DEPENDENT

2012 - 2013 Verification Process

A. The best way to provide this information is to use the electronic IRS link at the FAFSA website. When you reach the point in the FAFSA correction process of updating tax information, a blue button should appear giving you the option of linking to the IRS. Click on this button and follow on-screen prompts to automatically provide the appropriate information from your completed and processed tax return(s). If you are providing parental tax information too, your parent will need his/her FAFSA PIN to complete this step. If you filed electronically, it could take 1-2 weeks for the information to be available electronically; if you mailed the tax return to the IRS, it could take 6-8 weeks to access the information electronically. To use the electronic link to the IRS, you must enter the mailing address and tax filing status exactly as it appears on the taxes you submitted to the IRS; otherwise, it will not link to the IRS.

B. If you choose not to use the electronic link to the IRS, you will need to request a tax transcript from the IRS and give a copy of that to us. We can no longer accept the taxpayer’s copy of the 1040, 1040A, 1040EZ or 1040X, per new U.S. Department of Education rules. There are three ways to get a tax transcript:

1. Call 800-908-9946 and using touch-tone prompts, have a copy of your 2011 taxes sent to the address on the tax return. You cannot use this option if you are at a different mailing address.

2. Go to http://www.irs.gov and request the tax transcript. You cannot use this option if you have a different address.

3. If you have to send a paper request for a tax return transcript, use Form 4506-T (attached). It can take 2-3 weeks for the information to be mailed to you.

If you filed an amended tax return, you must request a tax account transcript, not a tax return transcript.

There may be problems with the IRS website being able to handle all the processing and linking of tax information, especially with this being the first year this new verification system is being implemented. If you have recently filed your taxes, the information will not be immediately available.
2012–2013 Verification Worksheet
Dependent Student

Your 2012–2013 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected.

You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Information

<table>
<thead>
<tr>
<th>Student's Last Name</th>
<th>Student's First Name</th>
<th>Student's M.I.</th>
<th>Student’s Social Security Number</th>
</tr>
</thead>
<tbody>
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</table>

<table>
<thead>
<tr>
<th>Student’s Street Address (include apt. no.)</th>
<th>Student’s Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Student’s Email Address</th>
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<tbody>
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</table>

<table>
<thead>
<tr>
<th>Student's Home Phone Number (include area code)</th>
<th>Student's Alternate or Cell Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

B. Dependent Student's Family Information

List below the people in your parent(s)' household. Include:
- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2012, through June 30, 2013, or if the other children would be required to provide parental information if they were completing a FAFSA for 2012–2013. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2013.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2012, and June 30, 2013. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
<th>Will be Enrolled at Least Half Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missy Jones</td>
<td>18</td>
<td>Sister</td>
<td>Central University</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Self</td>
<td></td>
<td></td>
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</tbody>
</table>
C. Dependent Student’s Income Information to Be Verified

1. TAX RETURN FILERS—Important Note: If the student filed, or will file, an amended 2011 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student filed or will file a 2011 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of the FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student’s FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

Check the box that applies:

☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2011 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student’s school will use the IRS information that was transferred in the verification process.

☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2011 IRS income information into the student’s FAFSA once the student has filed a 2011 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. The student’s school cannot complete the verification process until the IRS information has been transferred into the FAFSA.

☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a 2011 IRS tax return transcript—not a photocopy of the income tax return. To obtain an IRS tax return transcript, go to www.IRS.gov and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.” You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

☐ Check here if the student’s IRS tax return transcript is attached to this worksheet.

☐ Check here if the student’s IRS tax return transcript will be submitted to the student’s school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student’s school.

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is not required to file a 2011 income tax return with the IRS.

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2011.

☐ The student was employed in 2011 and has listed below the names of all the student’s employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 IRS W-2 forms issued to the student by employers. List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name and Social Security Number at the top.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2011 Amount Earned</th>
<th>IRS W-2 Attached?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suzy’s Auto Body Shop (example)</td>
<td>$2,000.00 (example)</td>
<td>Yes (example)</td>
</tr>
</tbody>
</table>
D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—Important Note: If the student's parent(s), filed or will file, an amended 2011 IRS tax return the student’s financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the student’s parent(s) filed or will file a 2011 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student’s parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student’s FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student’s FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student’s financial aid administrator.

Check the box that applies:

☐ The student’s parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2011 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student’s school will use the IRS information transferred into the student’s FAFSA to complete the verification process.

☐ The student’s parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2011 IRS income information into the student’s FAFSA once the parent’s IRS tax return has been filed. See instructions above for information on how to use the IRS Data Retrieval Tool. The student’s financial aid administrator cannot complete verification until the parent has transferred IRS information into the student’s FAFSA.

