

**EARNED INCOME VERIFICATION**

Student's name: \_\_\_\_\_ Phone: \_\_\_\_\_

**SECTION A. Student Income Information (Including spouse, if married):**

*Check the appropriate box. See Pages 2 and 3 for instructions to provide 2015 tax filing information.*

- The student/spouse filed a 2015 federal tax return and used the IRS Data Retrieval Tool in FAFSA on the Web. (Note: IRS Data Retrieval Tool is not available as of March 2017.)
- The student/spouse filed a 2015 federal tax return. **Attach a 2015 IRS Tax Return Transcript (preferred) OR a SIGNED copy of your 2015 federal tax return.**
- Student is married as of the date the FAFSA was filed but student and spouse filed separate tax returns in 2015. **Attach 2015 IRS Tax Return Transcripts (preferred) OR SIGNED copies of 2015 federal tax returns for both student and spouse.**
- The student is not married and was not employed and had no income earned from work in 2015.
- The student is not married and was employed or earned income from work in 2015 but did not file and is not required to file a 2015 federal tax return. **Attach copies of all W-2 forms received. Student will answer the question below and provide information as necessary.**
- The student is married and both student and spouse were not employed and had no income from work in 2015.
- The student is married and the student and/or spouse were employed or earned income from work in 2015 but did not file and is not required to file a 2015 federal tax return. **Attach copies of all W-2 forms received. Student and spouse will answer the question below and provide information as necessary.**

Did the student (and/or spouse, if married) earn income in 2015 for which he/she **did not** receive a W-2?  NO  YES  
 If YES, complete the box below:

Student/Spouse Name	Source of earned income for which student/spouse did not receive a W-2	Amount Earned in 2015

Check this box and attach a separate page with student's name and JCC ID number at the top if more space is needed.

**SECTION B. Certification:**

*I certify that all information provided in this document is true, complete and accurate. I understand that if I purposely give false or misleading information I may be fined, sentenced to jail, or both.*

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

**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](mailto:financialaid@mail.sunyjcc.edu)  
 We recommend you mail your documents via the US Postal Service to protect your personal information.

## OPTION 1 – Submit a Tax Return Transcript – Preferred

### How to request a Tax Return Transcript Online – Get a Tax Transcript at [www.irs.gov](http://www.irs.gov)

#### What you need to Get Transcript Online:

- Social Security Number • date of birth • mailing address from your latest tax return • tax return filing status • access to your email account • personal account number from a credit card, mortgage, home equity loan, or car loan • a mobile phone with your name on the account
1. Click “Get Transcript Online” and follow prompts to create an account.
  2. Select **Tax Return Transcript for 2015**.
  3. Download and print transcript. You may need to disable your computer’s pop-up blocker.
  4. Submit transcript to the Financial Aid office.

#### What you need to Get Transcript by Mail:

- Social Security Number or ITIN • date of birth • mailing address from your latest tax return
1. Provide the requested information. The IRS uses your SSN, date of birth, and the address used to file your tax return to verify your identity.
  2. Under “Type of Transcript”, select **Return Transcript**. Under “Tax Year”, select **2015**.
  3. You can expect to receive your tax return transcript by mail in 5-10 days at the address on your 2015 tax return.
  4. Submit transcript to the Financial Aid office.

### How to request a Tax Return Transcript by phone – Automated Telephone Request 1-800-908-9946

1. Follow the automated prompts to enter the primary tax filer’s Social Security Number and the numbers of the street address as filed on the 2015 tax return.
2. Select “Option 2” to request a “Return Transcript.” Enter “2015” for the year. *Do not select “Option 1” for an “Account Transcript”; this document is not a complete record of the tax return.*
3. If your request is successful, the message on the telephone will indicate that the IRS has accepted your request.
4. You can expect to receive your tax return transcript in 5-10 days at the address on your 2015 tax return.
5. Submit the transcript to the Financial Aid Office.

## OPTION 2 – Submit a SIGNED copy of your 2015 Federal Tax Return

### FORM 1040 – FORM 1040A – FORM 1040EZ

Changes enacted by the Department of Education on 4/24/2017 allow us to accept signed copies of 2015 federal tax returns to verify tax information reported on the 2016-17 and 2017-18 FAFSA applications.

**Submit a copy of your 2015 Federal Tax Return.** Form 1040/1040A – Pages 1 and 2; Form 1040EZ – Page 1.  
**SIGN your tax return in the signature area.** Form 1040/1040A – Sign on Page 2; Form 1040EZ – Sign on Page 1

**Do not submit your state tax return.  
Unsigned taxes will not be accepted.**

## INSTRUCTIONS FOR SPECIAL SITUATIONS

**Amended Returns** - If you filed an amended tax return, you must submit a 2015 IRS Tax Return Transcript or a signed copy of your 2015 Federal Tax Return, 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 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 a 2015 income tax return with Guam, Northern Mariana Islands, Puerto Rico, or the U.S. Virgin Islands may provide a signed copy of the 2015 income tax return. An individual who filed a 2015 income tax return with American Samoa must provide a tax return transcript from the taxing authority. An individual who filed a 2015 income tax return with a foreign tax authority but provide a tax return transcript from the taxing authority unless the taxing authority charges a fee to obtain the transcript. In that case, provide documentation that there is a fee along with a signed copy of the 2015 income tax return.