

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2015 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student, filed or will file a 2015 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2015 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2015 IRS income information into the student's FAFSA once the student has filed a 2015 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2015 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
 - Check here if the student's IRS tax return transcript is attached to this worksheet.
 - Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

2. TAX RETURN NONFILERS—complete this section if the student will not file and is not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- The student was not employed and had no income earned from work in 2015. The student must submit a letter of non-filing from the IRS. In addition, the student must submit a 2017-18 Tax and Earnings Statement. *To obtain a letter of non-filing, go to www.IRS.gov and click on the "Get a Transcript" link, or call 1-800-908-9946. The student will need his or her Social Security Number, date of birth, and the address on file with the IRS. The Tax and Earnings Statement is available online at <https://www.usm.edu/financial-aid/verification>.*
- The student was employed in 2015. Attach copies of all 2015 IRS W-2 forms issued to the student by employers. If 2015 w-2's were not issued, the student must submit a 2017-18 Tax and Earnings Statement. The student must submit a letter of non-filing from the IRS. *To obtain a letter of non-filing, go to www.IRS.gov and click on the "Get a Transcript" link, or call 1-800-908-9946. The student will need his or her Social Security Number, date of birth, and the address on file with the IRS. The Tax and Earnings Statement is available online at <https://www.usm.edu/financial-aid/verification>.*

D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—**Important Note:** If the student's parent(s), filed or will file, an amended 2015 IRS tax return the student's financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the student's parent(s) filed or will file a 2015 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.*

Check the box that applies:

- The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2015 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2015 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*
- The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2015 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript go to www.IRS.gov and click on the "Get a Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2015 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2015 tax returns were filed, 2015 IRS tax return transcripts must be submitted for each parent.*
 - Check here if an IRS tax return transcript(s) is attached to this worksheet.
 - Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—complete this section if the student's parent(s) will not file and is not required to file a 2015 income tax return with the IRS.

Check the box that applies:

- The parent(s) was not employed and had no income earned from work in 2015. Submit a letter of non-filing from the IRS for each parent whose information is on the FAFSA. In addition, each parent must submit a separate 2017-18 Tax and Earnings Statement. *To obtain a letter of non-filing, go to www.IRS.gov and click on the "Get a Transcript" link, or call 1-800-908-9946. The parent(s) will need his or her Social Security Number, date of birth, and the address on file with the IRS. The Tax and Earnings Statement is available online at <https://www.usm.edu/financial-aid/verification>.*
- The parent(s) was employed in 2015. Attach copies of all 2015 IRS W-2 forms issued to the parent(s) by employer(s). If 2015 w-2's were not issued, each parent must submit a separate 2017-18 Tax and Earnings Statement. Submit a letter of non-filing from the IRS for each parent whose information is on the FAFSA. *To obtain a letter of non-filing, go to www.IRS.gov and click on the "Get a Transcript" link, or call 1-800-908-9946. The parent(s) will need his or her Social Security Number, date of birth, and the address on file with the IRS. The Tax and Earnings Statement is available online at <https://www.usm.edu/financial-aid/verification>.*

Student's Name: _____ Student ID: _____

Untaxed and Other Sources of Income Worksheet

Documentation of benefits, including denial or ineligibility for benefits, may be requested after review of the information you provide.

****PLEASE DO NOT LEAVE ANY BLANKS. ENTER "0" IF NOT APPLICABLE.****

Student	Additional Income:	Parent
\$	Education credits (Hope, Lifetime Learning, and American Opportunity tax credits) from the IRS Form 1040 (line 50) or 1040a (line 33). (2015 federal taxes).	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Include AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income.	\$
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.	= \$
Student	Untaxed Income:	Parent
\$	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 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S. (2015 W2 forms).	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040, line 28 + line 32, or 1040A, line 17. (2015 federal taxes)	\$
\$	Child support received for all children. Don't include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040, line 8b or 1040A, line 8b. (2015 federal taxes)	\$
\$	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. (2015 federal taxes).	\$
\$	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. (2015 federal taxes).	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	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 in items 45a through 45h for student and 94a through 94h for parent, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040-line 25. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.	= \$

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, prosecuted for fraud, sentenced to jail, and/or face other charges, and will have to repay any financial aid funds you received.

If needed please provide explanation or comments on any other untaxed income reported above:

Student's Name: _____ Student ID: _____

E. Money Received or Paid on the Student's Behalf

So that we can fully understand the student's family's financial situation, please provide below information about any other resources, benefits, and other amounts received by the student and any members of the student's household. List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. This may include items that were not required to be reported on the FAFSA or other forms. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions. Do not include support from the custodial parent whose information is already reported on the student's 2017-2018 FAFSA. Please note that support also includes distributions to the student from a 529 plan not owned by the student or custodial parent.

If you need more space, attach a separate page that includes the student's name and Student ID at the top.

Purpose: e.g., Cash, Rent, Books	Amount Received in 2015	Source
<i>Utility and Rent (example)</i>	<i>\$500.00</i>	<i>Uncle Tommy Lee Jones</i>

F. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent 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

Parent's Signature

Date

You should make a copy of this worksheet for your records. This completed worksheet may be submitted by fax, scanned and emailed, or U.S postal mail to the appropriate campus listed below:

The University of Southern Mississippi Office of Financial Aid 118 College Drive Box 5101 Hattiesburg, MS 39406-0001 Phone: 601.266.4774 Fax: 601.266.5769	The University of Southern Mississippi Office of Financial Aid 730 East Beach Blvd Long Beach, MS 39560 Phone: 228.865.4513 Fax: 228.214.5415
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