

**A. Student Information**


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<i>Last Name</i>	<i>First Name</i>	<i>Student ID Number (starts C00...)</i>
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<i>Street Address</i>	<i>City</i>	<i>State</i>	<i>ZIP code</i>
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<i>Phone Number (Include Area Code)</i>	<i>Date of Birth</i>	<i>Email Address</i>
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**B. Household Members and Number in College**

 List all of the people in your custodial parent(s)' household below. Include:

- Yourself and your custodial parent(s), (including a stepparent) even if you do not live with your parent(s)
  - Do not include non-custodial parent information
- Your parent(s)' other children, if your parent(s) will provide more than half of their support, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.

**Note about Current College Enrollment:**

 Include the name of the college for any household member, excluding your parent(s), who is, or will be, enrolled at least half time in an undergraduate or graduate degree, diploma, or certificate program at any time between July 1, 2018, and June 30, 2019. *If more space is needed, attach a separate page with the student's name and Columbia ID Number at the top.*

Full Name	Age	Relationship	Name of College for the 2018-2019 Academic Year	Undergraduate/Graduate	Half-time/Full-time	Expected Graduation Date (mm/yy)

 By signing this worksheet, I certify all the information reported is complete and correct. The student and at least one custodial parent must sign. **Electronic signatures are NOT acceptable.**


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<i>Student Signature</i>	<i>Date</i>	<i>Student ID Number</i>
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<i>Custodial Parent Signature</i>	<i>Date</i>	<i>Custodial Parent Name (Please Print)</i>
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### C. Student's Income Information

Complete this section if the student filed a 2016 IRS income tax return.

**Check the box that applies:**

- The student has used the IRS Data Retrieval Tool to transfer 2016 IRS income tax return information to the student's FAFSA. *If you need more information about when, or how, to use the IRS Data Retrieval Tool, please go to <http://cc-seas.financialaid.columbia.edu/content/irs-drt>*
- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2016 IRS income tax return information into the student's FAFSA. *Our Office cannot complete verification until IRS information has been transferred to the student's FAFSA.*
- The student is unable or chooses not to use the IRS DRT to transfer information from the IRS to the FAFSA, and instead will provide the school with a **2016 IRS Tax Return Transcript**.

Complete this section if the student will not file and is not required to file a 2016 income tax return with the IRS.

**Check the box that applies:**

- The student was not employed and had no income earned from work in 2016.
- The student was employed in 2016.
  - ❖ List below the names of all employers and the amount earned from each employer in 2016. Please attach copies of 2016 W-2 statements or 1099-MISC forms, if not already submitted. *If more space is needed, attach a separate page with the student's name and Columbia ID Number at the top.*

Employer's Name	IRS W2 or Equivalent Document Provided?	Annual Amount Earned in 2016
<b>Total Amount of Income Earned from Work</b>		<b>\$</b>

Please refer to IRS Guidelines to confirm Tax Filing Requirements: <https://www.irs.gov/publications/p501/>. US Citizens and US Permanent Residents who are claimed as a dependent on another taxpayer's federal tax return must file their own federal tax return if 2016 earned income exceeds \$6,300.

Please note, in accordance with [Federal Register / Vol. 82, No. 86](#), dependent students who did not file a 2016 federal tax return do NOT need to provide any additional IRS documentation confirming non-filing tax status.

### D. Parent(s)' Income Information

Complete this section if the parent(s) filed or will file a 2016 IRS income tax return(s). **Important Note:** The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2016 or had a change in marital status after December 31, 2016.

- If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.
- If the parents filed separate 2016 IRS income tax returns, the IRS DRT cannot be used and the 2016 IRS Tax Return Transcript(s) must be provided for each.
- If the student's parent(s) filed an amended 2016 IRS tax return, the student's parents must review Page 4 of this worksheet for further instructions
- If the student's parent(s) filed a non-US tax return, or is not required to file a foreign tax return, they must review Page 4 of this worksheet for further instructions.

**Check the box that applies:**

- The parent(s) have used the IRS Data Retrieval Tool to transfer 2016 IRS income tax return information to the student's FAFSA. *If you need more information about when, or how, to use the IRS Data Retrieval Tool, please go to <http://cc-seas.financialaid.columbia.edu/content/irs-drt>*
- The parent(s) have not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2016 IRS income tax return information to the student's FAFSA. *Our Office cannot complete verification until IRS information has been transferred to the student's FAFSA.*
- The parent(s) is unable or chooses not to use the IRS Data Retrieval Tool, and the parent(s) will submit to the student's school a copy of the parent's **2016 IRS Tax Return Transcript(s)**—not photocopies of the 2016 income tax return.

Complete this section if the student's parent(s) will not file and is not required to file a 2016 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 2016.
- One or both parents were employed in 2016.
  - ❖ List below the names of all employers and the amount earned from each employer in 2016. Please attach copies of 2016 W-2 statements or 1099-MISC forms, if not already submitted. *If more space is needed, attach a separate page with the student's name and Columbia ID Number at the top.*

Employer's Name	IRS W2 or Equivalent Document Provided?	Annual Amount Earned in 2016
<b>Total Amount of Income Earned from Work</b>		<b>\$</b>

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority.

- Check here if IRS Verification of Non-filing Letter is attached.
- Check here if Verification of Non-filing will be provided later: <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> (Request option 7; most requests will be processed within 10 business days)

## **Documentation for Verification of 2016 Income Information for Individuals with Unusual Circumstances**

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

An individual who is required to file a 2016 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2016, must provide:

- A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2016;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2016;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2017;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2016 and,
- If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2016.

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

An individual who filed an amended IRS income tax return for tax year 2016 must provide:

- A **2016 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed);  
**and**
- A signed copy of the 2016 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

### **Individuals Who Were Victims of IRS Tax-Related Identity Theft**

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified;  
**and**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

### **Individuals Who Filed Non-IRS Income Tax Returns**

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.