



## Verification Worksheet

Your Student Aid Report (SAR) indicates that you have been selected for verification of federal financial aid eligibility. You must submit a verification worksheet and provide the required Income Verification or Verification of Non-filing documentation to our office.

### INSTRUCTIONS:

#### Verification Worksheet

Complete pages 3 and 4 of this document and return it to the financial aid office.

#### Income Verification

IRS Income Verification can be provided by submitting a copy of the 2015 IRS Tax Return Transcript. Married tax filers with separate returns must provide transcripts for both spouses. Tax transcripts are available from the IRS free of charge. You will need to provide identifying information including: tax filing status, Social Security Number and date of birth of the first person listed on the income tax return, and the address on file with the IRS (Typically this will be the address used on the 2015 income tax return). *Be sure to choose Return Transcript when selecting the transcript type.* More information is available at [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript).

#### Requesting IRS Tax Transcripts

- **To request an electronic transcript to print or download online:** Visit [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript) to register for immediate access to your tax transcript online. To protect your tax information, you will need to provide additional information to verify your identity.
- **To request a transcript delivered by mail:** There are three options for requesting a copy of your tax transcript be sent by mail. 1) Request a transcript by mail online at [www.irs.gov/individuals/get-transcript](http://www.irs.gov/individuals/get-transcript), 2) Call the transcript request automated phone system at 800-908-9946, or 3) Submit Form 4506-T (available at [www.irs.gov](http://www.irs.gov)) to the IRS by mail or fax. *If you choose this option you may request that the IRS send your Tax Transcript directly to the Wesleyan Financial Aid Office as a third party. However, we recommend that you also have a copy for your own records.*

Families with unusual circumstances may be required to provide alternative documentation for income verification. Refer to *Verification of Income Information for Individuals with Unusual Circumstances* on page 2 for additional instructions for the following situations:

- *Filers of Amended Tax Returns (Form 1040X)*
- *IRS Tax Extension Granted (Form 4868)*
- *Victims of IRS Tax-Related Identity Theft*
- *Filers of Non-IRS Income Tax Returns*

# Verification Worksheet

2017-18

## Verification of Non-filing

An individual who did not file a 2015 income tax return with the IRS must provide a Verification of Non-filing Letter from the IRS or other relevant tax authority dated on or after October 1, 2016.

- **To request an IRS Verification of Non-filing Letter:** Follow the instructions provided above for Option 2-IRS Tax Transcripts, choosing Verification of Non-filing when selecting the transcript type.

*Non-filers must also complete the applicable sections of the Verification Worksheet.*

## Verification of Income Information for Individuals with Unusual Circumstances

### **Amended IRS Income Tax Returns**

An individual who filed an amended IRS income tax return for tax year 2015 must provide:

- A 2015 Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A signed copy of the 2015 IRS Form 1040X (Amended U.S. Individual Tax Return) that was filed with the IRS.

### **Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft who cannot use the IRS Data Retrieval Tool or get a tax return transcript must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax related identity theft and that the IRS is aware of the tax-related identity theft.

### **Non-IRS Income Tax Returns**

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico or the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. Please note: the tax filer may be required to provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority

**Submit pages 3 & 4 of this Verification Worksheet and applicable income verification documents to:**

**Wesleyan University  
Office of Financial Aid  
237 High Street  
Middletown, CT 06459  
finaid@wesleyan.edu**

**NOTE: IRS Income Verification does not replace Wesleyan's federal tax return (1040, 1040A, 1040EZ) requirement(s).**

# Verification Worksheet

2017-18

## 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 – HOUSEHOLD MEMBERS

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

- Yourself
- Your parent(s)\* (including step-parents)
- Your parent(s)' other dependent children if: your parent(s) will provide more than half of their support from July 1, 2017, through June 30, 2018, **OR** the children would be required to provide parental information when completing a FAFSA for 2017-2018 to apply 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, 2017, through June 30, 2018

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, 2017, through June 30, 2018, 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, 2017, through June 30, 2018

\*See "[Who is considered a parent?](#)" in the [FAFSA Help](#) section at <https://fafsa.ed.gov/> for more information.

Full Name	Age	Relationship	Will be enrolled in college/university at least half time in 2017-18 (Yes or No)	Name of College/Degree (If at least half-time 2017-18)
		Self	Yes	Wesleyan University/ Bachelors

**STEP 3 – STUDENT 2015 TAX FILING & INCOME INFORMATION**

Were you required to file a 2015 Federal Income Tax Return?

**YES** and I have attached a copy of the 2015 IRS Tax Transcript/Income Verification (See instructions on pages 1-2). Continue to STEP 4.

**NO**. Complete the table below for all income earned from work in 2015. Attach copies of **all** 2015 W-2 forms **and** the 2015 IRS Verification of Non-filing Letter (See instructions on pages 1-2). Continue to STEP 4.

<b>Employer</b> <b>(Fill out only if you did NOT file taxes)</b>	<b>IRS W-2 Form Provided</b> <b>(Yes or No)</b>	<b>Amount Earned</b> <b>in 2015</b>
<b>Total 2015 Income From Work:</b>		

**STEP 4 –SPOUSE OR PARENT 2015 TAX FILING & INCOME INFORMATION**

Were you required to file a 2015 Federal Income Tax Return?

**YES** and I have attached a copy of the 2015 IRS Tax Transcript/Income Verification (See instructions on pages 1-2). If there was a change in marital status after December 31, 2015, please notify the financial aid office. Continue to STEP 5.

**NO**. Complete the table below for all income earned from work in 2015. Attach copies of **all** 2015 W-2 forms **and** the 2015 IRS Verification of Non-filing Letter (See instructions on pages 1-2). Continue to STEP 5.

<b>Employer</b> <b>(Fill out only if you did NOT file taxes)</b>	<b>IRS W-2 Form Provided</b> <b>(Yes or No)</b>	<b>Amount Earned</b> <b>in 2015</b>
<b>Total 2015 Income From Work:</b>		

**STEP 5 – CERTIFICATION:** By signing this worksheet, I certify that all information reported is complete and correct:

\_\_\_\_\_  
*Student Signature*    *Date*    *Student Name (Please Print)*    *Wesleyan ID Number*

\_\_\_\_\_  
*Parent Signature (IF student is dependent) / Spouse Signature (IF Student is married)*    *Date*    *Parent/Spouse Name (Please print)*