



## Section C. Dependent Student's Income Information to Be Verified

1. **Complete this section if a 2016 Tax Return was filed.** - This question is only for those who filed a 2016 Federal Income Tax Return with the IRS and used the IRS Data Retrieval Tool). NOTE: The IRS Data Retrieval Tool is not available for Dream (AB540) Application Filers or if you filed an amended tax return.

**TAX RETURN FILERS**— Important Note: If the student's parent(s) filed, or will file, an amended 2016 IRS tax return, the student *must* contact the financial aid administrator before completing this section.

**Instructions:** Complete this section if the student, filed or will file a 2016 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA. It takes up to three 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. If you need more information about when or how to use the IRS Data Retrieval Tool, see your financial aid administrator.*

**Check only the box that applies:**

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2016 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- Check here if you are either a: Dream Application Filer OR unable to OR choose not to use the IRS Data Retrieval Tool and you are submitting a paper copy of a 2016 IRS Tax Return Transcript from the IRS with this worksheet. To obtain an IRS Tax Return Transcript, go to [www.IRS.gov](http://www.IRS.gov) and click on the "Get a Tax Transcript" link, or call 1-800-908-9946. Make sure to request the "**IRS Tax Return Transcript**" and *not* the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2016 IRS tax return was filed).

2. **Complete this section if a 2016 Tax Return was not filed.**

**TAX RETURN NON-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 only the box that applies:**

- The student was not employed and had no income earned from work in 2016. Indicate below the source of income and/or support for 2016 and the amount received in 2016 (if applicable).
- The student was employed in 2016 and has listed below the names of all the student's employers, the amount earned from each employer in 2016, and whether an IRS Wage and Income Transcript is attached.

If you indicated employment in part 2 of Section C, even if you did not file a 2016 Tax Return you are required to attach a copy of your **2016 IRS Wage and Income Transcript** obtained from the IRS, issued to the student. Your IRS Wage and Income Transcript will list all of your W-2s for the 2016 tax year. You may follow the instructions for the IRS listed above. If you were not eligible to receive W-2s, you will need to provide a signed statement explaining the reason the form is not available and listing the amount and sources of income earned from work. *List every employer, even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and student ID# at the top.*

Employer's Name /Source of Income/Support	2016 Amount Earned or Received	IRS Wage Tran Attached

3. **Amended Tax Return Filers** (This question is for those who filed a 2016 IRS tax return and amended it)  
Did you file an amended 2016 federal tax return with the IRS?

Yes  If yes, you must submit the following:

No  Answer either Part 1 or 2 above, not both

- Paper copy of the 2016 IRS "Tax Return" Transcript (AND)
- A signed copy of the Amended 2016 1040X

### Section D. Parent's Income Information to Be Verified

Note: If two parents were reported in Section A of this worksheet, the instructions and certifications below refer, and apply, to both parents.

1. Complete **this section if a 2016 Tax Return was filed** - This question is only for those who filed a 2016 Federal Income Tax Return with the IRS and used the IRS Data Retrieval Tool). NOTE: The IRS Data Retrieval Tool is not available for Dream (AB540) Application Filers or if you filed an amended tax return.

**TAX RETURN FILERS**—Important Note: If the student's parent(s) filed, or will file, an amended 2016 IRS tax return, the student *must* contact the financial aid administrator before completing this section.

**Instructions:** Complete this section if the student's parent(s), filed or will file a 2016 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student may go to [FAFSA.gov](http://FAFSA.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2016 IRS income tax information into the student's FAFSA. It takes up to three 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. If you need more information about when or how to use the IRS Data Retrieval Tool, see your financial aid administrator.*

**Check only the box that applies:**

- The student's parent(s) has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2016 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- Check here if you are either a: Dream Application Filer OR unable to OR choose not to use the IRS Data Retrieval Tool and you are submitting a paper copy of a 2016 IRS Tax Return Transcript from the IRS with this worksheet. To obtain an IRS Tax Return Transcript, go to [www.IRS.gov](http://www.IRS.gov) and click on the "Get a Tax Transcript" link, or call 1-800-908-9946. Make sure to request the "**IRS Tax Return Transcript**" and *not* the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2016 IRS tax return was filed).

2. **Complete this section if a 2016 Tax Return was not filed.**

**TAX RETURN NON-FILERS** - Complete this section if the student's parent(s) will not file, and is not required to file a 2015 income tax return with the IRS.

**Check only the box that applies:**

- The student's parent(s) was not employed and had no income earned from work in 2016. Indicate below parent(s) source of income and/or support for 2016 and the amount received in 2016 (if applicable).
- The student's parent(s) 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 Wage and Income Transcript is attached.

Regardless of the box marked in part 2 of Section D, even if parent(s) did not file a 2016 Tax Return you are required to attach a copy of your parent(s) **2016 IRS Wage and Income Transcript** and a **2016 Verification of Non-filing Letter** (*dated on or after 10/01/2017*), obtained from the IRS, issued to the parent(s). The IRS Wage and Income Transcript will list all of W-2s for the 2016 tax year. You may follow the instructions for the IRS listed above. If you were not eligible to receive W-2s, you will need to provide a signed statement explaining the reason the form is not available and listing the amount and sources of income earned from work

Employer's Name/Source of Income/Support	2016 Amount Earned or Received	IRS Wage Tran Attached

3. **Amended Tax Return Filers** (This question is for those who filed a 2016 IRS tax return and amended it)  
 Did your parent(s) file an amended 2016 federal tax return with the IRS?

Yes  If yes, your parent(s) must submit the following:      No  Answer either Part 1 or 2 above, not both

- Paper copy of the 2016 IRS "Tax Return" Transcript (AND)
- A signed copy of the Amended 2016 1040X

**Section E. Additional Required Information**

1. During 2016 was child support paid by any member of the above-listed household?

Yes  No If yes, name of household member who paid child support below:

Name of Person who Paid Child Support	Name of Person to Whom Child Support was Paid	Name(s) of Child(ren) for Whom Support Was Paid	Amount of Child Support Paid in 2017

2. During 2016 or 2017 did any member of the above-listed household receive Food Stamps – Supplemental Nutrition Assistance Program (SNAP) benefits?

Yes  No If yes, name(s) of household member(s) who received these benefits: \_\_\_\_\_

**Section F. Certification and Signatures**

Each person signing below certifies that all of the information reported is complete and correct. **WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.**

\_\_\_\_\_  
 Student's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent's Signature

\_\_\_\_\_  
 Date

*Do not mail this worksheet to the U.S. Department of Education Please submit this worksheet to the financial aid administrator at your school.*