

2016-2017 STUDENT TAX FILING WORKSHEET

(F17TXS)

LAST NAME:	FIRST:	MI:	STUDENT ID #:
LOCAL ADDRESS:			
PHONE:		E-MAIL:	
<input type="checkbox"/> ARIZONA ASSURANCE <input type="checkbox"/> GATES <input type="checkbox"/> NATIVE AMERICAN <input type="checkbox"/> NURSING <input type="checkbox"/> GRAD ELLER <input type="checkbox"/> UA Online Campus			

Clarification regarding your tax filing status is required. Completion of ALL sections is required. The information reported on this form should be for you and your spouse (if applicable).

Section 1 - Required	Student's 2015 Marital and Tax Filing Status
-----------------------------	---

Select the option that is correct for **your marital status** as of the date you filled out your FAFSA.

- | | |
|---|--|
| <input type="checkbox"/> Married/Remarried | <input type="checkbox"/> Single |
| <input type="checkbox"/> Separated | <input type="checkbox"/> Divorced or widowed |
| <input type="checkbox"/> Unmarried and both parents living together | |

Select the option that is correct for **your 2015 tax filing status***.

- | | |
|---|--|
| <input type="checkbox"/> Single | <input type="checkbox"/> Head of Household |
| <input type="checkbox"/> Married - filed joint return | <input type="checkbox"/> Married - filed separate return |
| <input type="checkbox"/> Qualifying widow(er) | |

Section 2 - Required	Students' 2015 Additional Financial Information
-----------------------------	--

Enter the amounts for you and your spouse on the right column. Enter "0" when necessary.

Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33.	\$
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 95.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
Taxable college grant and scholarship aid reported to the IRS in your adjusted gross income . Includes 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. Don't include untaxed combat pay.	\$
Earnings from work under a cooperative education program offered by a college.	\$



Administration Building • Room 208
 P.O. Box 210066, Tucson, AZ 85721-0066
 TEL: 520.621.1858 • FAX: 520.621.9473
financialaid.arizona.edu

* The IRS guide to filing status can be found at the following website, page 20: <http://www.irs.gov/pub/irs-pdf/p17.pdf>

Section 3 - Required	Student's 2015 Untaxed Income
-----------------------------	--------------------------------------

Enter the amounts for you and your spouse on the right column. Enter "0" when necessary.

Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).	
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	
Child support received for any of your children. Don't include foster care or adoption payments.	
Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	
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.	
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.	
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.	
Veterans noneducation 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, 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 or a 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.	
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not part of a legal child support agreement.	

Section 4 - Required	Student's 2015 IRS Tax Return Transcript
-----------------------------	---

In addition to this form, you must also use the IRS Data Retrieval Tool (DRT) within your FAFSA application. If you are ineligible to import your tax data using the DRT, a copy of your 2015 IRS Tax Return Transcripts must be attached to this form. Select one of two options below:

- I used the IRS DRT and transferred the IRS unchanged data
 I am attaching the 2015 IRS Tax Return Transcripts

CERTIFICATION: By signing this worksheet, I certify that all the information reported is complete and correct.

Student signature (required)	Date	Spouse signature (if applicable)	Date



Administration Building • Room 208
 P.O. Box 210066, Tucson, AZ 85721-0066
 TEL: 520.621.1858 • FAX: 520.621.9473
financialaid.arizona.edu

* The IRS guide to filing status can be found at the following website, page 20: <http://www.irs.gov/pub/irs-pdf/p17.pdf>