



## 2017-18 STUDENT TAX STATEMENT WORKSHEET

### **If you (and spouse, if married) have filed a tax return**

**Important Note:** The instructions below apply to the student, and spouse, if the student is married.

**Instructions:** Complete this section if the student filed or will file a 2015 IRS 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.ed.gov.*

In most cases, no further documentation is needed to verify 2015 income information that was transferred into your FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Parent, please complete one of the two options listed below:

**Option 1** – You may use the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the web at FAFSA.ed.gov. \*

**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 IRS 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 [www.irs.gov](http://www.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.

\* For individuals selected for verification who have special circumstances, see the last page.



**NOTE:** If you have, or will file a tax return, you do not need to submit this form. Please complete Option 1 or 2, and we will review the information.

However - if you are not required to file a tax return, please continue to the second page.



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 STUDENT TAX STATEMENT WORKSHEET**

**If you (and spouse, if married) are not required to file a tax return**

Please select reason why you have not yet filed:

- I have filed an extension – see the next page for further information.
  - I am filing a non-US tax return – see the next page for further information.
  - I am not required to file because my income is below the IRS guidelines for being required to file a 2015 Federal IRS Tax Return – please complete the steps below:
    - The student and spouse were not employed and had no income earned from work in 2015.
    - 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 form is provided. [Provide copies of all 2015 IRS W-2 forms issued to you, and spouse if married, by your employers]. List every employer even if the employer did not issue an IRS W-2 form.
- If more space is needed, provide a separate page with the student’s name and WIN number at the top.

EMPLOYERS NAME	IRS W-2 PROVIDED?	ANNUAL AMOUNT EARNED IN 2015
<i>(EXAMPLE) ABC'S AUTO BODY SHOP</i>	<i>YES</i>	<i>\$4,500.00</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.

**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 VERIFICATION OF 2015 INCOME INFORMATION FOR INDIVIDUALS WITH UNUSUAL CIRCUMSTANCES**

### **UNUSUAL CIRCUMSTANCES:**

Individuals Granted a Filing Extension by the IRS must provide:

- 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).