



STUDENT NAME: \_\_\_\_\_  
 WIN: \_\_\_\_\_  
 DAYTIME PHONE: \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_  
 CITY, STATE, ZIP: \_\_\_\_\_

**WMU Student Financial Aid**  
 1903 W Michigan Ave  
 Kalamazoo MI 49008-5337  
 (269) 387-6000  
 finaid-info@wmich.edu

## 2017-18 DEPENDENT HOUSEHOLD VERIFICATION WORKSHEET

Your application was selected for review in a process called "Verification". WMU will verify information from your Student Aid Report (SAR). If there are differences between your application and your financial documents, we will make corrections that may result in an increase or decrease in your eligibility for financial aid programs.

### A. Family Information

List the people in the parent's household, including:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
- Your parents' other children, even if they don't live with your parent(s), if
  - a) your parents will provide more than half of the children's support from July 1, 2017, through June 30, 2018, or
  - b) the children would be required to provide parental information if they were completing a FAFSA for 2017-18.
 Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with your parents, and your parents provide more than half of their support, and will continue to provide more than half of that person's support through June 30, 2018.

**Write the names of all household members in the space(s) below.** Number in College: Include in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2017, and June 30, 2018, include the name of the college.

FULL NAME	AGE	RELATIONSHIP	COLLEGE	ENROLLED AT LEAST HALF TIME?
		Self	Western Michigan University	

**Note:** We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

**B. Income Verification**

Complete this section if you, the student and/or your spouse filed a 2015 income tax return with the IRS. As part of verification, the Financial Aid Office is required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT) or via an IRS Tax Return Transcript. A copy of your Tax Return (1040, 1040A, or 1040EZ) is NOT acceptable for verification purposes.

**You MUST complete one of the steps outline in the chart below.**

STUDENT must select one	PARENT(s) must select one
<input type="checkbox"/> I have successfully used the FAFSA's IRS Data Retrieval Tool to load my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction.	<input type="checkbox"/> I/We have successfully used the FAFSA's IRS Data Retrieval Tool to load my (and my spouse's) income information onto the FAFSA and submitted the FAFSA transaction.
<input type="checkbox"/> I have not yet, but will use the FAFSA's Data Retrieval Tool (instructions on last page) to transfer my (and my spouse's) income information onto the FAFSA. (please note verification cannot be completed until this information is received). <b>Currently unavailable</b>	<input type="checkbox"/> I/We have not yet, but will use the FAFSA's Data Retrieval Tool (instructions on last page) to transfer my (and my spouse's) income information onto the FAFSA. (please note verification cannot be completed until this information is received). <b>Currently unavailable</b>
<input type="checkbox"/> I am unable or chose not to use the FAFSA's Data Retrieval Tool to transfer my income information. I have either attached a copy of my Tax Return Transcript here, or I have attached a signed paper copy of my 2015 IRS Tax Return.	<input type="checkbox"/> I/We am unable or chose not to use the FAFSA's Data Retrieval Tool to transfer my income information. I have either attached a copy of my Tax Return Transcript here, or I have attached a signed paper copy of my 2015 IRS Tax Return.
<input type="checkbox"/> I filed an Amended IRS Income Tax Return, I was Granted a Filing Extension by the IRS, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. (Instructions on last page)	<input type="checkbox"/> I/We filed an Amended IRS Income Tax Return, I was Granted a Filing Extension by the IRS, I was a victim of IRS Identity Theft, or I filed a Non-IRS Income Tax Return. (Instructions on last page)
I, the student, did not and am not required to file the 2015 Federal Income Tax Return. I, the student, <input type="checkbox"/> was not employed in 2015 <input type="checkbox"/> was employed in 2015	I/We, the parent(s), did not and am not required to file a 2015 Federal Tax Return. I/We, the parent(s) <input type="checkbox"/> was not employed in 2015 <input type="checkbox"/> was employed in 2015

If you, the non-tax filer, were employed and earned less than the required minimum amount to file federal taxes, per IRS guidelines, then you must provide a W-2, and complete the chart below.

**Complete the chart below for each non-filer.**

SOURCE OF INCOME FROM WORK 2015	NAME OF INCOME EARNER	RELATIONSHIP (STUDENT OR PARENT)	2015 TOTAL AMOUNT EARNED	W-2 ATTACHED?
<i>Suzy's Auto Body Shop (example)</i>	<i>Bob Smith</i>	<i>Father</i>	<i>\$2,000.00</i>	<i>Yes</i>

**Note:** We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

**STUDENT NAME:** \_\_\_\_\_ **WIN:** \_\_\_\_\_

**REQUIRED SIGNATURES**

By signing this worksheet, I certify that all the information reported on it is complete and correct. I understand that purposely giving false or misleading information regarding eligibility for Federal or State aid may result in fines, jail terms or both. I will provide any additional documentation required.

**PARENT SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**STUDENT SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**Return your completed form to Bronco Express on the lower level of the Bernhard Center. You may also email or mail to the address above. Be sure to include your name and WIN on all pages. Missing information may delay the processing of financial aid.**

## **INSTRUCTIONS ON OBTAINING DOCUMENTATION, AND INCOME INFORMATION FOR INDIVIDUALS WITH UNUSUAL CIRCUMSTANCES**

### **If you FILED TAXES:**

**Option 1** - *Verify income by using the IRS Data Retrieval Tool that is part of FAFSA on the web at FAFSA.ed.gov. Currently Unavailable.*

**Option 2** - Tax filers who are unable or choose not to use the IRS DRT in FAFSA on the Web, instead will provide the school a 2015 Tax Return Transcript(s), or a signed paper copy of their 2015 IRS Tax Return. A 2015 IRS Tax Return Transcript may be obtained through:

- Online Request - Go to IRS.gov, under the Tools heading on the IRS homepage, 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."
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

**Note:** Make sure you order the "IRS Tax Return Transcript" and not the "IRS Tax Account Transcript." Use the Social Security Number and date of birth of the first person listed on the tax return, and the address on file with the IRS. It takes up to 2-3 weeks for IRS income information to be available for the IRS DRT for electronic IRS tax return filers, and 8-11 weeks for paper IRS tax return filers. If the parents filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and the 2015 IRS Tax Return Transcript(s) must be provided for each.

### **If you DID NOT FILE TAXES:**

A Verification of Non-Filing Letter can be obtained by the IRS through:

- Online Request - Go to IRS.gov, under the Tools heading on the IRS homepage, click "Get a Tax Transcript" Choose "Verification of Non-Filing Letter" option.
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506-T and check box 7

### **UNUSUAL CIRCUMSTANCES:**

Individuals Granted a Filing Extension by the IRS must provide:

- A Verification of Non-Filing Letter;
- A copy of 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;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time 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 Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2015.

Individuals Who Filed an Amended IRS Income Tax Return for tax year 2015 must provide:

- A 2015 IRS 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; or a signed paper copy of their 2015 IRS Tax Return; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Tax Return that was filed with the IRS.

Individuals who were Victims of IRS Tax-Related Identity Theft 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.

Individuals Who Filed Non-IRS Income Tax Returns

An individual who file or will file a 2015 income tax return with the relevant authority of a U.S. territory, commonwealth, or with a foreign central government must provide:

- A transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2015; or
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2015 income tax return(s).