

Verification Worksheet Income Instructions

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

Did you work during 2015?

No, I did not work during 2015. Please check the box that says, “The student/parent was not required to file, because they had no income earned from work in 2015.”

Yes, I did work. If you worked and earned money during 2015, 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 2015.**

Yes, I did work, but not in the U.S. If you were working in a country other than the U.S. in 2015, 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 2015, 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 2015?

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 2015, 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. Please follow the instructions on printing W-2’s 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) *Provide a **signed** copy of your 1040 form. If you filed through an online service (Turbo Tax, Tax Act, etc.) you should be able to log into your account, print, and sign a copy of the 1040 form and return it to BHCC **OR***
- b) *Provide a paper copy of your 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 transcript.*

My marital status has changed since I filed my 2015 taxes. What do I need to do?

No change: Use your tax information as it appears on your 2015 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 2015.

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, 2016 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 2015 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
- Under “Tools” click on the “Get a Transcript” link.
- 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 2015 tax year.

To print copies of your IRS tax return transcript online:

- Visit the IRS website at www.irs.gov
- Under “Tools”, click on the “Get a Tax Transcript” link
- 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 2015 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 2015 tax year. When your tax return transcript appears, please print a copy and attach to your Verification Worksheet.

To print copies of your W-2’s:

- Visit the IRS website at www.irs.gov
- Under “Tools”, click on the “Get a Tax Transcript” link.
- 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 2015.
- Under “Type of Transcript” select Wage and Income Transcript.
- Choose the 2015 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.