the 2018 – 2019 FAFSA.

TAXES

1. Update your 2018-2019 FAFSA using the IRS Data Retrieval Tool

- Go to FAFSA.gov, log into your FAFSA record, select “*Make FAFSA Corrections*,” and navigate to the *Financial Information* section of the form
- From *Financial Information* section, follow the instructions to determine if the student and parent(s) are eligible to use the *IRS Data Retrieval Tool* to transfer 2016 IRS income tax information into the FAFSA
- It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers
- After the FAFSA corrections have been made using the IRS Data Retrieval Tool, it will automatically be forwarded to the Office of Financial Aid

OR

2. Provide a 2016 IRS Tax Return Transcript

(You will need your Social Security Number, date of birth, and the address used on your 2016 taxes)

- To obtain a 2016 IRS Tax Return Transcript, go to <https://www.irs.gov/Individuals/Get-Transcript> or call 1-800-908-9946
- Your 2016 federal tax returns must first be filed with the IRS before a Tax Return Transcript can be requested
- If they have or will file a tax return, the student and the parent(s) appearing on the FAFSA must provide a Tax Return Transcript
- Make sure to request the “IRS Tax Return Transcript” and **not** the “IRS Tax Account Transcript” for the tax year ending December 31, 2016.

3. Non-Tax Filers: You must obtain a Non-filing letter from the IRS

(This form must only be submitted by parent(s) of dependent students who did not file taxes in 2016)

- Log onto www.irs.gov/transcript and click on “Get Transcript by MAIL”. The individual will be instructed to enter their social security number, date of birth, street address, and zip code. After that is complete, they will be given different options for ordering a transcript. Select “Return Transcript”, and choose the tax year ending December 31, 2016.

OR

- Download the IRS Form 4506-T at www.irs.gov/pub/irs-pdf/f4506t.pdf and follow the instructions on the form.

~AND~

Copies of all 2016 W-2’s are required for tax filers, and non-tax filers

- All students and parents who worked and earned income for 2016 must provide copies of all 2016 W-2 forms issued to the student/parent and spouse by their employers.
- For those unable to obtain W-2’s, you may go to the IRS website (www.irs.gov) and obtain a “2016 Wage and Income Transcript”. This will be accepted in lieu of missing W-2’s.

C. Student Income Information

Check only one of the boxes below then submit the corresponding documents requested.	Submit the following documents																		
<input type="checkbox"/> I have filed or will file a 2016 Federal Income Tax Return and submit the information by using the: Did the student file an amended tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2016 Tax Return Transcript	Once tax returns are filed, update your FAFSA by using the <i>IRS Data Retrieval Tool</i> if eligible, OR send us your 2016 Tax Return Transcript.* If YES , you must submit: 2016 Signed 1040X AND 2016 Tax Return Transcript and all W-2's																		
<input type="checkbox"/> I did not work and am not required to file a 2016 Federal Income Tax Return.	No documentation required.																		
<input type="checkbox"/> I worked but am not required to file a 2016 Federal Income Tax Return. The student was employed in 2016. List 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 ID number at the top.																			
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Employer's Name</th> <th style="width: 20%;">Annual Amount Earned in 2016</th> <th style="width: 20%;">IRS W-2 Provided?</th> </tr> </thead> <tbody> <tr> <td><i>Sally's Pet Shop (example)</i></td> <td style="text-align: center;"><i>\$1,500.00</i></td> <td style="text-align: center;"><i>Yes</i></td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td style="text-align: right;">Total Amount of Income Earned From Work</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table>		Employer's Name	Annual Amount Earned in 2016	IRS W-2 Provided?	<i>Sally's Pet Shop (example)</i>	<i>\$1,500.00</i>	<i>Yes</i>										Total Amount of Income Earned From Work	\$	
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D. Parent Income Information

Check only one of the boxes below then submit the corresponding documents requested.	Submit the following documents																		
<input type="checkbox"/> I have filed or will file a 2016 Federal Income Tax Return and submit the information by using the: Did either parent(s) file an amended tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> FAFSA IRS Data Retrieval Tool <input type="checkbox"/> 2016 Tax Return Transcript	Once tax returns are filed, update your FAFSA by using the <i>IRS Data Retrieval Tool</i> if eligible, OR send us your 2016 Tax Return Transcript.* If YES , you must submit: 2016 Signed 1040X AND 2016 Tax Return Transcript and all W-2's																		
<input type="checkbox"/> I did not work and am not required to file a 2016 Federal Income Tax Return.	Non-filing letter from the IRS. (see instructions below)																		
<input type="checkbox"/> I worked but am not required to file a 2016 Federal Income Tax Return. You must provide a non-filing letter from the IRS. (see instructions below) One or both parents were employed in 2016. List 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 parent(s) 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 ID number at the top.																			
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****Log onto www.irs.gov to obtain the Non-Filing Letter from the IRS. For further information, please see detailed instructions on the front page of the Verification worksheet****

E. Certification and Signature

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

Student Signature - **required**

Date

Parent Signature - **required**

Date

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