



WESTERN MICHIGAN
UNIVERSITY

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

2018-19 INDEPENDENT HOUSEHOLD VERIFICATION WORKSHEET

A. Number of Household Members: List below the people in the student's household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children or your spouse's children if you are married, If you will provide more than half of the children's support from July 1, 2018 through June 30, 2019, even if a child does not live with you.
- Other people if they now live with you and you provide more than half of their support, and will continue to provide more than half of that person's support through June 30, 2019.

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 post secondary educational institution anytime between July, 2018 through June 30, 2019. 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 for Tax Filers

Complete this section if you, the student and your spouse, if married, filed a 2016 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.

You MUST complete one of the steps outlined in the chart below.

STUDENT must select one	STUDENT'S SPOUSE (if married) must select one
<input type="checkbox"/> I have successfully used the FAFSA's IRS Data Retrieval Tool to load my income information onto the FAFSA and submitted the FAFSA transaction.	<input type="checkbox"/> My spouse has successfully used the FAFSA's IRS Data Retrieval Tool to load 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).	<input type="checkbox"/> My spouse and I have not yet, but will use the FAFSA's Data Retrieval Tool (instructions on last page) to transfer income information onto the FAFSA. (please note verification cannot be completed until this information is received)
<input type="checkbox"/> I am unable or chose not to use the FAFSA's Data Retrieval Tool to transfer my income information and instead will provide a 2016 IRS Tax Return Transcript. (instructions below) <input type="checkbox"/> Check here if 2016 IRS Tax Return Transcript(s) is provided. <input type="checkbox"/> Check here if 2016 IRS Tax Return Transcript(s) will be provided later. <input type="checkbox"/> Check here if 2016 IRS Federal Income Tax Return (signed copies of the Form 1040, 1040A, 1040EZ front and back) is provided.	<input type="checkbox"/> My spouse was unable or chose not to use the FAFSA's Data Retrieval Tool to transfer income information and instead will provide a 2016 IRS Tax Return Transcript. (instructions below) <input type="checkbox"/> Check here if 2016 IRS Tax Return Transcript(s) is provided. <input type="checkbox"/> Check here if 2016 IRS Tax Return Transcript(s) will be provided later. <input type="checkbox"/> Check here if 2016 IRS Federal Income Tax Return (signed copies of the Form 1040, 1040A, 1040EZ front and back) is provided.
<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"/> My spouse filed an Amended IRS Income Tax Return, was Granted a Filing Extension by the IRS, was a victim of IRS Identity Theft, or filed a Non-IRS Income Tax Return. (Instructions on last page)
<input type="checkbox"/> I, the student, did not and am not required to file the 2016 Federal Income Tax Return. If non-tax filer, please complete Section C.	<input type="checkbox"/> My spouse did not and is not required to file a 2016 Federal Income Tax Return. Please complete Section C.

If you FILED TAXES:

Option 1 - 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.

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 2016 Tax Return Transcript(s), or a signed paper copy of their 2016 IRS Tax Return. A 2016 IRS Tax Return Transcript may be obtained through:

- **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.

STUDENT NAME: _____ WIN: _____

REQUIRED SIGNATURES For Tax Filers

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.

C. Income Verification for Non-Tax Filers

The instructions and certifications below apply if either you, the student, and/or your spouse, if you are married, who did NOT file and are NOT required to file a 2016 Income Tax Return with the IRS.

STEP 1 - Identification of non-tax filer(s)

___ I, the student, did not and am not required to file the 2016 Federal Income Tax Return.

___ I was not employed in 2016.

___ I was employed in 2016 (complete chart below).

___ I am the spouse of the above student, am listed on the 2018-19 FAFSA, did not and am not required to file a 2016 Federal Income Tax Return. Name of spouse: _____

___ I was not employed in 2016.

___ I was employed in 2016 (complete chart below).

STEP 2 - Employment

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.

SOURCE OF INCOME FROM WORK 2016	NAME OF INCOME EARNER	RELATIONSHIP (STUDENT OR PARENT)	2016 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>

STUDENT NAME: _____ **WIN:** _____

STEP 3 – Verification of non-tax filing

For each non-tax filer, please provide documentation from the IRS or other relevant tax authority dated on or after Oct. 1, 2017 that indicates a 2016 IRS Income Tax Return was NOT filed with the IRS or other relevant tax authority. A verification of Non-Filing Letter can be obtained from the IRS. (instructions on last page)

Check here if IRS Verification of Non-Filing is provided.

Check here if IRS Verification of Non-Filing will be provided later.

I was unable to obtain the IRS verification of Non-Filing. I certify that I have attempted to obtain the IRS Verification of Non-Filing but was unable. Also indicate here the reason that you were not able to obtain the Verification of Non-Filing:

REQUIRED SIGNATURES For Non Tax Filers

By signing this worksheet, I certify that I have not filed and am not required to file a 2016 Federal Income Tax Return.

I also 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:** _____

SPOUSE 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 DID NOT FILE TAXES:

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

- Online Request - Go to www.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 2016;
- 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 2016; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2016 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 2016.

Individuals Who Filed an Amended IRS Income Tax Return for tax year 2016 must provide:

- A signed copy of the 2016 IRS Form 1040X, "Amended U.S. Individual Tax Return that was filed with the IRS, AND
- **Either** 1) the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.ed.gov; OR 2) a 2016 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.

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 2016 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 2016; or
- If a transcript cannot be obtained at no cost from the relevant taxing authority, a signed copy of the 2016 income tax return(s).