

2015-2016 INDEPENDENT STUDENT VERIFICATION INSTRUCTIONS

Your application has been selected for review in a process called "Verification." In this process, we will compare information on this form and any other required documents with your FAFSA information. The law says that we have the right to ask you for this information before awarding federal aid. If there are any differences between your application information and your financial documents, we will submit the correct information to the Central Processing Servicing Center on your behalf.

Mellencamp Hall, Room 162
P.O. Box 469
Milwaukee, WI
53201-0469
414 229-4541 phone
414 229-5699 fax
www4.uwm.edu/financialaid
finaid@uwm.edu

You will need to:

1. Provide required tax information.
2. **Print, complete, sign and return pages 1 and 2 of this form, Independent Verification Worksheet.** You must provide a signature in section E. Worksheets with unanswered questions will be considered incomplete and unacceptable. Incomplete worksheets will delay processing.

2015-2016 INDEPENDENT STUDENT VERIFICATION WORKSHEET (V010C)

A. STUDENT INFORMATION

Last Name	First Name	M.I.	Student ID #
Address (include apt. no.)		Email address	Birthdate (mmddyyyy)
City	State	ZIP Code	Phone Number (include area code)

B. FAMILY INFORMATION

• **List yourself below:**

Full Name	Age	College
		UW-Milwaukee

- **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, 2015 and June 30, 2016 and will be enrolled in a degree or certificate program.

Full Name	Age	Name of College in 2015-2016

Read Carefully:

- **Include other people only if** they now live with you and get more than half of their support from you and will continue to get this support from July 1, 2015 through June 30, 2016.
- **Write in the name of the college for those who will be attending college at least half-time** between July 1, 2015 and June 30, 2016 and will be enrolled in a degree or certificate program at an eligible postsecondary educational institution.
- **List your children below if** you will provide more than half of their support from July 1, 2015 through June 30, 2016, even if they do not live with you. Do not include foster children.

******If you need more space, attach a separate page******

Full Name	Age	Relationship to Student	Name of College in 2015-2016
<i>Example: Michelle Smith</i>	<i>9</i>	<i>Daughter</i>	<i>N/A</i>

6. If you or your spouse has children not listed earlier as part of the household that you paid child support for due to a legal requirement in 2014, please complete this section. Enter N/A if not applicable.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support was Paid	Age of Child	Amount of Child Support Paid in 2014

C. ADDITIONAL INFORMATION *(All applicants)*

Did anyone in Section B (questions 1-5) of this worksheet receive SNAP (formerly known as food stamps) benefits in 2013 or 2014? You may be asked to provide documentation.

↑ **Yes** ↑ **No**

D. STUDENT and SPOUSE TAX TRANSCRIPT AND INCOME INFORMATION *(All applicants)*

Check **only one** box below for both student and spouse columns. Tax transcripts include the 2014 IRS transcript from filing Forms 1040, 1040A, and 1040EZ.

Student

I have used the IRS Data Retrieval Tool, transferred my data, and have not changed any IRS data. (Refer to Attachment A for more information on this option, as not everyone is eligible to use this tool.)

I have enclosed a copy of my 2014 Federal Tax Return Transcript. To request a free tax return transcript for tax year 2014 from the IRS, either go to <http://www.irs.gov/Individuals/Get-Transcript> or call 1-800-908-9946(See Attachment B for detailed instructions.)

If you filed an amended return, have an extension, filed a foreign tax return, or cannot obtain a tax transcript due to IRS identity theft, please review Attachment C: Unusual Tax Filing Situations

OR

I did not and am not required to file a 2014 Federal Income Tax Return. I have listed below other income sources and amounts for 2014. **You must enclose all W-2 forms from your employers.**

Spouse

Employee's Name	Employer's Name	2014 Income	IRS W-2 Attached?
		\$	
		\$	
		\$	

E. SIGN THIS WORKSHEET: *(Requires student signature)*

For the PELL Grant program only, verification materials must be submitted no later than 120 days after the last day you attend, or September 26, 2016, whichever is earlier. For all other programs, verification materials must be submitted no later than your last date of attendance. A loan cannot be offered to you after your last date of attendance. It can take up to 8 weeks for your file to be reviewed for eligibility, please plan accordingly.

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, be sentenced to jail, or both.

Student _____ Date _____

Spouse _____ Date _____

Return all required verification documents to the Department of Financial Aid, Student Employment and Military Education Benefits (fax, email and physical address can be found at the top of page 1).

Attachment A: How to Use the IRS Data Retrieval Tool (DRT) via the FAFSA

IRS Data Retrieval Tool (DRT)

When completing a 2015-2016 FAFSA, students and spouse if married may use the Internal Revenue Service (IRS) Data Retrieval Tool to import federal income tax information directly from the IRS into the FAFSA. This option is built into the online FAFSA application process.

NOTE: Please allow approximately 2-3 weeks from the date your electronically-filed federal tax return is accepted by the IRS to use the IRS Data Retrieval Tool via the FAFSA. If you filed a paper tax return, please allow 8-11 weeks for processing by the IRS.

