

B. Student 2017 Tax and Income Information

Check only **ONE** box below:

Check here if you filed a 2017 U.S. Income Tax Return and used the IRS Data Retrieval Tool (DRT) to transfer your 2017 IRS U.S. Income Tax Return information into your FAFSA (DRT instructions below).

Check here if you filed a 2017 U.S. Income Tax Return but are unable to or choose not to use the IRS Data Retrieval Tool (DRT) to transfer your 2017 IRS U.S. Income Tax Return information into your FAFSA and instead have provided a 2017 IRS Tax Return Transcript (Transcript instructions below).

Check here if you filed an Amended U.S. Income Tax Return 2017 (1040X).

You must provide the following documentation:

- ✓ 2017 IRS Tax Return Transcript from the original form you filed
- ✓ Signed copy of the 2017 IRS Form 1040X "Amended U.S. Individual Income Tax Return" filed with the IRS

Check here if you did not earn any income and were not required to file a 2017 U.S. Income Tax Return.

You must provide the following documentation:

- ✓ "Verification of Non Filing Letter" from the IRS attesting that you did not file a 2017 IRS income tax return. You can obtain this online at <https://www.irs.gov/individuals/get-transcript> IRS Form 4506-T and checking box 7.

Check here if you earned income and received a 2017 W-2, but were not required to file a U.S. Income Tax Return.

You must provide the following documentation:

- ✓ Copy of your 2017 IRS Form W-2 for each source of employment.
- ✓ "Verification of Non Filing Letter" from the IRS attesting that you did not file a 2017 IRS income tax return. You can obtain this online at <https://www.irs.gov/individuals/get-transcript> IRS Form 4506-T and checking box 7.

Check here if you earned income but did not receive a 2017 W-2 and were not required to file an Income Tax Return.

You must provide the following documentation:

- ✓ "Verification of Non Filing Letter" from the IRS attesting that you did not file a 2017 IRS income tax return. You can obtain this online at <https://www.irs.gov/individuals/get-transcript> IRS Form 4506-T and checking box 7.
- ✓ List your employer(s) and income received in 2017:

Source of Income / Employer's Name	Amount Earned in 2017
	\$
	\$

C. High School Completion Status

Provide one of the following documents to indicate the student's high school completion status as of the time the student will begin college in 2019–2020:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.

C. High School Completion Status (continued)

- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If the student completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a homeschool setting.

If the student is unable to obtain the documentation listed above, they must contact our financial aid office.

D. Identity and Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed in our Financial Aid Office)

The student must appear in person at the University of Puget Sound to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Education Purpose provided below:

Statement of Educational Purpose

I certify that I _____ am the individual signing this
(Print Student's Name)

Statement of Educational Purpose and that the Federal student financial assistance that I may receive will only be used for educational purposes and to pay the cost of attending the University of Puget Sound for 2019-2020.

(Student's Signature)

(Date)

(Student's UPS ID Number)

E. Next Steps

Schools must verify FAFSA data with information provided directly from the IRS. If you checked that you have filed a 2017 U.S. Income Tax Return you must retrieve your IRS data using one of the following two options: IRS Data Retrieval Tool or requesting a Tax Return Transcript.

Option 1: IRS Data Retrieval Tool – FAST – EASY – ACCURATE

The easiest way to verify your FAFSA data with accurate tax information is by using the IRS Data Retrieval Tool:

- ✓ Log in at www.FAFSA.gov
- ✓ Click **Make FAFSA Corrections** located in the middle of the page.
- ✓ In the Financial Information section, answer the eligibility questions and click **Link to IRS**.
- ✓ **Proceed to IRS Site**, enter the requested information, and click **Submit**
- ✓ Review information retrieved from your tax return and click **Transfer Now**
- ✓ Complete the process on the Sign and Submit tab of your FAFSA

Option 2: Tax Return Transcript - If you do not want to use the IRS Data Retrieval Tool or you are not eligible to use the tool, you must provide a 2017 Tax Return Transcript along with this verification worksheet. Tax filers can request a free transcript of their 2017 tax return from the IRS via:

Get Transcript by Mail

- ✓ <https://www.irs.gov/individuals/get-transcript>
- ✓ Click "Get Transcript by Mail"
- ✓ Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- ✓ The transcript is generally received within 10 business days from the IRS's receipt of the online request.

Get Transcript Online

- ✓ <https://www.irs.gov/individuals/get-transcript>
- ✓ Click "Get Transcript Online."
- ✓ Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- ✓ To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan).
- ✓ The transcript displays online upon successful completion of the IRS's two-step authentication.

Telephone:

- ✓ Automated Telephone Request – 1-800-908-9946.
- ✓ Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

Paper Request Form:

- ✓ IRS Form 4506T-EZ <https://www.irs.gov/pub/irs-pdf/f4506tez.pdf>
- ✓ IRS Form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- ✓ The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

NOTE: If you are married and you and your spouse filed separately on your 2017 U.S. Income Tax Return, you must provide a 2017 IRS Tax Return Transcript for both you and your spouse in order to complete Verification.

F. Certification and Signature

By hand signing this form, you are certifying that all of the information reported on it is complete and correct.

Student Signature: _____ Date: _____

Warning: If you purposely give false or misleading information on this form, you may be subject to a fine, imprisonment, or both.