

# 2012-2013 Dependent Student & Parent Verification Worksheet

## For Federal Student Aid Programs at Western Illinois University

*Submit this signed worksheet with requested documents to:  
Financial Aid Office, Sherman Hall 127, Western Illinois University, 1 University Circle, Macomb, IL 61455  
(Or fax to 309-298-2353)*

Your financial aid application was selected for review in a process called "Verification." In this process we will compare information from your FAFSA with your and your parent(s)' 2011 federal tax information and/or other financial documents.

### A. Student Information

|               |            |                                  |                            |
|---------------|------------|----------------------------------|----------------------------|
| Last Name     | First Name | M.I.                             | Address (include apt. no.) |
| WIU ID#       | City       |                                  | State                      |
| Date of Birth |            | ZIP Code                         |                            |
| Date of Birth |            | Phone Number (include area code) |                            |

### B. Household Information

• List *yourself below*:

| Full Name | Age |
|-----------|-----|
|           |     |

• List *your parent(s) below*: If your parents are separated or divorced, include only the parent whose information you were required to provide on the financial aid application. If the parent you counted has married or remarried and you have a stepparent, you must include information about your stepparent **even if they were not married in 2011**.

| Full Name | Date of Birth | Relationship to Student |
|-----------|---------------|-------------------------|
|           |               |                         |
|           |               |                         |

- List your parent(s)' **other children below** if your parent(s) will provide more than half of their support from July 1, 2012 through June 30, 2013 or if the children would be required to provide parental information when applying for federal student aid.
- Include other people **only** if they now live with your parent(s) and receive more than half of their support from your parent(s), **AND** will continue to get this support from July 1, 2012 through June 30, 2013.
- Write in the name of the college for those who will be attending college at least half-time between July 1, 2012 and June 30, 2013, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

| Full Name | Age | Relationship to Student | Name of College, If Attending |
|-----------|-----|-------------------------|-------------------------------|
|           |     |                         |                               |
|           |     |                         |                               |
|           |     |                         |                               |
|           |     |                         |                               |

**C. Child Support Paid in 2011**

Check one box:

- No one in my parent(s)' household **paid** any child support in 2011.
- Someone in my parent(s)' household paid child support in 2011. Complete the chart below.

| Who Paid Child Support | Amount Paid in 2011 | Who Received Support | Name of Child for Whom Child Support Paid |
|------------------------|---------------------|----------------------|-------------------------------------------|
|                        |                     |                      |                                           |
|                        |                     |                      |                                           |
|                        |                     |                      |                                           |

**D. Supplemental Nutrition Assistance Program (SNAP/Food Stamps) Received**

Check one box:

- No one in my parent(s)' household received Supplemental Nutrition Assistance during the 2010 or 2011 calendar year.
- My parent (whose signature is on this form), or someone included in their household on the FAFSA, received Supplemental Nutrition Assistance during the 2010 or 2011 calendar year.

**E. Income Information From 2011**

1. Student (check one box):

- I did not work in 2011 and had \$0 income.
- I will not file and am not required to file a 2011 federal income tax return.
  - Submit W-2 Forms from each 2011 employer.
  - Complete the table below.

| Name of Employers or Sources of Income | Total Received in 2011 | Is W-2 Submitted? | If W-2 not submitted, explain why you do not have a W-2. |
|----------------------------------------|------------------------|-------------------|----------------------------------------------------------|
|                                        | \$                     |                   |                                                          |
|                                        | \$                     |                   |                                                          |
|                                        | \$                     |                   |                                                          |

- I will use the IRS Data Retrieval Tool to transfer my unaltered tax information from IRS to my FAFSA. If taxes recently filed, wait 2 weeks (if electronically filed) or 8 weeks (if mailed) before using the tool.
- I have already used the IRS Data Retrieval Tool to transfer my unaltered tax information from IRS to my FAFSA.
- I am not able or choose not to use the IRS Data Retrieval Tool and will submit the tax information as indicated below. Answer "Yes" to one of the following:

\_\_\_\_\_ I filed an amended tax return – submit both a Tax Return Transcript\* and a Tax Account Transcript.\*\*

\_\_\_\_\_ I could not use the IRS Data Retrieval Tool - submit a Tax Return Transcript\* and complete the following statement:

I could not use the IRS Data Retrieval Tool because \_\_\_\_\_

\_\_\_\_\_ I filed a Puerto Rican or foreign tax return – submit a copy of the tax return.

**2. Parent** (check one box):

- My parent(s) will not file and are not required to file a 2011 federal income tax return.
  - Submit W-2 Forms from each 2011 employer.
  - Complete the table below.

| Name of Employers or Sources of Income | Total Received in 2011 | Is W-2 Submitted? | If W-2 not submitted, explain why you do not have a W-2. |
|----------------------------------------|------------------------|-------------------|----------------------------------------------------------|
|                                        | \$                     |                   |                                                          |
|                                        | \$                     |                   |                                                          |
|                                        | \$                     |                   |                                                          |

- My parent(s) will use the IRS Data Retrieval Tool to transfer their unaltered tax information from IRS to my FAFSA. If taxes recently filed, wait 2 weeks (if electronically filed) or 8 weeks (if mailed) before using the tool.
- My parent(s) have already used the IRS Data Retrieval Tool to transfer their unaltered tax information from IRS to my FAFSA.
- My parent(s) are not able or choose not to use the IRS Data Retrieval Tool and will submit the tax information as indicated below. Answer "Yes" to one of the following:

\_\_\_\_\_ My parent(s)' tax filing status is Married Filing Separately – submit a Tax Return Transcript\* for both filers.