☐ The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student’s school a copy of the parent’s 2011 IRS tax return transcript(s)—not photocopies of the income tax return. To obtain an IRS tax return transcript go to www.IRS.gov and click on the “Order a Return or Account Transcript” link, or call 1-800-908-9946. Make sure you order the “IRS tax return transcript” and not the “IRS tax account transcript.” The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parent is married, and separate 2011 tax returns were filed, 2011 IRS tax return transcripts must be submitted for each parent.

☐ Check here if an IRS tax return transcript(s) is attached to this worksheet.

☐ Check here if IRS tax return transcript(s) will be submitted to the student’s school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—Complete this section if the student’s parent(s) will not file and is not required to file a 2011 income tax return with the IRS.

Check the box that applies:

☐ The parent(s) was not employed and had no income earned from work in 2011.

☐ The parent(s) was employed in 2011 and has listed below the names of all the parent’s employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 IRS W-2 forms issued to the parent(s) by employer(s). List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student’s name and Social Security Number at the top.

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2011 Amount Earned</th>
<th>IRS W-2 Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suzy's Auto Body Shop</td>
<td>$2,000.00</td>
<td>Yes</td>
</tr>
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</table>
E. Parent’s Other Information to Be Verified

1. Complete this section if someone in the student’s parent’s household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2010 or 2011 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2010 or 2011. If asked by the student’s school, I will provide documentation of the receipt of SNAP benefits during 2010 and/or 2011.

2. Complete this section if one of the student’s parents paid child support in 2011.

☐ One (or both) of the student’s parents listed in Section B of this worksheet paid child support in 2011. The parent has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2011 for each child. If asked by the school, I will provide documentation of the payment of child support. If you need more space, attach a separate page that includes the student’s name and Social Security Number at the top.

<table>
<thead>
<tr>
<th>Name of Person Who Paid Child Support</th>
<th>Name of Person to Whom Child Support was Paid</th>
<th>Name of Child for Whom Support Was Paid</th>
<th>Amount of Child Support Paid in 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marty Jones</td>
<td>Chris Smith</td>
<td>Terry Jones</td>
<td>$6,000.00</td>
</tr>
</tbody>
</table>

F. Certification and Signatures

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

[Signature] [Date]

[Signature] [Date]

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

Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the financial aid administrator at your school.

You should make a copy of this worksheet for your records.
**Request for Transcript of Tax Return**

**Tip:** Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Order a Transcript" or call 1-800-908-9946. If you need a copy of your return, use Form 4506, Request for Copy of Tax Return. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.

1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)

2a If a joint return, enter spouse's name shown on tax return.

2b Second social security number or individual taxpayer identification number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.

**Caution:** If the tax transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your IRS transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request.

   a Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days .

   b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days .

   c Record of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days .

7 **Verification of Nonfiling,** which is proof from the IRS that you did not file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days .

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 Information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2010, filed in 2011, will not be available from the IRS until 2012. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days .

**Caution:** If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

   Check this box if you have notified the IRS or the IRS has notified you that one of the years for which you are requesting a transcript involved identity theft on your federal tax return .

**Caution:** Do not sign this form unless all applicable lines have been completed.

**Signature of taxpayer(s).** I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, either husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. Note: For transcripts being sent to a third party, this form must be received within 120 days of the signature date.

**Phone number of taxpayer on line 1a or 2a**

**Signature (see instructions) Date**

**Title (if line 1a above is a corporation, partnership, estate, or trust)**

**Spouse's signature Date**

For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Cat. No. 37168T

Form 4506-T (Rev. 1-2012)
Chart for all other transcripts
If you lived in or your business was in:

Mail or fax to the "Internal Revenue Service" at:

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, or an A.P.O. or F.P.O. address
RAVS Team
P.O. Box 9941
Mail Stop 6734
Ogden, UT 84409
801-620-8922

Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia
RAVS Team
P.O. Box 145500
Stop 2800 F
Cincinnati, OH 45250
859-609-3352

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return for example. If you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P.O. box, enter the P.O. box number here.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note. If the address on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822.

Line 6. Enter only one tax form number per request.

Signature and date. Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal non-tax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: Learning about the law or the form, 10 min.; Preparing the form, 12 min.; and Copying, assembling, and sending the form to the IRS, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to: Internal Revenue Service, Tax Products Coordinating Committee, SE/WCARP:MP-TM:S
111 Constitution Ave. NW, Washington, DC 20224.
Do not send the form to this address. Instead, see Where to file on this page.