



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 INDEPENDENT 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 student's household, including:

- Yourself and your spouse, if you are married, and
- Your children, if you will provide more than half of their support from July 1, 2017 through June 30, 2018 even if they do not live with you, and
- Other people if they now live with you, and you (or your spouse) provides more than half of the other person's 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 outlined in the chart below.**

___	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.																								
___	I have not yet, but will use the FAFSA's Data Retrieval Tool (instructions below) to transfer my (and my spouse's) income information onto the FAFSA. (please note verification cannot be completed until this information is received) Currently unavailable.																								
___	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.																								
___	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. I will contact the Financial Aid Office for detailed instructions on how to complete verification.																								
___	<p>I the student (and/or spouse if applicable), did not and am not required to file a 2015 Federal Income Tax Return. Please select one:</p> <p>___ The student (and spouse) were not employed and had no income earned from work in 2015.</p> <p>___ The student and/or spouse were employed in 2015 and have listed below the names of all employers, the amount earned from each employer in 2015 and whether an IRS W-2 is provided.</p> <p>If you, the non-tax filer, was 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. (Provide copies of all 2015 IRS W-2 forms issued to you, and spouse if married). List every employer even if the employer did not issue an IRS W-2.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 35%;">Source of Income from work in 2015</th> <th style="width: 15%;">Student</th> <th style="width: 15%;">Spouse</th> <th style="width: 35%;">IRS W-2 or 1099 attached?</th> </tr> </thead> <tbody> <tr> <td> </td> <td style="text-align: center;">\$</td> <td style="text-align: center;">\$</td> <td> </td> </tr> <tr> <td> </td> <td style="text-align: center;">\$</td> <td style="text-align: center;">\$</td> <td> </td> </tr> <tr> <td> </td> <td style="text-align: center;">\$</td> <td style="text-align: center;">\$</td> <td> </td> </tr> <tr> <td> </td> <td style="text-align: center;">\$</td> <td style="text-align: center;">\$</td> <td> </td> </tr> <tr> <td>Total Income from work in 2015:</td> <td style="text-align: center;">\$</td> <td style="text-align: center;">\$</td> <td> </td> </tr> </tbody> </table> <p>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.</p>	Source of Income from work in 2015	Student	Spouse	IRS W-2 or 1099 attached?		\$	\$			\$	\$			\$	\$			\$	\$		Total Income from work in 2015:	\$	\$	
Source of Income from work in 2015	Student	Spouse	IRS W-2 or 1099 attached?																						
	\$	\$																							
	\$	\$																							
	\$	\$																							
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Total Income from work in 2015:	\$	\$																							

REQUIRED SIGNATURE

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.

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).