University of Idaho

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Office Use Only
Doc: PASD #22
Tkg Grp: _____
Comp. Date: _____
Comp. By: _____

Parent Marital Status Correction/Update Form 2014-2015

Student: _____ Student ID or SSN: _____
Please Print

Today's Date: _____ Phone #: _____

_____ You informed us that your parent(s) have separated, divorced, or been widowed since you originally filed your FAFSA, or you mistakenly reported both parental incomes even though they were separated, divorced, or widowed at the time you filed your FAFSA.

_____ Parent: please submit a brief letter explaining the situation; including the date of separation, divorce, or death, and accompanying documentation (death certificates will be necessary).

_____ Please submit a copy of your parents' 2013 Federal Income Tax Transcripts (see enclosed instructions) AND copies of all of your parents' 2013 W-2s **(*your appeal will be considered incomplete without W-2s*).**

_____ Please complete the following questions (both sides) about the parent of record (the parent providing the information), so the FAFSA may be updated.

<u>Blank is NOT a valid answer</u> (enter a zero or N/A). Please sign page 2.

Section A: Untaxed Income Information for January 2013 – December 2013	**Amount**
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a though 12d, codes D, E, F, G, H, and S.	$
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – line 17.	$
Child support received for any children. **Do not include** foster care or adoption payments.	$
Tax-exempt interest income from IRS Form 1040–line 8b or 1040A-line 8b.	$
Untaxed portions of IRA distributions from IRS form 1040–lines (15a minus 15b) or 1040A – lines (11a minus 11b). **Exclude rollovers**. If negative, enter a zero here.	$
Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). **Exclude rollovers**. If negative, enter a zero here.	$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	$
Veteran's non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	$
Other untaxed income not reported, such as workers' compensation, disability, etc. **Do not include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	$
TOTAL	$

SECTION B: 2013 Income Exclusions	
1. Education credits (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 49 or 1040A-line 31.	$
2. Child support you PAID because of divorce or separation or as a result of a legal requirement. **Don't include:** support for children living in your household, as reported in the household size question 72 of the FAFSA.	$
3. Taxable earnings from need-based employment programs, such as Federal or State Work-Study and need-based employment portions of fellowships and assistantships.	$
4. Student grants and/or scholarship aid **reported to the IRS in your adjusted gross income.** Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. **Note:** This is **not** the total amount of grants and scholarships you received in 2013 (as reported on the 1098T) - it is the taxable amount of grants and scholarships you included on your tax return. If you enter an amount here it means: 1) that you filed a federal tax return and 2) you included grants and/or scholarships as part of the income reported on the tax return.	$
5. Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. **Don't include:** untaxed combat pay reported on the W-2 (Box 12, Code Q).	$
6. Earnings from work under a cooperative education program offered by a college.	$

SECTION C: Assets	
1. Cash, Savings and Checking Accounts (*as of today*). **Do not include financial aid**.	$
2. Current net worth (value minus debt) of investments, including real estate (not your home).*	$
3. Current net worth of business.**	$
4. Current net worth of investment farm.**	$
TOTAL	$

SECTION D: Household Size	
1. How many people are in your parent's household?***	
2. How many in the question above will be college students between July 1, 2014 and June 30, 2015?****	

Additional Directions for Section C

Net worth means current value minus debt. If net worth is negative, enter 0.

*Investments include real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, Coverdale savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. *Investment value* includes the market value of these investments as of today. *Investment debt* means only those debts that are related to the investments. **Do not include** the home you live in, the value of life insurance and retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) and prepaid tuition plans, cash, savings and checking accounts already reported.

**Business and/or investment (less than 100 employees) farm value includes the market value of land, buildings, machinery, equipment, and inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Additional directions for Section D

***Include in the **parent's household**:

- The student, and parent(s) (including stepparent) even if the student doesn't live with them;
- Your parents' other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2014 through June 30, 2015, **OR** (b) the children would be required to provide parental information when applying for federal student aid; and
- Other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2014 through June 30, 2015.

****Include the student completing the FAFSA. Do not include the parent. Include others only if they will attend at least half time in 2013-2014 in a program that leads to a college degree or certificate.

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

Parent Signature: _____ Date: _____

Tax Transcript Request from IRS

Tax filers can request a transcript of their tax return free of charge 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 for FREE on the IRS Web site at www.irs.gov
    - We suggest using Internet Explorer on PC or Google Chrome on Apple, and make sure to turn off pop-up blockers. If you are unable to make it work, please try a different browser.
- In the **Tools** section of the homepage click "Get Transcript of Your Tax Records"
- Choose to receive the Transcript Online or by Mail – Online is faster; we will accept either one.
- Follow the instructions to order a **2013 Tax Return Transcript.** If you are receiving the transcript online, you may need to make an account on the IRS website.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS. If receiving the online copy, you will need to save and email it to us in addition to any requested forms, or print and send it by fax or mail.

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 correct year.
- 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. Please do not use this option, as we may have difficulty matching an incoming IRS Tax Return Transcript to the student aid applicant.
- On line 6, enter correct year to receive IRS tax information for the year that is required for the 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.