

Important Income Information for Tax Filers

IRS DATA RETRIEVAL: Best way to verify income because UC is updated with how you used the IRS Data Retrieval Tool within FAFSA on the Web.

- Go to www.FAFSA.gov, log into the FAFSA record, select “Make FAFSA Corrections,” and navigate to the student and parent financial sections.
- If eligible to complete the process, use the IRS Data Retrieval to transfer 2011 IRS income tax information to the FAFSA for both student and parent.
- When using IRS Data Retrieval, do not modify income after transferring it to the FAFSA. If modified, Transcript option will be required.

IRS TAX RETURN TRANSCRIPT: If you are unable or choose not to use the IRS Data Retrieval Tool, an IRS Tax Return Transcript will be required.

- Go to www.IRS.gov and use the “Order a Return or Account Transcript” link or call 1-800-908-9946.
- Make sure to request a *Return* Transcript, not an *Account* Transcript.
- SSN, date of birth, and address used on the taxes needed for each tax filer when making the request. IRS will only send transcripts to address on file.
- Married persons filing separate tax returns (or newly single who filed jointly) must use Transcript option to request tax info for both parents.
- Original (not photocopy) of transcripts must be submitted with this verification worksheet.

C. Student’s Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page and check only one of the boxes.

- IRS Data Retrieval in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (on either on the initial FAFSA or when making a correction) and no modification of the income data has since been made.
- Student unable or chooses not to use the IRS Data Retrieval Tool so original 2011 IRS tax return transcript is attached.
- Student filed an amended return so originals of the 2011 IRS tax transcript or signed copy of tax return *and* 2011 signed copy of 1040X are attached.
- Student attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.

(Extension filing will require completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to UC.)

2. **TAX RETURN NON-FILERS:** Complete this section if student will not file and is not required to file a 2011 income tax return with the IRS.

- Student not employed and had no income earned from work in 2011.
- Student employed and completed info. Every employer, even if they didn’t issue a W-2, must be listed, and W-2s must be provided if issued.

Employer’s Name	2011 Income	W-2 Attached?
	\$	
	\$	
	\$	
	\$	

D. Parent(s)’ Income and Other Information

1. **TAX RETURN FILERS:** Review information at the top of this page and check only one of the boxes.

- IRS Data Retrieval in FAFSA on the Web was used to retrieve and transfer IRS income information for the parent(s) (on either on the initial FAFSA or when making a correction) and no modification of the income data has since been made.
- Parent(s) unable or choose not to use the IRS Data Retrieval Tool so original 2011 IRS tax return transcript(s) are attached.
- Parent(s) filed an amended return so originals of the 2011 IRS tax transcript or signed copy of tax return *and* 2011 signed copy of 1040X are attached.
- Parent(s) attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below.

(Extension filing will require completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to UC.)

2. **TAX RETURN NON-FILERS:** Complete this section if parent(s) will not file and are not required to file a 2011 income tax return with the IRS.

- Parent(s) not employed and had no income earned from work in 2011.
- Parent(s) employed and completed info. Every employer, even if they didn’t issue a W-2, must be listed, and W-2s must be provided if issued.

Employer’s Name	2011 Income	W-2 Attached?
	\$	
	\$	
	\$	
	\$	

3. **OTHER VERIFIED INFORMATION:** Complete this section if applicable; further documentation may be required.

- One of the persons listed in Section B (Family Information) of this worksheet received SNAP (formerly known as food stamp) benefits in 2010 or 2011.
- Child support was paid in 2011. Details are noted below and payer of child support is one of the signatures (Section E).

Person who Paid Child Support	Person to Whom Support Paid	Child Supported by Payment	2011 Amount Paid
			\$
			\$
			\$
			\$

E. Certification and Signatures

By signing this worksheet, we certify that all the information reported on it is complete and correct. At least one parent must sign (including the payer of any child support noted in Section D above).

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

Student _____ Date _____

Parent _____ Date _____

Do not mail this worksheet to the U.S. Department of Education. Mail, fax, or take it to the University of Cincinnati. You should make a copy of this worksheet for your records.

**Student Financial Aid Office
University of Cincinnati
PO Box 210125
Cincinnati, OH 45221-0125**

**One Stop Student Services Fax
220 University Pavilion (513) 556-9171**

VERIFICATION PROCESS

■ AID PROCESSING CANNOT CONTINUE UNTIL PAPERWORK IS SUBMITTED.

selection and submission

- A percentage of all aid applicants are selected for federal verification. It is a generalized quality assurance program and does not reflect a specific concern with your aid application.
- Students selected for verification must complete the verification worksheet and return it along with required documents.
- Because tax information must be verified with IRS information on file, completion of the verification process may be delayed if you have not filed the appropriate taxes. Always file taxes early when applying for federal financial aid.
- **Copies of taxes are no longer accepted to verify income information.** The IRS Data Retrieval process via FAFSA on the Web (making no changes to income data once transferred) must be utilized *or* IRS Tax Return Transcripts must be supplied (unless you have amended taxes).

review paperwork prior to submitting

- Please review household information to ensure those persons you have listed qualify based on the instructions on the verification worksheet.
- Be sure to report any received earnings (if a tax non-filer), SNAP benefits, and child support paid on page 2 of the verification worksheet.
- Include the student SSN or UCID on attached documents. Double check that the verification worksheet includes the proper signatures.

financial aid award

- Your submitted documents will be compared to your aid application, and UC will make any required adjustments with the federal processor. As such, verification processing by UC can take several days to complete once documents have been submitted.
- You can continue to monitor your aid status at www.financialaid.uc.edu or www.onestop.uc.edu using the “check my aid” link.
- Once complete, your financial aid award will be displayed online for you to accept or decline as desired.

THANK YOU FOR SUBMITTING REQUESTED PAPERWORK IN A TIMELY MANNER.



Student Financial Aid Office

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PO Box 210125
Cincinnati, OH 45221-0125

(513) 556-9171 fax
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www.financialaid.uc.edu

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