

2018–2019 Independent Student Verification Instructions

Financial Aid Department
 800 Main Street; room C-019
 Pewaukee, WI 53072
 262.691.5436 (Phone); 262.691.5123 (Fax)
 money@wctc.edu

Your 2018-2019 Free Application for Federal Student Aid (FAFSA) has been selected for verification. Verification is a process to ensure that all of the information entered into your FAFSA is correct. You are required to complete the *Independent Verification Worksheet on the next page and submit your (and your spouse's, if married) 2016 tax information.* Federal regulations require us to collect this documentation and complete the verification process before we can process a financial aid award for you for the 2018-19 award year. Your FAFSA will be corrected with any necessary changes as a result of this review process. Please read the following information on this page **and** the Verification Worksheet carefully.

If you and/or your spouse filed or are required to file a federal income tax return for 2016 **OR** had earned income in 2016, you will need to submit tax information for 2016 to the Financial Aid Department. **The Department of Education requires you and/or your spouse's tax information come directly from the IRS.** There are two options to obtain your tax information from the IRS. If you and/or your spouse filed a federal income tax return for 2016, you must use the IRS Data Retrieval Tool on the FAFSA website or contact the IRS for a Tax Return Transcript for 2016. If you and/or your spouse are not required to file a federal income tax return for 2016, but had earned income in 2016, you must contact the IRS for a Wage and Income Transcript for 2016. Instructions for both options are listed below.

Instructions to Use the IRS Data Retrieval Tool

- Go to www.fafsa.gov.
- Click **Login** and log in with your FSA ID and password.
- Click **Make a Correction/Update to Your FAFSA.**
- Navigate to the **Financial Information** section; update the tax completion status to "Already completed" if you have not done so yet.
- You will be prompted to answer two questions regarding your tax return. After doing so, click **LINK TO IRS.**
- Your FAFSA will be saved and you will be transferred to the IRS website. On the IRS website, **enter the requested information exactly as it appears on your tax return.**
- Once the IRS has validated your identification. Click the check box beneath the **Transfer My Tax Information into the FAFSA** and then click **Transfer Now.**
- You will be returned to the FAFSA website. **DO NOT MAKE ANY FURTHER UPDATES TO YOUR FINANCIAL INFORMATION.** Navigate to the **Sign and Submit** section.
- Enter your **FSA ID**, click the **Agree** button below the disclaimer box, and click **SUBMIT MY FAFSA NOW.** A new transaction of your FAFSA should be transmitted to the Financial Aid Office within a few days that will note that you have successfully used the IRS Data Retrieval Tool.

Instructions to Request Tax Return Transcript or Wage and Income Transcript from IRS

There are a variety of ways to contact the IRS to request a Tax Return Transcript or Wage and Income Transcript for 2016. You may have to wait to receive the Transcript through the mail. The methods and their wait times are listed below:

- **By website:** Visit www.irs.gov/Individuals/Get-Transcript. Will receive same day if requesting online view, will take 5-10 business days if requesting by mail.
- **By telephone:** Contact the IRS at 1.800.908.9946. Will take 10 business days by mail.
- **In person:** Visit the local IRS office in Milwaukee at 211 W. Wisconsin Ave. They are open Monday through Friday from 8:30 a.m. to 4:30 p.m. An appointment must be made. Call 1.844.545.5640 to schedule one.
- **Paper-request form (only available for a Return Transcript):** Complete and fax a 4506T-EZ request form directly to the IRS at 559.456.5876. 4506T-EZ request forms can be picked up at the WCTC Enrollment Center. It will typically take the IRS 4-6 weeks to process a 4506T-EZ request form.

Once you have received the Transcript, please submit it to the Financial Aid Department in person, by email to money@wctc.edu, or by fax to 262.691.5123.

