

## **Verification of Student's 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](mailto: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 2015 IRS Income Tax Information**

**TAX RETURN FILERS** – If you 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 your tax information is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. You should go to [www.fafsa.ed.gov](http://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 you choose not to, or are not eligible to use the IRS Data Retrieval Tool, you must submit a signed Tax Return Transcript. The Tax Return Transcript must be requested directly from the IRS, by going to [www.irs.gov/transcript](http://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 your Social Security Number and date of birth 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. Be sure to sign the Tax Return Transcript.

### **SPECIAL CIRCUMSTANCES**

- If you filed, or will file, an amended 2015 IRS tax return, you must submit a copy of the 2015 Tax Return Transcript and a signed copy of the amended 2015 IRS 1040X that was filed with the IRS.
- If you were a victim of identity theft, you must submit the Tax Return DataBase View transcript (TRDBV), which can be obtained from the IRS, by contacting them 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 you will not and are not required to file a 2015 income tax return, please complete page 2, section A and submit to the Financial Aid Office.
- If you were granted a tax filing extension by the IRS, please complete page 2, section B and submit to the Financial Aid Office.

Student Name: \_\_\_\_\_ Banner ID: 900 \_\_\_\_\_  
 Last First Middle

Please complete this section ONLY if you will not and are not required to file a 2015 income tax return.

**A. TAX RETURN NONFILERS** - Complete this section if you will not and are not required to file a 2015 income tax return.

Check one:

I was not employed and had no income earned from work in 2015.

I was employed in 2015 and have listed below the names of all my 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 must be attached.

Employer's Name	2015 Amount Earned	IRS W-2 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 \_\_\_\_\_  
 Student Signature Date

Electronic signatures will not be accepted.

Please complete this section ONLY if you have 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 have been granted a tax filing extension by the IRS for the 2015 tax year. I acknowledge that a 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 am self-employed 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" must be attached.

I 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 correct.

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

X \_\_\_\_\_  
 Student Signature Date

Electronic signatures will not be accepted.