Financial Services
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Rochester, Michigan 48309
medfinservices@oakland.edu
(248) 370-3611 phone
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2015-2016 Student Tax Filing Form

It is recommended that this form be completed and submitted to Financial Services within 14 days.

A. Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Grizzly# (G#)
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Phone Number (include area code)

B. Student and Spouse (if married) Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If the student and spouse (if married) filed, or will file, an amended 2014 IRS tax return, the student must contact the Financial Aid Office at Oakland University before completing this section.

   Instructions: Complete this section if the student and spouse (if married), filed or will file a 2014 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool (DRT) that is part of FAFSA on the Web. The student can use the IRS DRT by going to www.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 2014 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 contact the Federal Student Aid Information Center at (800) 433-3234.*

   Check the box that applies:

   ☐ The student and spouse (if married) used the IRS Data Retrieval Tool at www.fafsa.gov on this date _____ to transfer 2014 IRS income information into the student's FAFSA without making changes to income transferred from the IRS. *The student's school will use the IRS information that was transferred in the verification process.*

   ☐ The student and spouse (if married) is unable or chooses not to use the IRS Data Retrieval Tool, or made changes to income transferred from the IRS Data Retrieval Tool. Attached is a copy of the student and spouse's (if married) **2014 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 "Order a Return or Account 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 student and spouse (if married) 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 2014 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.*

2. TAX RETURN NONFILERS—Complete this section if the student, and/or spouse (if married) will not file and is not required to file a 2014 income tax return with the IRS. *An IRS letter of non-filing for 2014 will be required. To obtain an IRS letter of non-filing for 2014 by calling the IRS at 1-800-829-1040 or by completing and mailing to the IRS a 4506T available online at www.irs.gov.*

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2014. Attached is a copy of an IRS letter of non-filing for 2014.

☐ The spouse (if married) was not employed and had no income earned from work in 2014. Attached is a copy of an IRS letter of non-filing for 2014.

☐ The student was employed in 2014 and has attached copies of all 2014 IRS W-2 forms issued to the student by employers and an IRS letter of non-filing for 2014. *If a 2014 IRS W-2's was not issued, provide a signed statement listing the student's name, employer's name, address, phone number and the amount earned from work in 2014.*

☐ The spouse (if married) was employed in 2014 and has attached copies of all 2014 IRS W-2 forms issued to the spouse by employers and an IRS letter of non-filing. *If a 2014 IRS W-2's was not issued, provide a signed statement listing the spouse's name, employer's name, address, phone number and the amount earned from work in 2014.*

C. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and spouse (if married) 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