

2012-2013 Independent Student Verification Worksheet

For Federal Student Aid Programs at Western Illinois University

*Submit this 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 spouse’s, if you are married) 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 spouse below, if you have one*: Do not include spouse if you are divorced, separated, or widowed.
- Write in the name of the college if your spouse 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.

Full Name: _____ Age: _____
College Spouse Is Attending: _____

- List your *children below* if you provide more than half of their support from July 1, 2012 through June 30, 2013.
- Include other people **only** if they now live with you and receive more than half of their support from you, **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 household **paid** any child support in 2011.
- I, or someone included in my 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 household received Supplemental Nutrition Assistance during the 2010 or 2011 calendar year.
- I, or someone included in my 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:
 - ____ My tax filing status is Single, but I am now married – submit a Tax Return Transcript* for both filers.
 - ____ My tax filing status is Married Filing Separately – submit a Tax Return Transcript* for both filers.
 - ____ My tax filing status is Head of Household – submit a Tax Return Transcript* for both filers, if married.
 - ____ 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 IRS Data Retrieval Tool because _____

____ I filed a Puerto Rican or foreign tax return – submit a signed copy of the tax return.

2. Spouse (if you are married, check one box):

- I filed jointly with my spouse.
- My spouse did not work in 2011 and had \$0 income.
- My spouse will not file and is 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 spouse is not able or chooses not to use the IRS Data Retrieval Tool and will submit the tax information indicated below. Answer "Yes" to one of the following:

- ____ My spouse's tax filing status is Single, but we are now married – submit a Tax Return Transcript* for both filers.
- ____ My spouse's tax filing status is Married Filing Separately – submit a Tax Return Transcript* for both filers.
- ____ My spouse's tax filing status is Head of Household – submit a Tax Return Transcript* for both filers.
- ____ My spouse filed an amended tax return – submit both a Tax Return Transcript* and a Tax Account Transcript**.
- ____ My spouse could not use the IRS Data Retrieval Tool - submit a Tax Return Transcript* and complete the following statement:
My spouse could not use IRS Data Retrieval Tool because _____

____ My spouse 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

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 you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into your FAFSA.
2. If you are unable or choose not to use the Data Retrieval Tool, use the instructions below to request your 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
1(800)908-9946 <ul style="list-style-type: none"> • 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 	IRS.gov <u>Information Required:</u> <ul style="list-style-type: none"> • Social Security # • Date of Birth • Street address • Zip Code or Postal Code 	Complete Form 4506T-EZ <u>Mail to:</u> RAIVS Team Stop 37106 Fresno, CA 93888 <u>Fax:</u> (559)456-5876

**How to Request a Tax Account Transcript from the IRS for amended taxes		
Automated Phone System	On-Line	By Mail
1(800)908-9946 <ul style="list-style-type: none"> • Enter your Social Security # • Enter the Numbers in your street address • Option 4 (Transcript of Account/Transcript of Return) • Enter the year of the Return you are requesting 	IRS.gov <u>Information Required:</u> <ul style="list-style-type: none"> • Social Security # • Date of Birth • Street address • Zip Code or Postal Code 	Complete Form 4506-T <u>Mail to:</u> RAIVS Team Stop 37106 Fresno, CA 93888 <u>Fax:</u> (559)456-5876

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 or 309-298-2446 if you have questions.