If you did not file a 2016 federal tax return

Both the student and/or spouse are required to submit proof of non-filing from the IRS if a 2016 tax return was not filed. Follow the same instructions as above, but select "Verifications of Non-filing Letter" instead of transcript.

WAUKESHA COUNTY TECHNICAL COLLEGE

2018–2019 Independent Student Verification Worksheet

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A. Student Information

Last name	First name	M.I.	Student ID number
Address (include apt. number)		Email address	Birthdate
City	State	ZIP code	Phone number (include area code)

B. Household Information

1. List yourself below:

Full Name	Age	Name of College
		WCTC

2. List your spouse below, if you have one: Do not include your spouse if you are divorced, separated, or widowed. If your spouse will be attending college at least half-time and will be enrolled in a degree or certificate program between July 1, 2018 and June 30, 2019, write in the name of the college.

Full Name	Age	Relationship to Student

Read Carefully:

3. **List your children below** if you will provide more than half of their support from July 1, 2018 through June 30, 2019, even if they do not live with you. Do not include foster children.
4. **Include other people only** if they live with you and receive more than half of their support from you, and will continue to receive this support from July 1, 2018 through June 30, 2019.
5. **Write in the name of the college for those who will be attending college at least half-time** between July 1, 2018 and June 30, 2019 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship to Student	Name of College

6. If you or your spouse have children not listed as part of the household above that you paid child support for due to a legal requirement in 2016 please complete this section. Enter N/A if not applicable.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support was Paid	Amount of Child Support Paid in 2016



2018–2019 Independent Student Verification Worksheet *(continued)*

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C. Additional Information

Did anyone in Section B (Questions 1-5) of this worksheet receive SNAP (formerly known as Food Stamps) benefits in 2016 or 2017? You may be asked to provide documentation. Yes No

D. Student’s Tax Transcript and Income Information

1. Check **only one** box below:

- Check here if you used the **IRS Data Retrieval Tool** on the FAFSA and did NOT change the data retrieved by the IRS. This is the recommended method. Please see instructions on cover page.
- Check here if you are attaching your **2016 Federal IRS Tax Return Transcript**. A free Tax Return Transcript can be obtained from the IRS. Please see instructions on cover page.
- Non-Tax Filers: Check here if you will not file and are not required to file a 2016 U.S. Income Tax Return. If you earned income from work in 2016, **you must provide your 2016 Wage and Income Transcript and a “Verification of Non-Filing Letter.”** Please see instructions on cover page.

2. List any income you received in 2016 that was **not** reported on your federal tax return below:

Sources (e.g. child support, financial assistance, etc.)	2016 Income
	\$
	\$

E. Spouse’s Tax Transcript and Income Information

1. Check **only one** box below:

- Check here if you are not married.
- Check here if you and your spouse used the **IRS Data Retrieval Tool** on the FAFSA and did NOT change the data retrieved by the IRS. Please see instructions on cover page.
- Check here if you and your spouse are attaching your **2016 Federal IRS Tax Return Transcript**. If you and your spouse filed taxes separately, you must both submit a Tax Return Transcript.
- Non-Tax Filers: Check here if your spouse will not file and is not required to file a 2016 U.S. Income Tax Return. If your spouse earned income from work in 2016, **you must provide your 2016 Wage and Income Transcript and a “Verification of Non-Filing Letter.”** Please see instructions on cover page.

2. List any income your spouse received in 2016 that was not reported on their federal tax return below:

Sources (e.g. child support, financial assistance, etc.)	2016 Income
	\$
	\$

F. Sign This Worksheet *(Requires student signature; spouse signature is optional)*

Verification documents should be submitted within two weeks from the date you receive this worksheet. Loans cannot be certified if verification documents are submitted on or after your last date of attendance.

By signing this worksheet, you certify that all information reported to qualify for federal student aid is complete and correct.

WARNING: If you or your spouse purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student _____ Date _____ Spouse (optional) _____ Date _____

Return all required verification documents to the Financial Aid Department.

