



## Verification Worksheet

Your Student Aid Report (SAR) indicates that you have been selected for standard verification. You must submit a verification worksheet and provide IRS Income Verification to our office.

IRS Income Verification can be obtained in two different ways; one being the IRS Data Retrieval process through FAFSA (which is the quickest way to get your IRS Income Verification to us) or you can request a Tax Transcript through the IRS, which can be a lengthier process. Because of this difference in processing time, Wesleyan strongly recommends utilizing the IRS Data Retrieval option.

- Families with unusual circumstances, such as **Amended Tax Return Filers (1040X), Filing Extensions Filed (4868), Victims of IRS Identity Theft, and Filed Non-IRS Income Tax Returns** please read the instructions under **unusual circumstances (page 2) for directions in obtaining your IRS Income Verification.**

### Option 1- IRS Data Retrieval into FAFSA

In the event that you have filed your federal tax return electronically at least two to three weeks prior to today or submitted your paper return 8-11 weeks prior to today, you may be eligible to use the IRS Data Retrieval tool. This process will pull your prior year tax information directly into your FAFSA, which would fulfill the IRS Income Verification. **This does not replace the Federal 1040, 1040A, 1040EZ tax return requirement(s) for Wesleyan.** If you or your parents were not required to file a tax return, when completing the Verification Worksheet, please report this under Step 3 and/or 4.

Please visit [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and make a correction to your FAFSA.

- Please note recently widowed, separated, married filed separately, divorced parents that were required to file a joint return are NOT eligible to do the IRS Data Retrieval. In this case you will need to follow Option 2.*

### Option 2-Tax Transcripts

Families can opt to request a Tax Transcript from the IRS by calling the IRS or submitting a request through the mail. Use the Social Security Number and date of birth of the first person listed on the 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 income tax return). *If you filed an **amended tax** return with the IRS you are NOT eligible to do either the IRS Data Retrieval (Option 1) or request Tax Transcripts (Option 2) we will need a signed copy of your **1040X (Amended Tax Return)** to fulfill your IRS Income Verification Requirement.*

**To request a transcript through the automated telephone system**, call 800-908-9946. When ordering the tax transcript be sure to choose option #2 for a Return Transcript.

**To request a transcript through the mail**, visit [www.irs.gov](http://www.irs.gov) and click on "Form 4506-T." Submit this form to the IRS to retrieve the Tax Transcript. *If you choose this option you may request that the IRS send a copy of your Tax Transcript directly to a third-party.* You may list our school as a third party; our mailing address is Wesleyan Financial Aid Office, 237 High Street, Middletown, CT 06459.

*Please submit pages 3 & 4 of this Verification Worksheet, along with your Tax Transcripts (if applicable) to:  
Wesleyan University, Office of Financial Aid, 237 High Street, Middletown, CT 06459*

# Verification Worksheet

2016-2017

## IRS Income Tax Return Information for Individuals with Unusual Circumstances

**Amended Tax Return Filers (1040X).** If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following: A signed copy of the original 2015 IRS income tax return that was filed with the IRS or a **2015 IRS Tax Return Transcript** for the 2015 tax year; and a signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

**Filing Extension Filed (4868):** If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents: a copy of the IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2015; and a copy of IRS Form W-2 for each source of employment income received for tax year 2015 and, if self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2015.

**Victims of IRS Identity Theft:** A victim of IRS identity theft who has been unable to obtain a **2015 IRS Tax Return Transcript** or unable to use the IRS Data Retrieval Tool must provide a signed copy of the 2015 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit" if one was submitted to the IRS. If the individual did not keep a copy of Form 14039 or the IRS did not require him or her to submit one, he or she may provide one of the following: 1) a statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form; or 2) a copy of a police report if it was filed related to the IRS identify theft.

**Filed Non-IRS Income Tax Returns** If an individual filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, provide a signed copy of that 2015 income tax return(s).

*Please submit pages 3 & 4 of this Verification Worksheet, along with your Tax Transcripts (if applicable) to:  
Wesleyan University, Office of Financial Aid, 237 High Street, Middletown, CT 06459*

# Verification Worksheet

2016-2017

## STEP 1 – STUDENT INFORMATION

Last Name	First Name	Social Security Number	Student ID Number
Permanent Address	Street & Number	City/State/Zip	Date of Birth
Local Phone Number (Include Area Code)	Permanent Phone Number (Include Area Code)	Email Address	

## STEP 2 – FAMILY INFORMATION

If you are a **dependent student**, include:

- Yourself
- Your parent(s) (including step-parents)
- Your parent(s)' other dependent children if a) your parent(s) will provide more than half of their support from July 1, 2016 through June 30, 2017, or b) the children would be required to provide parental information when applying for Federal Student Aid
- Other people only if they now live in your parent(s)' household and your parents will provide more than half of their support from July 1, 2016 through June 30, 2017

If you are an **independent student**, include:

- Yourself
- Your spouse (if you are married)
- You or your spouse's children if you or your spouse will provide more than half of their support from July 1, 2016, through June 30, 2017, even if the children do not live with the you.
- Other people only if they live in your household and you provide more than half of their support and will continue to do so from July 1, 2016 through June 30, 2017

Full Name	Age	Relationship	Name of College/Degree (If at least half-time 2016-2017)
		Self	Wesleyan University/ Bachelors

**STEP 3 – STUDENT TAX TRANSCRIPT & INCOME INFORMATION – CALENDAR YEAR 2015**

Are you or will you be required to file a 2015 Federal Income Tax Return?

 **YES**...Attach a copy of a Federal Tax Transcript from the IRS or retrieve via FAFSA (IRS Data Retrieval), skip ahead to STEP 4. **NO**...Complete the table below and attach copies of ALL 2015 W-2 forms and continue to STEP 4.

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2015
<b>TOTAL</b>	

**STEP 4 – SPOUSE OR PARENT TAX TRANSCRIPTS & INCOME INFORMATION – CALENDAR YEAR 2015**

Are you or will you be required to file a 2015 Federal Income Tax Return?

 **YES**...Attach a copy of a Federal Tax Transcript from the IRS or retrieve via FAFSA (IRS Data Retrieval), skip ahead to STEP 5. **NO**...Complete the table below and copies of ALL 2015 W-2 forms and continue to STEP 5.

Source of Income (Fill out only if you did NOT file taxes)	Amount Earned in 2015
<b>TOTAL</b>	

**STEP 5 – FOOD STAMP BENEFITS (SNAP) – sometime during 2014 or 2015**

Were you or members of your household eligible to receive food stamps sometime during 2014 or 2015?

 **YES**...Continue to STEP 6 **NO**...Continue to STEP 6**STEP 6 – CHILD SUPPORT PAID – CALENDAR YEAR 2015**

Did a parent in your household that is listed on the FAFSA pay child support during the calendar year 2015? Or did you pay child support during the calendar year 2015? (Do not include support for children included in household size in STEP 2)

 **YES**...Complete the table below and continue to STEP 7. **NO**...Continue to STEP 7

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2015

**STEP 7 – CERTIFICATION: By signing this worksheet, I certify all the information reported is complete and correct:**

Student Signature	Date	Student Name (Please Print)	Wesleyan ID Number
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Parent Signature (IF student is dependent) / Spouse Signature (IF Student is married)	Date	Parent/Spouse Name (Please print)
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