\_\_\_\_\_ My parent(s)' tax filing status is Head of Household – submit a Tax Return Transcript\* for both filers, if married.

\_\_\_\_\_ My parent(s) filed an amended tax return – submit both a Tax Return Transcript\* and a Tax Account Transcript.\*\*

\_\_\_\_\_ My parent(s) could not use the IRS Data Retrieval Tool - submit a Tax Return Transcript\* and complete the following statement:  
My parent(s) could not use the IRS Data Retrieval Tool because \_\_\_\_\_

\_\_\_\_\_ My parents(s) filed a Puerto Rican or foreign tax return – submit a signed copy of the tax return.

**F. Sign This Worksheet**

By signing this worksheet, we certify that all the information reported to qualify for Federal student aid is complete and correct. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

\_\_\_\_\_  
 Student (signature required)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent (signature required)

\_\_\_\_\_  
 Date

**Be aware that incomplete and/or unsigned forms will delay processing.**

# NEW VERIFICATION PROCESS FOR 2012-13!

**We can no longer accept a copy of your tax return unless you filed a Puerto Rican or foreign tax return.**

1. 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 or parent(s) have not already used the tool, 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 student and/or parent is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student's FAFSA.
2. If you or your parent(s) are unable or choose not to use the Data Retrieval Tool, use the instructions below to request the IRS tax information.

Note: IRS tax information is usually available to retrieve or to request 2 weeks after filing electronically or 8 weeks after mailing if you do not owe a refund. If you owe a refund, your 2011 tax information might not be available until after May 14, 2012.

Note: The IRS Tax Return Transcript and Tax Account Transcript request process does not allow multiple transcript requests for the same year. **Please keep your original transcript(s) and send us a photocopy.**

| *How to Request a Tax Return Transcript from the IRS                                                                                                                                                                                                                       |                                                                                                                                                                                                                                      |                                                                                                                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Automated Phone System                                                                                                                                                                                                                                                     | On-Line                                                                                                                                                                                                                              | By Mail                                                                                                                                                  |
| <b>1(800)908-9946</b> <ul style="list-style-type: none"> <li>• Enter filer's Social Security #</li> <li>• Enter the Numbers in filer's street address</li> <li>• Option 2 (Transcript of Tax Return)</li> <li>• Enter the year of the Return you are requesting</li> </ul> | <a href="http://IRS.gov">IRS.gov</a> <p><u>Information Required:</u></p> <ul style="list-style-type: none"> <li>• Social Security #</li> <li>• Date of Birth</li> <li>• Street address</li> <li>• Zip Code or Postal Code</li> </ul> | <b>Complete Form <a href="#">4506T-EZ</a></b> <p><u>Mail to:</u><br/>RAIVS Team<br/>Stop 37106<br/>Fresno, CA 93888</p> <p><u>Fax:</u> (559)456-5876</p> |

| **How to Request a Tax Account Transcript from the IRS for amended taxes                                                                                                                                                                                                                     |                                                                                                                                                                                                                                      |                                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Automated Phone System                                                                                                                                                                                                                                                                       | On-Line                                                                                                                                                                                                                              | By Mail                                                                                                                                                |
| <b>1(800)908-9946</b> <ul style="list-style-type: none"> <li>• Enter filer's Social Security #</li> <li>• Enter the Numbers in filer's street address</li> <li>• Option 4 (Transcript of Account/Transcript of Return)</li> <li>• Enter the year of the Return you are requesting</li> </ul> | <a href="http://IRS.gov">IRS.gov</a> <p><u>Information Required:</u></p> <ul style="list-style-type: none"> <li>• Social Security #</li> <li>• Date of Birth</li> <li>• Street address</li> <li>• Zip Code or Postal Code</li> </ul> | <b>Complete Form <a href="#">4506-T</a></b> <p><u>Mail to:</u><br/>RAIVS Team<br/>Stop 37106<br/>Fresno, CA 93888</p> <p><u>Fax:</u> (559)456-5876</p> |

The law says we have the right to ask you for this information before awarding federal aid. We must review the information under the financial aid program rules (DFR Title 34, Part 668).

If there are differences between your application information and your financial aid documents, we may need to send corrections electronically to have your information reprocessed. If corrections are sent, you will receive a new Student Aid Report from the federal processor.

Contact the Financial Aid Office at [FINANCIAL-AID@WIU.EDU](mailto:FINANCIAL-AID@WIU.EDU) or 309-298-2446 if you have questions.