PINC14

Verification of 2013 Income Information for Parents (2014-15)

Your application was selected for review in a process called "Verification." In this process, Marshall University Office of Student Financial Assistance (MU SFA) will be comparing information from your processed Free Application for Federal Student Aid (FAFSA) with the information on this form and other financial documents as requested. Federal and state laws state we have the right to ask you for this information before disbursing federal and state aid. If there are differences between your application information and your financial documents, MU SFA must make corrections to your application electronically. This may result in changes to your estimated financial aid awards. After verification is completed, if any changes to your estimated awards are necessary, you will be notified.

Student Name: _____ **MUID:** 901_____

Complete the information below and attach any other documentation requested, if required, when submitting this form. Responses on this form apply to each parent listed on the 2014-15 Verification of Household Size for Dependent/FAFSA.

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT), which is part of FAFSA on the Web at *www.FAFSA.gov*. In most cases, no further documentation is needed to verify 2013 income information transferred into the FAFSA using the IRS DRT, if that information was not changed.

Check box that applies:

☐ **A.** The parent(s) **have used** the IRS DRT in FAFSA on the Web to transfer 2013 IRS income tax return information into the student's FAFSA.

☐ **B.** The parent(s) **have not yet used** the IRS DRT but will use the tool to transfer 2013 IRS income tax return information into the student's FAFSA once the 2013 IRS income tax return has been filed and processed. Note: If your parents filed separate returns, this tool cannot be used and 2013 IRS Tax Return Transcripts will be required.

☐ **C.** The parent(s) **have attached** a copy of their **2013 IRS Tax Return Transcript**. Each parent must submit their Transcript if filed separate returns. To obtain a Transcript, read and choose an option on the back of this form. Do not submit this form until there is a Tax Return Transcript(s) to attach.

☐ **D.** Neither parent was employed AND had no income earned from work in 2013.

☐ **E.** One/both parents were employed in 2013 AND did not file. Complete the chart below and attach copies of all 2013 W-2s. If more space is needed, provide a separate page with the student's name and ID number at the top. Note: You may be required to provide documentation from the IRS that a 2014 IRS income tax return was not filed.

Only complete chart if response above is E.

Employer's Name	Parent Name	Amount Earned	W-2 Attached (circle)
			Yes No
			Yes No
			Yes No
			Yes No

Signing this form certifies all information reported on it is complete and correct. The student and at least one parent must sign and date.

_____ _____
Student Signature Date

_____ _____
Parent Signature Date

Submit to: Marshall University
Office of Student Financial Assistance
One John Marshall Drive
Old Main 116
Huntington, WV 25755-3300
FAX: 304.696.3242

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

IRS Tax Return Transcript Request Process

Marshall University's Office of Student Financial Assistance prefers students and parents use the **IRS Data Retrieval Tool** when completing the FAFSA. If this process is successfully used and no data elements are changed, this office should not need to collect a Tax Return Transcript from students or parents.

Unfortunately, the IRS Data Retrieval Tool cannot be used by all applicants for a variety of reasons. If you are one of those applicants and this office has requested a copy of your or your parents IRS Tax Return Transcript, the options shown below should help you obtain a transcript. (Note: The Office of SFA cannot accept Account Transcripts.)

Tax filers may request an IRS Tax Return Transcript, free of charge, from the IRS in one of three ways: online, telephone, paper request form. **If you need assistance with this process, please contact the IRS at 800-829-1040.**

Get Transcript (online) Preferred Method

- Go to *www.irs.gov/transcript*.
- Click Get Transcript ONLINE.
- Sign In or Create an Account.
- Follow prompts to request a Tax Return Transcript for the year being requested by the Office of SFA.
- Once authenticated, you should be able to immediately print or save the PDF version of the Tax Return Transcript to computer.

Online Request

- Go to *www.irs.gov/transcript*.
- Click Get Transcript by MAIL.
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS.
- Click "continue."
- In the Type of Transcript field, select "Return Transcript," and in the Tax Year field, select year for which you want Transcript.

Paper Request Form – IRS Form 4506T-EZ

- Download IRS Form 4506T-EZ at *www.irs.gov/Forms-&-Pubs*.
- Complete all lines of form as instructed on page 2 of form.
- The tax filer (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed form to the appropriate address or fax number as provided on page 2 of the Form.

Telephone Request

- Call the IRS at 1-800-908-9946.
- Tax filers must follow prompts to enter their social security number and the numbers in their street address.
- Select option to request an IRS Tax Return Transcript and then enter the tax year for which you want.

If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in the request within 5 to 10 days of successful processing by the IRS.

If there has been a change of address since you filed your tax return, you must contact the IRS at 800-829-1040 to determine the best method for requesting a Tax Return Transcript.

DO NOT have Transcripts directly sent to Marshall University's Office of SFA. This office may not be able to connect information on the return to the student. ALWAYS have the transcript mailed to the tax filer then mail, fax or bring it to the office with the student's name and MUID.