



# Ogeechee Technical College

Office of Financial Aid  
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 Statesboro, GA 30458  
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## Independent Student Tax and Income Verification Worksheet

Form: **IVT117**  
 Aid Year: 2017-2018

Please **Type** or **Print** clearly.

### Student Information:

_____	_____	_____	_____
Last Name	First Name	MI	Telephone Number
_____	_____	_____	_____
Social Security Number	OTC – Student ID Number	Date of Birth	

**Federal Student Aid Programs:** Your application was selected for review in a process called "Verification." In this process, the Office of Financial Aid will be comparing information from your FAFSA application with your (and your spouse's) financial documents. We are required to review your FAFSA information under financial aid program rules (34 CFR, Part 668). The law states we have the right to ask you for this information before awarding Federal Aid. If there are differences between your application information and your financial documents, corrections to your FAFSA may be required.

### Student Tax and Income Information

For a faster alternative to requesting the IRS Tax Return Transcript, you can correct your FAFSA online by going to [www.fafsa.gov](http://www.fafsa.gov) and use the IRS Data Retrieval Tool.

Check ONE box and then refer to the right column.		Additional Documentation Required:	
<input type="checkbox"/>	I used the IRS Data Retrieval Tool on the FAFSA. If you used the IRS Data Retrieval Tool, <i>and did not change the information retrieved</i> , you do not need to submit a 2015 Federal Tax Return Transcript.		Do <b>not</b> submit tax transcript unless requested by our office.
<input type="checkbox"/>	I am attaching my <b>2015 IRS Tax Return Transcript</b> . Ogeechee Tech will not accept copies of tax returns.		<b>2015 IRS Tax Return Transcript.</b>
<input type="checkbox"/>	I filed an amended 2015 Tax Return. If you selected this option, you must submit a Tax Return Transcript and a signed copy of your 1040X.		<b>Signed copies of both the 2015 IRS Tax Return AND IRS Tax Form 1040X</b>
<input type="checkbox"/>	I did not file a 2015 Tax Return <b>AND</b> I am not required to file a Tax Return. If you selected this option, list your employer(s) and income earned and a Verification of Non-Filing Letter from the IRS.		<b>Request Verification of Non-Filing Letter from IRS Using Form 4506-T</b>
<b>Employer</b>	<b>Earnings/Income</b>	<b>Employer</b>	<b>Earnings/Income</b>
	\$		\$
	\$		\$
	\$		\$

The student and spouse, if married, were not employed and had no income earned from work in 2015 but had other sources of income. Please provide sources and amounts of other income.

STUDENT	Enter YEARLY Amounts
\$	Unemployment Compensation
\$	Social Security Benefits
\$	Child Support Received
\$	Alimony Received
\$	Workman's Compensation: Withdrawals from savings accounts, retirement
\$	Other: Incarcerated _____; Lived in shelter _____; Lived with relatives _____ (Whom _____)

### Certification and Signature

Each person signing below certifies that all of the information reported is complete and correct. The student (and one parent whose information was reported on the FAFSA, if a dependent student) must sign and date.

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

\_\_\_\_\_  
 Student's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Spouse's Signature

\_\_\_\_\_  
 Date

**Do not mail this form to the Department of Education. Submit this worksheet to the Office of Financial Aid!**

As set forth in its student catalog, Ogeechee Technical College does not discriminate on the basis of race, color, creed, national or ethnic origin, sex, religion, disability, age, political affiliation or belief, genetic information, veteran status, or citizenship status (except in those special circumstances permitted or mandated by law). The following person(s) has been designated to handle inquiries regarding the non-discrimination policies: Title IX Coordinator, Office 193, Joseph E. Kennedy building, 912.871.1885, [titleix@ogeecheetech.edu](mailto:titleix@ogeecheetech.edu); ADA/Section 504 Coordinator, Office 189, Joseph E. Kennedy building, 912.486.7211, [adacoordinator@ogeecheetech.edu](mailto:adacoordinator@ogeecheetech.edu); One Joseph E. Kennedy Boulevard, Statesboro, GA 30458. Ogeechee Technical College is a unit of the Technical College System of Georgia. Revised 5/8/17

## Verification of 2015 IRS Federal Income Tax Return Information

*The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at [www.fafsa.gov](http://www.fafsa.gov).* In most cases, no further documentation is needed to verify 2015 IRS income tax return information that was transferred into the student's FAFSA using the IRS DRT, **if that information was not changed**. If a student or parent changes his/her tax information on the student's FAFSA application after the original data was successfully matched with the IRS, Ogeechee Technical College will require the student to submit a 2015 Federal Tax Return Tax to verify if a correction needs to be made to the student's FAFSA.

In most cases, for electronic filers, 2015 IRS income tax return information for the IRS DRT is available within 2-3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available from the IRS DRT within 8-11 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the Office of Financial Aid, if more information is needed about using the IRS DRT.

Tax filers can request from the IRS an IRS Tax Return Transcript or an IRS Tax Account Transcript of their 2015 IRS tax return, free of charge, in one of the following ways:

- **Online Request:** Available on the IRS Website at [www.irs.gov](http://www.irs.gov)
- **Telephone Request:** Available from the IRS by calling (800) 908-9946 or (800) 829-1040
- **Paper Request Form – IRS Form 4506-EZ used to request an IRS Tax Return Transcript:** The form is available in the OTC Office of Financial Aid or by downloading from [www.irs.gov](http://www.irs.gov). Mail or fax the completed IRS Form to the appropriate address (or FAX number) provided on page 2. Tax filers can expect to receive
- **Paper Request Form – IRS Form 4506-T used to request an IRS Tax Account Transcript or IRS Record of Account:** The form is available in the OTC Office of Financial Aid or by downloading from [www.irs.gov](http://www.irs.gov). Mail or fax the completed IRS Form to the appropriate address (or FAX number) provided on page 2.

### Other Notes:

#### Individuals Granted a Filing Extension by the IRS:

If an individual is required to file a 2015 IRS Income tax return and has been granted a filing extension by the IRS, the individual must provide a copy of the IRS Form 4868, W-2 Forms, and if self-employed, a signed statement certifying the amount of the individual's AGI and U.S. Income taxes paid for tax year 2015

#### Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015 provide both of the following: A signed copy of the original 2015 IRS income tax return that was filed with the IRS, or a **2015 IRS Tax Return Transcript** (signature not required) for the 2015 tax year; and a signed copy of the 2015 IRS Form 1040X "Amended U.S. Individual Tax Return" that was filed with the IRS.

#### Individuals Who Were Victims of IRS Identity Theft

A victim of IRS identity theft who has been unable to obtain a 2015 IRS Tax Return Transcript or use the IRS DRT, must provide a signed copy of the 2015 paper IRS income tax return that was filed with the IRS and a signed copy of IRS Form 14039 "Identity Theft Affidavit", if one was submitted to the IRS. If the individual was not required to submit one, he or she may provide a statement signed and dated by the individual indicating that he or she was a victim of IRS identity theft and that the IRS is investigating the matter. The statement must also indicate that the individual submitted a Form 14039 to the IRS, but did not keep a copy of it or that he or she was not required to file the form or a copy of a police report, if it was filed, related to the IRS identify theft.