Student's Name _____ GCC ID# _____

2013-2014 Verification Worksheet — INDEPENDENT

Federal and State Student Aid Programs

Your application was selected for review in a process called "Verification". In this process, the Financial Aid Office will be comparing information from your FAFSA or CA Dream Application (if AB540) with an IRS 2012 Federal Tax Return Transcript, W-2 forms and other documents. Under the law, the college has the right to ask you for this information before awarding federal and state aid.

Complete this verification form and submit it to the Financial Aid Office (SF110) as soon as possible, so that your financial aid won't be delayed.

If there are differences between your application information and your financial documents, the Financial Aid Office will make the corrections electronically to have your information reprocessed.

What you should do

1. If required, request a 2012 tax return transcript for you and your spouse (if married) from the IRS. Instructions for requesting the tax return transcript are included.
2. Fill in and sign the worksheet.
3. **Do not leave any section blank.** If you (or your spouse) did not receive income from one of the sources of untaxed income, put a "0" for the amount.
4. Submit the completed worksheet, IRS tax return transcript, and any other documents listed on your "To Do List" on MyGCC to the Financial Aid Office.

If additional information is required, you will be notified via email.

The Financial Aid Office must review the requested information, under the financial aid program rules (34 CFR, Part 668).

A. Family Information

List the people in your household, include:

- yourself
- your spouse (if married)
- your children, if you will provide more than half of their support from July 1, 2013 through June 30, 2014
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2013 through June 30, 2014

Write the names of all household members. Also write in the name of the college for any household member, who will be attending college at least half-time between July 1, 2013 and June 30, 2014, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

First and last name of family member	Age	Relationship to Student	Will enroll in **COLLEGE** in at least 6 units in 2013-2014 year?	Name of **COLLEGE** the person will attend in 2013-2014 school year	If GCC student, list ID# **(REQUIRED)**
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		
			☐ YES ☐ NO		

B. Student's Housing Information (check only ONE box)

☐ I am married and live with my spouse and we pay $ _____ per month for mortgage/rent.

☐ I live with my parents.

☐ I live with a friend or relative (other than my parents) and I do not pay rent.

☐ I live by myself or with roommates/my children and I pay $ _____ per month as my share of the rent.

C. Student's Tax Forms and Income Information (all applicants)

1. Check one box only. Tax returns include the 2012 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

   ☐ I did file a 2012 Federal tax return (if the Student 2012 Tax Transcript is listed on your "To Do List" on MyGCC as a required item, the transcript with your 2012 W-2's must be attached).

   ☐ I did not file and am **not required** to file a 2012 Federal tax return.

2. List below any money you received from sources either in the United States or another country. **Do not list any income included on your 2012 Federal Tax Return**. Include all other sources of income (such as part-time work, babysitting, etc.). If you did not receive income from one of the sources of untaxed income, put a "0" for the amount.

SOURCES OF UNTAXED INCOME	**2012 AMOUNT** Jan. 1 through Dec. 31, 2012
Child Support (due to divorce or separation)	$ _____
Income from Work (**not reported on your tax return**) _____ (sources/employers)	$ _____
Money from Foreign Governments, Foreign Income, Relatives and/or Friends	$ _____
Other (such as CAPI, disability etc.): _____	$ _____

D. Spouse's Tax Forms and Income Information

1. Check one box only. Tax returns include the 2012 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

   ☐ My spouse did file a 2012 Federal tax return (if the Student 2012 Tax Transcript is listed on your "To Do List" on MyGCC as a required item, the transcript with your spouse's 2012 W-2's must be attached).

   ☐ My spouse did not file and is **not required** to file a 2012 Federal tax return.

2. List below any money your spouse received from sources either in the United States or another country. **Do not list any income included on their 2012 Federal Tax Return**. Include all other sources of income used to pay their living expenses. If your spouse did not receive income from one of the sources of untaxed income, put a "0" for the amount.

SOURCES OF UNTAXED INCOME - *not listed in Section C above*	**2012 AMOUNT** Jan. 1 through Dec. 31, 2012
Child Support (due to divorce or separation)	$ _____
Income from Work (**not reported on their tax return**) _____ (sources/employers)	$ _____
Money from Foreign Governments, Foreign Income, Relatives and/or Friends	$ _____
Other (such as CAPI, disability, etc.): _____	$ _____

E. Explanation

If your income is low, you must explain how all family living expenses were met in 2012. If more room is needed, use a separate sheet of paper.

_____

_____

_____

F. Sign this Worksheet

CERTIFICATION: I certify that all information on this form is true, complete, and accurate. Upon request, I agree to provide proof of the information reported on this form. False statements or misrepresentation can be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA or CA Dream Application based on forms and/or documents submitted.

_____ _____

Student's Signature Date

FINANCIAL AID OFFICE

IRS Request for 2012 Transcript of Tax Return

If you filed a 2012 federal tax return with the IRS, you may be eligible to use the **IRS Data Retrieval Tool***, which is the best and easiest way to provide accurate tax information. With just a few simple steps you can view information from your IRS tax return and transfer that information directly into your 2013-2014 FAFSA (fafsa.gov). If you transfer the data from the IRS to your FAFSA, you will not be required to provide a transcript of tax return. Once our office receives verification that the information was retrieved from the IRS (and remains unchanged), the IRS Tax Transcript requirement will be waived. For married students, this option is available only if you and your spouse filed a joint tax return.

**The IRS Data Retrieval Tool option is currently not available for students who completed the CA Dream Application. You must provide a copy of the 2012 Transcript of Tax Return from the IRS*.

A separate transcript is needed for each tax return filed

If listed on your "To Do" list on MyGCC you and your spouse (if married) are required to provide a 2012 Transcript of Tax Return from the IRS to verify income information provided on your FAFSA or CA Dream Application (if AB540). A **transcript of tax return** shows most line items from your federal tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes you, your representative or the IRS made after the return was filed. **If you are married but filed separate federal tax returns in 2012, we need a tax transcript for you and your spouse.** If you and/or your spouse (if married) are not eligible or choose not to use the IRS Data Retrieval Tool you have several options for providing this information.

- Obtain a transcript online at IRS.gov. Click on "Get Transcript for My Tax Records" and then click on "Get Transcript ONLINE". Provide the required information to create an account and then click on "**2012**" under "**Return Transcript**". Bring in a printout of the transcript once it is displayed on your screen.

  Online requests can also be processed if you want the transcript mailed to you. Click on "Get Transcript for My Tax Records" and then click on "Get Transcript by MAIL". Provide the required information and select "Return Transcript" for Type of Transcript and "2012" for Tax Year. The transcript will be sent to the address on file with the IRS, and you should allow 5-10 days to receive it. Online requests cannot be processed if you need the transcript mailed to an address other than the one the IRS has on file for you.

OR

- Fill out the Short Form Request for Individual Tax Return Transcripts (Form 4506T-EZ). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf and complete the form. For question #6 enter "2012". Be sure the taxpayer signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**If you filed an individual return and lived in**" on page 2 of the 4606T-EZ or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- If you need information from other IRS forms, such as Form W-2 or Form 1099, you can use the Request for Transcript of Tax Return (Form 4506-T). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506t.pdf and complete the form. For question #9 enter "2012". Be sure the taxpayer signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1010)**" on page 2 of the 4506-T or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- Call the IRS at **(800) 908-9946** and order a Transcript of Tax Return for 2012.