

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Instructions: Complete this section if the student and spouse filed or will file a 2016 income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov.* In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Check 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 tax return information into the student's FAFSA.
- The student has not yet used the IRS Data Retrieval Tool in *FAFSA on the Web*, but will use the tool to retrieve and transfer 2016 IRS income tax return information into the student's FAFSA.
- The student is unable or chooses not to use the IRS Data Retrieval Tool in *FAFSA on the Web*, and instead the student will provide the school with a **2016 IRS tax return transcript**.

A 2016 IRS Tax Return Transcript may be obtained though:

- **Get Transcript by MAIL** – Go to www.irs.gov, under the Tools heading, click “Get a tax transcript.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.” The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript ONLINE** – Go to www.irs.gov, under the Tools heading, click “Get a tax transcript.” Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506 –T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the **2016 IRS Tax Return Transcript(s)** must be provided for each

- Check here if a **2016 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2016 IRS Tax Return Transcript(s)** will be provided later.

2. TAX RETURN NONFILERS

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2016 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2016.
- The student and/or spouse were employed in 2016 and have listed below the names of all the student's employers, the amount earned from each employer in 2016, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2016 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Continue to the next page.

If more space is needed, attach a separate page with the student's name and ID Number at the top.

<u>Employer's Name</u>	<u>IRS W-2 Provided?</u>	<u>Annual Amount Earned in 2016</u>
(Example) ABC's Auto Body Shop	Yes	\$4,500
Total amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

D. Dependent Student's Parent's Income Information to Be Verified

1. TAX RETURN FILERS—Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

Instructions: Complete this section if the parents filed or will file a 2016 income tax return (s). *The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2016 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.*

Check the box that applies:

- The parents have used the IRS Data Retrieval Tool in *FAFSA on the Web* to retrieve and transfer 2016 IRS income information into the student's FAFSA.
- The parents have not yet used the IRS DRT in *FAFSA on the Web*, but will use the tool to retrieve and transfer 2016 IRS income information into the student's FAFSA.
- The parents are unable or choose not to use the IRS DRT in *FAFSA on the Web*, and the parents will provide the school with a **2016 IRS tax return transcript**.

A 2016 IRS Tax Return Transcript may be obtained though:

- **Get Transcript by MAIL** – Go to www.irs.gov, under the Tools heading, click “Get a tax transcript.” Click “Get Transcript by MAIL.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.” The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript ONLINE** – Go to www.irs.gov, under the Tools heading, click “Get a tax transcript.” Click “Get Transcript ONLINE.” Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a test-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506 –T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and a **2016 IRS Tax Return Transcript(s)** must be provided for each.

- Check here if a **2016 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2016 IRS Tax Return Transcript(s)** will be provided later.

2. TAX RETURN NONFILERS

The instructions and certifications below apply to the each parent included in the household. Complete this section if the parents will not file and are not required to file a 2016 income tax return with the IRS.

Check the box that applies:

- Neither parent was employed, and neither had income earned from work in 2016.
- One or both parents were employed in 2016 and have listed below the names of all employers, the amount earned from each employer in 2016, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2016 IRS W-2 forms issued to the parents by their employers]. 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 the student's name and ID Number at the top.

<u>Employer's Name</u>	<u>IRS W-2 Provided?</u>	<u>Annual Amount Earned in 2016</u>
<i>(Example) ABC's Auto Body Shop</i>	Yes	\$4,500
Total amount of Income Earned From Work		\$

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

E. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

Print Student's Name

Student's ID Number

Student's Signature

Date

Parent's Signature

Date

Do not mail this worksheet to the U.S. Department of Education. Fax this form to (334) 347-0191 or mail to: ESCC Financial Aid, P.O. Box 1300, Enterprise, AL 36331-1300. Aviation students should fax this form to (334) 774-0477 or mail to: ESCC-AAC Financial Aid, 3405 South US Hwy 231, Ozark, AL 36360.

Please make a copy of this worksheet for your records.