

Independent Verification Form Instructions

Your federal aid application (FAFSA) was selected for a review process called “verification.” The financial aid office will compare your FAFSA with the information on this form and any other required documents. If there are differences, your FAFSA information may need to be corrected. The financial aid office will make any necessary corrections to your FAFSA using the documents you provide. [Federal regulations give the financial aid office authority to request this information before awarding federal aid (34 CFR, Part 668). This includes Federal Direct Student loans.]

1. Complete and submit this form (pages 1 and 2), along with any other required documents, to the financial aid office. Read the instructions for each Section (below) to determine the appropriate answers/action.
2. **Refer to “Your Eligibility Requirements” on the Financial Aid tab in your Banner account or your JCC Request for Information (RFI) letter** to determine what you must submit with this Verification Form. After a financial aid representative reviews your information you could be asked to submit additional documentation.
3. **Do not make changes to your FAFSA at this time** other than to use the IRS Data Retrieval Tool.

SECTION A. Student Information: Print neatly so we are able to match your information to your file and provide a phone number where you can be reached in case we have additional questions.

SECTION B. Household and Number in College:

Who should be included in household and number in College?

- Yourself and your spouse (if married and not separated).
- Your children if you will provide more than half of their support from July 1, 2016, through June 30, 2017, even if they do not live with you.
- Other people if they now live with you now and will continue to live with you July 1, 2016 through June 30, 2017 and you continue to provide more than half of their support during this period.
- **Include the name of the college** for any household member who will be enrolled **at least half time** in an undergraduate degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2016 and June 30, 2017.

SECTION C. Income Information:

If you and/or your spouse checked the box indicating that you/they did work but were not required to file, you must attach copies of all W-2 forms received. If you and/or your spouse earned income for which you did not receive a W-2, you must complete the form to provide detail of the income earned. If more space is required, attach a separate paper with Student’s JCC ID number and the wage earner, employer information, and amount earned in 2015.

IMPORTANT: Do not submit copies of 2015 1040/1040A/1040EZ!

Read instructions on page 3 for providing tax information.

JCC Financial Aid Office | PO Box 20 | Jamestown, NY 14702-0020
Jamestown 716.338.1009 | 1.800.388.8557 ext 1009 | Olean 716.376.7512 | 1.800.388.8557 ext 7512
FAX 716.338.1459 | EMAIL financialaid@mail.sunyjcc.edu

We recommend you mail your documents via the US Postal Service to protect your personal information.

Independent Verification Form Instructions (continued)

How do I provide 2015 tax return information for verification?

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to www.fafsa.gov, log in and select "[Make FAFSA Corrections](#)." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2015 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you **must** obtain an IRS tax return transcript (*copies of your original Form 1040 tax return are not acceptable for verification purposes*). In most cases, for electronic filers, a 2015 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available. See the table below for more information about when your tax information should be available.

To request an IRS tax return transcript, go to www.irs.gov and click the "Get a Tax Transcript" link. Use the Social Security Number and date of birth of the first person listed on the 2015 tax return and the address on file with the IRS (normally the address used on your 2015 IRS tax return). If you are having difficulty retrieving your data you can check the correct format of your address at www.usps.com. Click on "Look Up a ZIP Code" and follow instructions to retrieve your address. Make sure you request the "**Tax Return**" transcript and **not** the "Tax Account" transcript.

If you are unable or choose not to use the DRT and cannot order your tax return transcript at www.irs.gov, you must call the IRS at 1-800-908-9946 to receive a transcript by mail.

The IRS will mail the tax return transcript to the address on then tax return. Provide the transcript to the financial aid office along with your Verification Form.

When will 2015 tax return information be available for IRS DRT or a Tax Return Transcript?

	<u>Electronic Tax Filers:</u>	<u>Paper Tax Filers:</u>
You expect a refund	Within 3 weeks of filing	Within 8-11 weeks of filing
You paid a balance due with return	Within 3 weeks of filing	Mid-July
You paid a balance due after filing	Within 4 weeks of final payment	Mid-July
You still owe a balance to the IRS	Mid-June	Mid-July

Special Situations:

Amended Returns - If you filed an amended tax return, you must submit a 2015 IRS Tax Return Transcript, and a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return."

Victims of IRS Identity Theft - A victim of IRS identity theft who is not able to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490 to receive a printout of the tax return by mail. Submit this printout along with a signed statement indicating that you were a victim of IRS tax-related Identity theft and that the IRS has been made aware of the tax-related identity theft to the financial aid office.

Non-IRS Income Tax Returns-An individual who filed or will file a 2015 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a signed copy of the 2015 income tax return.