

Verification Worksheet Income Instructions

Please use these guidelines for both student and parent sections of the Verification Worksheet:

Did you work during 2016?

No, I did not work during 2016. Please check the box that says, “The student/parent was not required to file, because they had no income earned from work in 2016.” You will need to provide a non-filer statement from the IRS. Please follow the instructions on requesting an IRS non-filer statement on the other side of this page.

Yes, I did work. If you worked and earned money during 2016, you will need to give us information on how much you earned. Please look at the information under **Did you file U.S. taxes in 2016?**

Yes, I did work, but not in the U.S. If you were working in a country other than the U.S. in 2016, you still need to document your income. Please bring all income and tax information from the country where you were working to the Financial Aid Office. You will need to write a statement listing the country and employer, as well as your income converted to U.S. dollars. Please also check the box that says, “The student (and/or the student’s spouse)/parent was employed in 2016, was not required to file a tax return, and is attaching W-2’s for all employers. Please list employers and earnings in the box below.”

Did you file U.S. taxes in 2016?

No, I did not file a tax form with the IRS. People that earn under \$10,000 do not always have to file taxes. If you earned less than \$10,000 and did not file, you will need to check the box that says, “The student (and/or the student’s spouse if married)/parent was employed in 2016, was not required to file a tax return, and is attaching W-2’s for all employers. Please list employers and earnings in the box below.” You will then need to list the places where you worked and the amount you earned. You will also need to provide copies of your W-2’s and an IRS non-filer statement. Please follow the instructions on printing W-2’s and the IRS non-filer statement on the other side of this page.

Yes, I did file a tax form with the IRS. If you earned more than \$10,000, you may have been required to file a tax return. You must document this for verification. You can either:

- a) *Use the IRS Data Retrieval Tool as part of the FAFSA. If you have already done this, please check the box that says, “The student filed taxes and has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2016 IRS income information into the student’s FAFSA.” Please note that it takes 3 business days for BHCC to receive confirmation of the Data Retrieval Tool being completed on the FAFSA. **OR***
- b) *Provide a paper copy of your IRS tax return transcript. The tax return transcript form is different than the 1040 form you complete with your tax preparer. To get a copy, you must request it directly from the IRS. If you are choosing this option, please follow the directions on the other side of this page on printing your IRS tax return transcript.*

My marital status has changed since I filed my 2016 taxes. What do I need to do?

No change: Use your tax information as it appears on your 2016 tax return.

Married/Remarried: To reflect your new status, you will need to be sure to provide tax return transcripts for both you and your spouse, even if you did not file jointly in 2016.

Divorce/Separation: If you have been divorced or separated and filed as married filing jointly, you may need to provide some additional information to help us process your file. Please provide documentation of divorce/separation (court documents, 2017 tax forms filed from separate addresses for you and your former spouse) with your tax return transcript so that we can assist you. If you are divorced, please be sure that you are not including your former spouse in the list of people in your household on your Verification Worksheet.

If you do not have copies of your 2016 tax information available, please contact the IRS to get copies of these documents.

To order copies of your IRS tax return transcript (BY MAIL)

- Visit the IRS website at www.irs.gov
- Click “Get Your Tax Record”.
- Then click on “Get a Transcript by Mail”.
- Fill out the form with the same address that you listed on your IRS 1040, then click continue.
- On this page, under “Type of Transcript” select Return Transcript.
- Then select the 2016 tax year.

To order and IRS Verification of Non-filing Letter (BY MAIL)

- Visit the IRS website at www.irs.gov
- Click “Get Your Tax Record”
- Then click on “Get a Transcript by Mail”.
- Fill out the form with the same address, then click continue.
- The IRS will indicate that they do not have a record for you for 2016.
- Follow the on screen instructions to request your Verification of Non-filing letter

To print copies of your IRS tax return transcript (ONLINE)

- Visit the IRS website at www.irs.gov
- Click “Get Your Tax Record”.
- Click “Get Transcript Online”.
- Click “Get Started” and follow the on screen instructions to create an online account with the IRS. You will need to access your email and have access to credit card information to verify your identity. To proceed without credit card information, choose the option to have a tax return transcript mailed to you.
- Fill out the form with the same address that you listed on your 2016 IRS 1040, then click “Continue” If you filed “Married filing Jointly”, you may need to provide your spouse’s information to retrieve your tax return transcript.
- Under “Type of Transcript” select Return Transcript.
- Choose the 2016 tax year. When your tax return transcript appears, please print a copy and attach to your Verification Worksheet.

NOTE: If you have a credit security freeze with Equifax, you must [request a temporary freeze lift](#) until you’ve successfully registered or the IRS won’t be able to verify your identity.

To print copies of your W-2’s:

- Visit the IRS website at www.irs.gov
- Click “Get Your Tax Record”
- Click Get Transcript Online.
- Click Get Started and follow the on screen instructions to create an online account with the IRS. You will need to access your email and have access to credit card information to verify your identity.
- Fill out the form with the same address where you resided in 2016.
- Under “Type of Transcript” select Wage and Income Transcript.
- Choose the 2016 tax year. When your transcript appears, please print a copy and attach to your Verification Worksheet.

If the electronic options don’t work: You can request that any of the above documents be mailed to you by calling **1-800-908-9946**. It generally takes 5-10 days for you to receive your paperwork via mail.

You also have the option to make an appointment with the IRS to get a copy of your tax return transcript, non-filer statement, or W-2’s in person. You can request an appointment by calling (844) 545-5640. You will then need to pick up your documents at the appointment time at the JFK Federal Building (7th Floor) 15 New Sudbury St. Boston, MA 02203. The hours of operation are Monday-Friday 8:30 a.m. to 4:30 p.m.