

Filing Status Worksheet (Instructions)

Instructions for Tax-Filers

*To obtain an IRS tax return transcript, you can go to www.irs.gov and under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." Or you can call 1-800-908-9946.*

Please note that if you are eligible to use the IRS Data Retrieval Tool to link your taxes to the FAFSA, that this option may limit any current and future request for verification and may result in a quicker resolution of your verification status.

2017-2018 Independent Filing Status Worksheet

(PLEASE CHECK ONE AND FOLLOW ALL INSTRUCTIONS)

2015 Non-Filers

Student Last

Student First

Middle Initial

Student SSN

- I (and my spouse, if married) did not (and was not required to) file taxes in 2015 – neither of us had any income earned from work
- I (and my spouse, if married) did not (and was not required to) file taxes in 2015; however, I (and/or my spouse) was employed. Please complete information below and provide copies of all 2015 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2015 IRS W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W2 is unavailable

Employer's Name	2015 Amount Earned	Employee's name (student/spouse)	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00	Student	Yes

2015 Federal Income Tax Filers

- I (and my spouse, if married) filed taxes in 2015 (and)
- I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2015 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
 - I am unable to use the IRS Data Retrieval Tool, and I will submit copies of my 2015 Federal Tax Return Transcript (*not a copy of the tax return form*) to my school.
- (Married students only) I and my spouse filed separately in 2015 and I will submit copies of our 2015 Federal Tax Return Transcripts
- (Married students only) I and my spouse filed jointly in 2015, but we are now separated. I will provide a copy of our 2015 Federal Tax Return Transcript along with all of my 2015 W-2s.

Special Circumstance:

- Check here if for the 2015 tax year, you- and/or your spouse-were granted a filing extension, filed an amended tax form, were a victim of identity theft, or if you filed a non-IRS Income tax return. **(If you check this box, we must have a completed "Verification of Unusual Tax Circumstances" form)**

CERTIFICATION AND SIGNATURE

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

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

Student Signature (Required)

Date (Required MM/DD/YYYY)

Spouse Signature (Optional)

Date (Required MM/DD/YYYY)