Eligibility to Use IRS Data Retrieval Tool (DRT)

Students are eligible to use the FAFSA's IRS Data Retrieval Tool if they:

- filed 2014 federal tax return with the IRS.
- filed with tax filing statuses of "Married" "Filing Jointly" or "Single."
- have a valid Social Security Number.
- have a [Federal Student Aid PIN](#) (a PIN may be acquired as part of the process).

Students are not eligible to use the IRS Data Retrieval Tool if:

- the home address on the FAFSA does not match the address on the tax return.
- marital status changed after December 31, 2014.
- tax filing status is "Married, Filing Separately."
- reported on the FAFSA that marital status is married, but tax filing status is "Head of Household."
- filed an Amended Tax Return.
- filed a Puerto Rican or foreign tax return.
- filed a tax return using a Tax ID Number (TIN).
- did not or will not file a federal tax return.

Correcting a processed FAFSA to utilize the IRS Data Retrieval Tool

Those who filed a FAFSA prior to February 15 (before the DRT was available), and those who file federal taxes after the FAFSA has been submitted, may still take advantage of the IRS Data Retrieval Tool. You should access the IRS Data Retrieval Tool via the online "Correct your FAFSA" process at www.fafsa.gov. After you have done so, UWM will receive an updated copy of the student's FAFSA reflecting the income information you retrieved directly from the IRS.

- Go to www.fafsa.gov, log in, and click on "Make FAFSA Corrections."
- Go to the "Student Financial Information" screen.
 - Under the IRS Data Retrieval section, enter the student's federal aid [PIN](#) and click on "Link to IRS."
 - Enter the address and tax filing status exactly as it appears on the student's tax form. Click on "Submit."
 - Review the tax information but DO NOT change any data at any point or it will not be considered "retrieved data." Select "Transfer My Tax Information into the FAFSA" and click on "Transfer Now."
 - A message will confirm that the information was transferred.

Benefits of using the FAFSA's IRS Data Retrieval Tool:

Aid applicants selected for Verification are required to submit federal income tax information to the Financial Aid Department. Students who use the IRS Data Retrieval Tool, and do not change the income information in any way on the FAFSA, will not usually be required to submit Tax Return Transcripts to the school, reducing the number of documents required if selected for Verification.

Attachment B: How to Request a Tax Transcript

2014 Tax Return Transcripts

The Financial Aid Department must collect a Federal Tax Return Transcript for anyone selected for Verification who did not use the IRS Data Retrieval Tool on the FAFSA, was ineligible to use the Tool, or if the data from the IRS was changed.

- Students who are married but filing separately must submit 2 separate IRS transcripts.
- Tax filers are strongly encouraged to keep a copy of Tax Return Transcripts obtained from the IRS should they need copies in the future.

The IRS will provide a Tax Return Transcript free for any tax filer. Be sure to order a **Tax Return Transcript** because this is free. Requesting an actual copy of a tax return will cost money.

To obtain a Tax Return Transcript online, please follow these steps:

- Go to <http://www.irs.gov/Individuals/Get-Transcript>
- Choose "Get Transcript Online" (recommended – you are able to view and print your transcript immediately) or "Get Transcript by Mail"
- Select Create an Account
 - Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file
- Once account successfully set up, select "Higher Education/Student Aid" as the reason for requesting a transcript
- Select "Return Transcript" for "2014".
- Your requested transcript will open in new window. You should print a copy to submit to the Financial Aid Department, and make or print an additional copy for your own records.
- If you selected "Get a Transcript by Mail," you can expect a return be sent the address listed on the return about 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.

To obtain a Tax Return Transcript by phone, please follow these steps:

- Call the IRS at 1-800-908-9946 (7:00 a.m. to 7:00 p.m.).
- Tax filers must follow prompts to enter their Social Security Number and the numbers of their street address. Generally, these will be the numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select "Option 2" to request an IRS Tax Return Transcript, and then enter "2014."
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request within 5 to 10 days from the time the IRS receives the request.
- Once received, keep original and submit a copy to the Financial Aid Department.

IRS2Go App (2 options):

- Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8>
- Google Play at <https://play.google.com/store/apps/details?id=gov.irs>

Paper Request Form:

- Complete IRS Form 4506T-EZ or IRS Form 4506-T

Attachment C: Unusual Tax Filing Situations

For Individuals Granted a Filing Extension by the IRS

If you had an extension and have since filed your taxes, you must either provide a tax return transcript or use the IRS Data Retrieval Tool on the FAFSA. If an individual is required to file a 2014 IRS federal 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 2014; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 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 2014.

For Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS federal income tax return for tax year 2014, provide both items:

- **2014 IRS Tax Return Transcript** (signature not required); and
- A **signed** copy of the 2014 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

For Individuals Who Were Victims of IRS Identity Theft

- A copy of the **Tax Return Database View** (TRDBV) transcript for 2014

Note: A victim of IRS identify theft must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the required tax filer's 2014 IRS income tax return information (TRDBV).

- A **signed and dated statement** indicating you were a victim of IRS tax-related identity theft and that the IRS has been made aware of the tax-related identity theft.

Example: I, *(insert your name)*, was a victim of IRS tax-related identity theft and the IRS has been made aware of this tax-related identity theft. (Signed and dated).

Verification of 2014 Income Tax Return Information for Individuals Who Filed Non-IRS Income Tax Returns

If an individual filed or will file a 2014 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 2014 income tax return(s).