University of Idaho

Student Financial Aid Services
P. O. Box 444291
Moscow, ID 83844-4291
PHONE: 208-885-6312
FAX: 208-885-5592
EMAIL: finaid@uidaho.edu
WEB: www.uidaho.edu/finaid

Office Use Only
Doc: _____VIP_____#14__
Tkg Grp: _____
Comp. Date: _____
Comp. By: _____

Parent Income Verification 2012-2013

Student: _____ Student ID or SSN: _____
Please Print
Today's Date:_____ Phone #: _____

Your file has been selected for verification of some of the information provided on the 2012-2013 FAFSA. In order for us to verify your parents' 2011 income and wage information, **they must provide information from one of the following categories**. Be sure to read this VERY carefully. **If you or your parents have questions, please contact our office.**

PARENT: Please check the appropriate box below and follow the instructions carefully.

A. ❑ **I HAVE FILED A 2011 FEDERAL INCOME TAX RETURN.**

Please submit **all** of the following:

1. A copy of your 2011 Federal Tax Transcript (see enclosed instructions); **AND**
2. Copies of ALL 2011 W-2 statements (form will be considered incomplete without W2s).

- **If you have not yet filed your tax return but plan to do so by the IRS deadline**, please submit a copy of your tax transcript as soon as possible. Delay may result in a reduction of available aid.
- **If you are married but did not file a joint tax return** with your spouse, you **must** submit copies of your spouse's 2011 tax transcript & W-2 form(s) as well as your own, **even if you were not married in 2011**.

B. ❑ **I AM A NON–FILER.** I am not required to file. I will not / have not filed a 2011 Federal income tax return.
YOU MUST complete the required Non-Filer's Statement on the page 2.

NEXT

C. ❑ **I AM AN EXTENSION FILER.**

Submit **all** of the following:

1. Photocopies of all extension forms that were filed with the IRS. If these forms were not submitted, please explain.
2. Photocopies of all W-2 forms for 2011 employment.
3. Completed estimate of your expected AGI (adjusted gross income) for 2011 and the expected federal tax from tax tables (not the amount withheld) – **see box at right**. You and your spouse (if you are married) must sign below.
4. As soon as you have filed your tax return, you **must** submit a copy of the federal tax transcript.
   - **Important Note: Any delay in sending us a copy of your tax transcript may result in delayed awarding and /or disbursing of your Student Financial Aid.**

Estimate of AGI and federal tax:
By signing below, I certify that my expected AGI of $_____ and federal tax of $_____, while estimated, are correct and true to the best of my knowledge.

CERTIFICATION: By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.

Parent Signature: _____ Date: _____

Parent Signature: _____ Date: _____

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Parent Income Verification 2012-2013
NON-FILER'S STATEMENT

Student: _____ Student ID or SSN: _____
Please Print
Today's Date: _____ Phone #: _____

- **Do not complete this non-filer's statement if you have filed or will file a 2011 tax return.** If you filed or will file a tax return for 2011, you must submit a copy of your tax transcript. See section A on page 1 of this form.
- **Even though** you may not be REQUIRED to file a tax return, **you must complete the following section.** Report any wages from part-time employment and attach photocopies of any W-2 wage statements. Do not include earnings from Federal Work-Study or any other types of financial aid.
- **In addition,** please list the amount and sources of ALL income you received during 2011, **for example**: unemployment compensation, child support, earned income, interest or dividend income, housing paid by another, cash gifts, etc.

Enter a zero or N/A under "Amount" if you did not work and /or had no income.
Leaving the "Amount" section blank is not an acceptable answer.

2011 Wages/Income for:	Amount Earned or Received		Names of Employers/Income Source
Father/Stepfather	$_____	from	_____
	$_____	from	_____
	$_____	from	_____
	Amount Earned or Received		**Names of Employers/Income Source**
Mother/Stepmother	$_____	from	_____
	$_____	from	_____
	$_____	from	_____

- **If little or no income is listed above**, please provide a brief explanation of how basic living expenses were paid in 2011. Were any of your expenses paid by another person? If yes, please explain.

_____

_____

_____

CERTIFICATION: By signing this worksheet, I (we) certify that all the information reported on it is complete and correct.

Parent Signature: _____ Date: _____

Parent Signature: _____ Date: _____

IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their 2011 tax return from the IRS in one of three ways. Please be sure to keep a copy of your transcript for your records.

1. Online Request

- Available on the IRS Web site at www.irs.gov
- In the **Tools** section of the homepage click "Order a Return or Account Transcript"
- Click "Order a Transcript" under #3
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click "Continue"
- In the **Type of Transcript** field, select "Return Transcript" and in the **Tax Year** field, select "2011".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

2. Telephone Request

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select "**Option 2"** to request an IRS Tax Return Transcript and then enter "**2011**".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

3. Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.

- Download at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf

- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.

- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.

  Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.
- On line 6, enter "2011" to receive IRS tax information for the 2011 tax year that is required for the 2012-2013 FAFSA.

- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.

- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.

- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.