

## Filing Status Worksheet (Instructions)

### Instructions for Tax-Filers

*To obtain an IRS tax return transcript, you can go to [www.irs.gov](http://www.irs.gov) and under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." Or you can call 1-800-908-9946.*

*Please note that if you are eligible to use the IRS Data Retrieval Tool to link your taxes to the FAFSA, that this option may limit any current and future request for verification and may result in a quicker resolution of your verification status.*

# 2017-2018 Dependent Filing Status Worksheet

PLEASE CHECK ONE FOR STUDENT & ONE FOR PARENT AND FOLLOW ALL INSTRUCTIONS

Student Last \_\_\_\_\_ Student First \_\_\_\_\_ Middle Initial \_\_\_\_\_ Student SSN \_\_\_\_\_

### 2015 Student Non-Filers

- I did not (and was not required to) file taxes in 2015 – I did not have any income earned from work in 2015.
- I did not (and was not required to) file taxes in 2015; however I was employed. Please complete information below and provide copies of all 2015 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2015 W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W-2 is unavailable

Employer's Name	2015 Amount Earned		IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00		Yes

### 2015 Student Federal Income Tax Filers

- I filed taxes in 2015 (**and**)
- I **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer my 2015 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
- I **am unable to use** the IRS Data Retrieval Tool, and I will submit copies of my 2015 Federal Tax return Transcript (*not a copy of the tax return form*) to my school.

### 2015 Parent Non-Filers

- My parents did not file 2015 Federal Taxes (nor were they required to do so) – Neither had any income from work in 2015
- My parents did not file 2015 Federal Taxes (nor were they required to do so); however, one (or both) was employed in 2015. Please complete information below and provide copies of all 2015 IRS W-2 forms issued. List all employers, even if the employer did not issue a 2015 IRS W-2 form. If you do not have W-2's, submit a signed/dated statement explaining why the IRS Form W-2 is unavailable

Employer's Name	2015 Amount Earned	Employee's name (mother/father)	IRS W-2 Provided?
Suzy's Auto Body Shop (example)	\$2,000.00	Mother	Yes

### 2015 Parent Federal Income Tax Filers

- My parent(s) filed taxes in 2015 (**and**)
- My parent(s) **has used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2015 IRS income information into my FAFSA (either on the initial FAFSA or a correction to the FAFSA)
- My parent(s) **is unable to use** the IRS Data Retrieval Tool, and I will submit copies of his or her 2015 Federal Tax return Transcript(s) (*not a copy of the tax return form*) to my school.
- My parents filed separately in 2015 and I will be providing 2015 Federal Tax Return Transcripts for each

### Special Circumstance:

- Check here if for the 2015 tax year, you- and/or your parents-were granted a filing extension, filed an amended tax form, were a victim of identity theft, or if you filed a non-IRS Income tax return. (If you check this box, we must have a completed "Verification of Unusual Tax Circumstances" form)*

## CERTIFICATION & SIGNATURE

Each person signing below certifies that all of the information reported is complete and correct

**WARNING: If you purposefully give false or misleading information you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student Signature (Required)

\_\_\_\_\_  
Date (Required MM/DD/YYYY)

\_\_\_\_\_  
Parent Signature (Required)

\_\_\_\_\_  
Date (Required MM/DD/YYYY)