

Verification Worksheet Income Instructions

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

Did you work during 2017?

No, I did not work during 2017. Please check the box that says, "The student/parent was not required to file, because they had no income earned from work in 2017, and is providing an IRS non-filer statement." Then go to www.irs.gov and print a non-filer statement. Follow the instructions on printing a non-filer statement on the other side of this page.

Yes, I did work. If you worked and earned money during 2017, 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 2017.**

Yes, I did work, but not in the U.S. If you were working in a country other than the U.S. in 2017, you still need to document your income. Please bring all income and tax information from the country where you were working to the Student Central 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 2017, 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 2017?

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 2017, 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 2017 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 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 2017 taxes. What do I need to do?

No change: Use your tax information as it appears on your 2017 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 2017.

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, 2018 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.

To use the IRS Data Retrieval Tool on the FAFSA:

- Log back into your 2019-2020 FAFSA using your FSA ID & password
- Click on the small blue link that says, "Make a FAFSA Correction"
- Create a Save Key for this session
- Once you are logged in, click on the Financial Information tab
 - o On this page, there are 3 questions that you must answer as "No" in order for the Data Retrieval Tool option to appear. Most people should

be able to answer no to these questions (Did you file an amended return? Did you file a Puerto Rican or foreign tax return? Did you file electronically in the last 3 weeks). Choose no.

- Click on the option to Link to IRS
- Now that you have connected to the IRS, fill out the form on the screen and then click Submit
- After your IRS data is matched, check off the option to Transfer, and then click on the Transfer, and then click on the Transfer Now button
- Once your tax information has been transferred, complete the rest of your FAFSA, Sign, and Submit. Please do not change any of the numbers transferred from the IRS.

To print copies of your IRS tax return transcript:

- 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 2017 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 2017 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 2017
- Under "Type of Transcript" select Wage and Income Transcript
- Choose the 2017 tax year. When your transcript appears, please print a copy and attach to your Verification Worksheet

To print an IRS non-filer statement:

- 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 2017
- Under "Type of Transcript" select Verification of Non-filing Letter
- Choose the 2017 tax year. When your letter 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.