

A. Verification of 2017 Income Information for Parent Tax Filers

A. TAX RETURN FILERS - Apply to each parent in the household. Complete this section if your parent(s) filed or will file a 2017 Income Tax Return with the IRS.

- 1. The parents **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2017 IRS income tax return information into the student's FAFSA. *The Grambling State University Financial Aid Office will use the IRS information that was transferred in the verification process.*
- 2. The parents are **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2017 IRS Tax Return Transcript(s)**. Signature is not required. *To obtain a 2017 IRS Tax Return Transcript, go to www.irs.gov, under the Tools heading click "Get a Tax Transcript", or call 1-800-908-9946.*
- 3. The parents are required to file a 2017 IRS income tax return and have been **granted a filing extension** by the IRS. The parents will provide the following documents:
 - a. 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 2017; and
 - b. A copy of the IRS's approval of an extension beyond the automatic six-month extension for year 2017; and
 - c. A copy of IRS Form W-2 for each source of employment income received for tax year 2017 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 2017.
- 4. The parents have **filed an amended** IRS income tax return for tax year 2017. The parents will provide the following documents:
 - a. A **2017 IRS Tax Return Transcript** (that will only include information from the original tax return & 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; and
 - b. A signed copy of the 2017 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS.
- 5. The parents are a **victim of identity theft** and have been unable to obtain a **2017 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. The parents will provide the following documents:
 - a. 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**
 - b. 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.
- 6. Parent(s) are an individual **who filed or will file a 2017 income tax return with the relevant taxing authority of a U.S. territory, commonwealth**, (e.g., Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), **or with a foreign central government**. Parent(s) will provide a signed copy of the 2017 tax account information issued by the tax authority.

B. NON TAX RETURN FILERS — Apply to each parent in the household. Complete this section if the parent **will not file** and is **not required** to file a 2017 Income Tax Return with the IRS. **Note: We may require you to provide documentation from the IRS that indicated a 2017 IRS income tax return was not filed with the IRS.** Check the box that applies:

- I (if married, and my spouse) was not employed and had no income earned from work in 2017. **(must complete a 2019-2020 Low Income Form. Form can be found at www.gram.edu/finaid)**
- I (if married, and/or my spouse) was employed in 2017 and have listed below the names of all my employers, and the amount earned from each employer in 2017, whether an IRS W-2 form is provided. Please attach copies of all 2017 IRS W-2 forms issued by your employers. If more space is needed, attach a separate page student's name and G Number at the top.

Employer's Name	IRS W-2 Provided?	2017 Amount Earned
<i>ABC's Auto Body Shop (example)</i>	<i>Yes (example)</i>	<i>\$2,000.00 (example)</i>
<i>Total Amount of Income Earned from Work</i>		<i>\$</i>

Student's Name: _____ G#: _____

Verification of 2017 Income Information for Student Tax Filers

A. TAX RETURN FILERS - Apply to the student. Complete this section if you filed or will file a 2017 Income Tax Return with the IRS.

- 1. I have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2017 IRS income tax return information into the student's FAFSA. *The Grambling State University Financial Aid Office will use the IRS information that was transferred in the verification process.*
- 2. I am unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2017 IRS Tax Return Transcript(s)**. Signature is not required. *To obtain a 2017 IRS Tax Return Transcript, go to www.irs.gov, under the Tools heading click "Get a Tax Transcript", or call 1-800-908-9946.*
- 3. I am required to file a 2017 IRS income tax return and have been granted a filing extension** by the IRS. I will provide the following documents:
 - a. 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 2017; and
 - b. A copy of the IRS's approval of an extension beyond the automatic six-month extension for year 2017; and
 - c. A copy of IRS Form W-2 for each source of employment income received for tax year 2017 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 2017.
- 4. I have filed an amended IRS income tax return for tax year 2017.** I will provide the following documents:
 - a. A **2017 IRS Tax Return Transcript** (that will only include information from the original tax return & 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; and
 - b. A signed copy of the 2017 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS.
- 5. I am a victim of identity theft** and have been unable to obtain a **2017 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. I will provide the following documents:
 - 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**
 - b. 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.
- 6. I am an individual who filed or will file a 2017 income tax return with the relevant taxing authority of a U.S. territory, commonwealth, (e.g., Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign central government.** I will provide a signed copy of the 2017 tax account information issued by the tax authority.

B. NON TAX RETURN FILERS — Apply to the student. Complete this section if you **will not file** and is **not required** to file a 2017 Income Tax Return with the IRS. **Note: We may require you to provide documentation from the IRS that indicated a 2017 IRS income tax return was not filed with the IRS.** Check the box that applies:

- I was not employed and had no income earned from work in 2017.
- I was employed in 2017 and have listed below the names of all my employers, and the amount earned from each employer in 2017, whether an IRS W-2 form is provided. Please attach copies of all 2017 IRS W-2 forms issued by your employers. If more space is needed, attach a separate page with your name and G Number at the top

Employer's Name	IRS W-2 Provided?	2017 Amount Earned
<i>ABC's Auto Body Shop (example)</i>	<i>Yes (example)</i>	<i>\$2,000.00 (example)</i>
<i>Total Amount of Income Earned from Work</i>		<i>\$</i>

Student's Name: _____ G#: _____

C. Certification and Signatures

Each person signing below on this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

Student's Signature

Date

Parent's Signature

Date

*Submit this worksheet to the Financial Aid Office at
Grambling State University*

You should make a copy of this worksheet for your records.