

TAX RETURN FILERS

Complete this section if you and/or your spouse (*if applicable*) filed a 2015 income tax return with the IRS. As part of verification, the Financial Aid Office is required to collect your official tax data, either through the FAFSA IRS Data Retrieval Tool (DRT) or via an IRS Tax Return Transcript. A copy of your Tax Return (1040, 1040A, or 1040EZ) is *not* acceptable for verification purposes. You must complete one of the steps outlined in the chart below. **You and your spouse (if applicable) must attach a 2015 W2** (or equivalent form, such as an IRS 1099) for all income earned from work, even if you used the IRS Data Retrieval Tool or are attaching a Tax Return Transcript.

Student and Spouse (<i>if applicable</i>)
<ul style="list-style-type: none"> ○ I/we have successfully used the FAFSA's IRS Data Retrieval Tool to load and submit my income information onto the FAFSA.
<ul style="list-style-type: none"> ○ I/we have not yet, but will use the FAFSA's DRT to transfer my income information onto the FAFSA (<i>please note verification cannot be completed until this information is received</i>)
<ul style="list-style-type: none"> ○ I/we am unable or chose not to use the FAFSA's DRT to transfer my income information. I/we have either attached a copy of my 2015 Tax Return Transcript here, or I/we will request a copy of a Tax Return Transcript to be mailed to me/us and will then forward it to my Financial Aid Office.
<ul style="list-style-type: none"> ○ I/we filed an Amended IRS Income Tax Return. I/we will provide the following: <ul style="list-style-type: none"> ➢ a copy of my 2015 Tax Return Transcript ➢ a signed copy of the 2015 IRS Form 1040X
<ul style="list-style-type: none"> ○ I/we were the victim of IRS Identity Theft. I/we will provide the following: <ul style="list-style-type: none"> ➢ a Tax Return DataBase View (TRDBV) transcript ➢ a Statement of Tax-Related Identity Theft available at finaid.ucr.edu in the Forms and Appeals section.
<ul style="list-style-type: none"> ○ I/we filed a Foreign/Non-IRS Income Tax Return. I/we have attached a signed copy which has been translated into English (if applicable).
<ul style="list-style-type: none"> ○ I/we did not and am not required to file a 2015 Federal Tax Return and will complete the TAX RETURN NON FILERS Section on Page 3 of this form.

Please Note: The best way to verify income is by using the IRS Data Retrieval Tool (DRT) on the FAFSA. If you and your spouse (*if applicable*) have not already used the tool, go to FAFSA.gov, log in to the 2017-18 FAFSA record, select "Make FAFSA Corrections", and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2015 IRS income tax information into the FAFSA. After uploading tax data, **please be sure to submit the FAFSA**. For electronic Tax Filers, it takes up to **two weeks** for IRS information to be available for the DRT; for paper Tax Filers, up to **two months**.

To obtain a **free 2015 Federal Tax Return Transcript** directly from the IRS – not a photocopy of your tax return, go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, and request the "IRS tax return transcript". You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). Alternatively, you may call **1-800-908-9946** to obtain the form(s). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

TAX RETURN NON FILERS

Complete this section if you, the student and/or your spouse (*if applicable*) will not file and are not required to file a 2015 income tax return with the IRS, but earned income from work in 2015. More information about who is required to file can be found at www.IRS.gov. If you are required to file a return, but have not, you must file your return in order to be considered for Federal Student Aid. In the following table, please list all earnings from work during 2015 **and attach a 2015 W2 or 1099-MISC for each line item**. **Please Note:** Your application is not complete until all earnings from work can be verified with a W2 or 1099-MISC.

Source of Income from Work in 2015	Student	Spouse	IRS W-2 or 1099 Attached?
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Total Income from Work in 2015	\$	\$	XXXXXXXXXXXXXX

For both student and spouse (*if applicable*) non-tax filer(s), you must provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2016 that indicates a 2015 IRS income tax return was not filed with the IRS or other relevant tax authority. To obtain **Verification of Non-filing Letter**, go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, and request the letter. If appropriate, a similar confirmation from another taxing authority (e.g., a U.S. territory or a foreign government) is also acceptable.

- Check here if confirmation of non-filing letter is attached.
- Check here if confirmation of non-filing letter will be provided later.

CERTIFICATION AND SIGNATURES

If you are the student or spouse (*if applicable*), by signing this application you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide further documentation that will verify the accuracy of your completed form. Also, you certify that you understand that the Department of Education has the authority to verify information reported on this form with the Internal Revenue Service and other federal agencies. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

 Student Signature

 Date

 Spouse Signature (*if applicable*)

 Date

You may scan and submit your completed form by email to finaid@ucr.edu
 or by fax to (951) 827-5619
 or drop off at the Highlander One Stop Shop
 or mail to UC Riverside Financial Aid Office, 900 University Avenue, Riverside, CA 92521