

Verification of Student's (and spouse, if married) 2015 IRS Income Tax Information for the 2016-2017 Academic Year

Your 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 reported on the FAFSA. In this process, Appalachian State University's Office of Student Financial Aid will compare information from your FAFSA with the financial documents you are required to submit. If there are differences, in most cases we will be able to send the corrections electronically to the federal processor to have your information reprocessed.

To determine the documents you must submit to complete verification, check your financial aid requirements by logging into your AppalNet account and clicking on the "Financial Aid" tab.

You may fax, mail, email or bring your verification documents to:

Mailing Address:

Appalachian State University, Office of Student Financial Aid
ASU Box 32059

Boone, NC 28608-2059

Fax Number: 828-262-2585

Email: financialaid@appstate.edu

You should complete verification as soon as possible, so that your financial aid won't be delayed. Please carefully read and follow the directions in this document, on your AppalNet account and on all other forms you have been requested to submit. If you have questions, please contact our office.

We must receive and review the requested information, under the financial aid program rules (34 CFR, Part 668).

Student's (and/or spouse, if married) 2015 IRS Income Tax Information

TAX RETURN FILERS – If you (and your spouse, if married) have filed or will file a 2015 federal income tax return with the IRS, please read carefully the instructions below.

The best way to verify the student's (and spouse, if married) tax information is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. The student (and spouse, if married) should go to www.fafsa.ed.gov, log into the FAFSA, click on "Make FAFSA Corrections" and navigate to the Financial Information section of the form. In most cases, for electronic filers, the IRS Data Retrieval Tool is available within 2-3 weeks after the 2015 IRS income tax return has been accepted by the IRS. For filers of paper tax returns, the IRS Data Retrieval Tool is available within 8-11 weeks after the 2015 paper IRS income tax return has been accepted by the IRS.

If the student (and spouse, if married) chooses not to, or is not eligible to use the IRS Data Retrieval Tool, a 2015 IRS Tax Return Transcript must be submitted. The Tax Return Transcript must be requested directly from the IRS. By going to www.irs.gov/transcript. The IRS Tax Return Transcript can also be requested by calling 1-800-908-9946. Make sure to request 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 2015 IRS income tax return, and the address on file with the IRS (normally this will be the address used on the 2015 IRS income tax return). In most cases, for electronic filers, the IRS Tax Return Transcript may be requested from the IRS 2-3 weeks after the 2015 IRS income tax return has been accepted by the IRS. For filers of paper tax returns, the IRS Tax Return Transcript may be requested within 8-11 weeks after the 2015 paper IRS income tax return has been accepted by the IRS.

SPECIAL CIRCUMSTANCES

- If the student (and spouse, if married) filed, or will file, an amended 2015 IRS tax return, the student must submit a copy of the original 2015 IRS Tax Return Transcript, and a signed copy of the amended 2015 IRS 1040X that was filed with the IRS.
- If the student (and spouse, if married) was a victim of identity theft they must submit the 2015 Tax Return Data base view Transcript (TRDBV), which can be obtained from the IRS, by contacting the IRS at 1-800-908-4490. In addition to the TRDBV Transcript, the tax filer also must provide a signed and dated statement regarding the identity theft and attesting the filer notified the IRS about the theft.
- If the student (and spouse, if married) will not and is not required to file a 2015 income tax return, please complete page 2, section A and submit to the Financial Aid Office.
- If the student (and spouse, if married) was granted a tax filing extension by the IRS, please complete page 2, section B and submit to the Financial Aid Office.

Student Name: _____ Banner: 900 _____
 Last First Middle

Please complete this section ONLY if the student (and spouse, if married) will not and is not required to file a 2015 income tax return.

A. TAX RETURN NONFILERS - Complete this section if you, the student (and your spouse, if married) will not and are not required to file a 2015 income tax return.

Check one:

- The student (and the student's spouse, if married) was not employed and had no income earned from work in 2015.
- The student (and the student's spouse, if married) was employed in 2015 and has listed below the names of all the student's (and the student's spouse, if married) employers, the amount earned from each employer in 2015, and whether an IRS W-2 form is attached. Copies of all 2015 W-2 forms issued to the student (and, if married, the student's spouse) must be attached.

Employer's Name	2015 Amount Earned	IRS W-2 Attached?

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

Each person signing below certifies that all of the information reported is complete and correct.

X _____ X _____
 Student Signature Date Spouse Signature Date
 Electronic signatures will not be accepted.

Please complete this section ONLY if the student (and spouse, if married) has been granted a tax filing extension by the IRS for the 2015 tax year.

B. STATEMENT OF TAX FILING EXTENSION

TAXEXT

I certify that I and my spouse, if married, have been granted a tax filing extension by the IRS for the 2015 tax year. I acknowledge that a signed copy of my tax return transcript must be submitted to the Office of Student Financial Aid once the tax return has been filed and that this could result in a recalculation of my financial aid awards for the 2016-2017 academic year.

Check and complete below as it pertains to your situation:

- I and my spouse, if married, are self-employed individuals who have been granted a tax filing extension.

The 2015 estimated Adjusted Gross Income (AGI) and taxes paid are:

2015 estimated AGI _____

2015 estimated taxes paid _____

The completed IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Tax Return" must be attached.

- I and my spouse, if married, had earned income in 2015 and have been granted a tax filing extension.

The 2015 estimated Adjusted Gross Income (AGI) and taxes paid are:

2015 estimated AGI _____

2015 estimated taxes paid _____

The completed IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Tax Return" and copies of all 2015 W-2 forms must be attached.

Each person signing below certifies that all of the information reported is complete and correct.

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

X _____ X _____
 Student Signature Date Spouse Signature Date

Electronic signatures will not be accepted.