

D. Student Income Information

Have you or will you file a 2017 U.S. Federal Tax Return?

- YES:** Submit your Student 2017 Tax Return Transcript from the IRS. Tax transcripts are not the same as copies of the IRS 1040 tax returns. ***Instructions for requesting a transcript on page 4***
- NO:** Complete this section if the student did not/will not file and is not required to file a 2017 Federal IRS Tax Return.

This section for non-tax filers only

Non-Tax Filers Only - Check the one box that applies:

- The student was not employed and had no income earned from work in 2017.
- The student was employed in 2017. Complete the table below and submit all W-2 and 1099 forms documenting student income. If you were not issued a W-2 from your employer, provide a written statement explaining why not, along with any other documentation you may have been issued.

Source of Income/Employer Name	2017 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

Victims of Identity Theft: If you the student were a victim of an IRS identity theft for the 2017 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 4 for additional instructions.

- Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2017 tax year. The IRS has been made aware of this tax-related identity theft.

E. Parent Income Information

Complete the section below for the parent(s) listed in Section C of this worksheet. If two parents were listed in the household, provide information below for both.

Have you or will you file a 2017 U.S. Federal Tax Return?

- YES:** Submit your Parent 2017 Tax Return Transcript from the IRS. Tax transcripts are not the same as copies of the IRS 1040 tax returns. ***Instructions for requesting a transcript on page 4***
- NO:** Complete this section if the parent did not/will not file and is not required to file a 2017 Federal IRS Tax Return. **In addition, confirmation of non-filing status is REQUIRED from the IRS.** ***Instructions for requesting a Verification of Non-Filing letter on page 4***

This section for non-tax filers only

Non-Tax Filers Only - Check the one box that applies:

- The parent was not employed and had no income earned from work in 2017. **Additional information may be requested**
- The parent was employed in 2017. Complete the table below and submit all W-2 and 1099 forms documenting parent income. If you were not issued a W-2 from your employer, provide a written statement explaining why not, along with any other documentation you may have been issued.

Source of Income/Employer Name	2017 Amount Earned	Was a W-2 issued by the employer? If yes, you must submit a copy.
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No
	\$	<input type="checkbox"/> Yes <input type="checkbox"/> No

Victims of Identity Theft: If you the parent were a victim of an IRS identity theft for the 2017 tax year, we cannot use the IRS Tax Return Transcript. Please indicate yes below and see page 4 for additional instructions.

- Yes, I was a victim of an IRS tax-related Identity Theft and cannot obtain an IRS Tax Return Transcript for the 2017 tax year. The IRS has been made aware of this tax-related identity theft.

Parental Information for Dependent Students

If your parents are divorced or separated, you should provide information for the parent you lived with more during the 12 months prior to completing your FAFSA. If this parent is remarried as of the date you completed the FAFSA, you should also provide information for your stepparent.

If your legal parents (biological and/or adoptive) are not married to each other and live together, you should provide information about both of them regardless of their gender. Same-sex couples must report their marital status as married if they were legally married in a state or jurisdiction that permits same-sex marriage.

Requesting A Tax Transcript

On The Web—Go to www.irs.gov

By Phone—Call 1-800-908-9946

- The following information is needed to request a transcript—Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2017 tax return was filed).
- It takes up to 2 weeks after filing a tax return for IRS income information to be available for electronic IRS tax return filers, and up to 8-12 weeks for paper IRS tax return filers.
- Be sure to request the “IRS Tax Return Transcript” and not the “IRS Tax Account Transcript”.
- We strongly recommend that you have the transcript sent to you and then you submit a copy to our office, and keep a copy for your own records.
- Be sure to submit all pages of the transcript.

For more information on requesting a tax return transcript, go to <http://financialaid.truman.edu> and click Selection for Verification.

What To Do If You Have Trouble Obtaining A Transcript

When did you submit your 2017 return? It can take up to 8-12 weeks after filing your return before transcript information is available.

Try a different requesting method; if you were unsuccessful with the online method, the phone method may work for you.

For more assistance in obtaining a transcript contact the Truman Financial Aid Office.

Verification Requirements For Individuals Filing An Amended Return

For individuals who have filed an amended return, additional information is needed for verification purposes. Please note, the IRS Tax Return Transcript only shows the information submitted on the original return and does not reflect changes made by the amendment. Therefore the following items are required:

- 2017 IRS Tax Return Transcript
- A signed copy of the individual’s 1040X—Amended Return

IRS Data Retrieval

- For individuals who used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer unchanged 2017 IRS income information into the student’s FAFSA, either on the initial FAFSA or when making corrections to the FAFSA, the Financial Aid Office will use this information instead of a tax transcript. Please note, in some instances, a transcript may still be needed.
- If you have not yet used the IRS Data Retrieval Tool, but will use it to transfer 2017 IRS income information into the student’s FAFSA instead of requesting a tax return transcript, please notify the Financial Aid Office once the FAFSA has been successfully updated with the IRS data.

Verification of Non-Filing Letter

If a parent did not file a Federal 2017 Tax Return, they are required to obtain documentation from the IRS that they did not file. An IRS Verification of Non-Filing Letter provides proof that the IRS has no record of a filed 1040, 1040A or 1040EZ for the individual. A Verification of Non-Filing Letter can be obtained by the following:

On the Web - Go to www.irs.gov and select “Get a tax transcript” under tools and then “Get Transcript Online”. You will need to create a user name.

By Mail - Print IRS Form 4506-T online at www.irs.gov. Check the box next to #7 to confirm verification of non-filing status. Complete #9 with the 2017 tax period ending 12/31/2017.

Victims of Identity Theft

IRS Tax Return Transcripts and the Data Retrieval Tool on the FAFSA are not available for victims of identity theft. An individual who is a victim of identity theft and cannot get a return transcript must contact the IRS’s Identity Protection Specialized Unit (IPSU) at 1-800-908-4490. After the IPSU authenticates the tax filer’s identity, they can request an alternate transcript called a Transcript Database View (TRDBV). Please indicate on this worksheet that you are a victim of Identity Theft and submit the TRDBV in place of a tax return transcript.