Frequently Asked 2021-2022 Verification Questions

The U.S. Department of Education selects approximately 30% of students who complete the Free Application for Federal Student Aid (FAFSA) for verification. Verification does not mean that you did something wrong – it is a process in which we must collect documentation from you to verify that the data reported on the FAFSA was entered accurately. This document will answer frequently asked questions regarding verification.

1. How do I know what documents I must submit to complete verification?
   a. Students selected for verification will receive notification from the Department of Education on their Student Aid Report that they have been selected for verification, and then the UW-W Financial Aid Office will send the student a letter or an email listing the documents we need to collect. In addition, the required documents will appear on the To Do List in WINS.

2. How do I submit the verification documents to the UW-Whitewater Financial Aid Office?
   a. Documents can be faxed to us at (262) 472-5655, be dropped off in person in Room 130 of Hyer Hall, or mailed to us at the following address:
      UW-Whitewater
      Financial Aid Office, Hyer Hall 130
      800 West Main Street
      Whitewater, WI 53190
   b. We do not recommend submitting documents via email if those documents contain personal information (social security number, date of birth).

3. Why am I being asked for 2019 tax information?
   a. The 2021-2022 uses 2019 tax information according to federal regulations.

4. How do I obtain a tax transcript?
   a. Get Transcript by Mail – Go to https://www.irs.gov/, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the “Return Transcript” and NOT the “Account Transcript.” The transcript is generally received within 10 business days from the IRS’s receipt of the online request. Once you receive it from the IRS, you will need to send a copy to the UW-W Financial Aid Office.
   b. Get Transcript Online – Go to https://www.irs.gov/, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the “Return Transcript” and NOT the “Account Transcript.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS’s two-step authentication. Once you receive it from the IRS, you will need to send a copy to the UW-W Financial Aid Office.
   c. Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request. Once you receive it from the IRS, you will need to send a copy to the UW-W Financial Aid Office.
   d. Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. You can obtain these forms from the IRS website, and mail or fax them to the IRS after completing them. The transcript is generally received within 10 business days from the IRS’s receipt of the paper request form. Once you receive it from the IRS, you will need to send a copy to the UW-W Financial Aid Office.
5. Is there an alternative to sending in the tax transcript?
   a. There are two alternatives. You can (1) log back into your FAFSA and use the IRS Data Retrieval to import your tax information directly from the IRS or you can (2) submit a signed copy of your federal tax return. As most tax filers do not sign the copy to keep, be sure to sign the second page of the federal 1040 prior to submitting it, however.

6. How do I obtain a verification of non-filing letter from the IRS?
   a. **Get Non-Filing Letter by Mail** – Go to [https://www.irs.gov/](https://www.irs.gov/), click "Get Your Tax Record." Click “Get Transcript by Mail.” Make sure to request the “Verification of Non-filing Letter.” The letter is generally received within 10 business days from the IRS’s receipt of the online request. Once you receive it from the IRS, you will need to send a copy to the UW-W Financial Aid Office.
   
   b. **Get Non-Filing Letter Online** – Go to [https://www.irs.gov/](https://www.irs.gov/), click "Get Your Tax Record." Click “Get Transcript Online.” Make sure to request the “Verification of Non-filing Letter.” To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user’s name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The letter displays online upon successful completion of the IRS’s two-step authentication. Once you receive it from the IRS, you will need to send a copy to the UW-W Financial Aid Office.

   c. **Paper Request Form** – To order this by mail, complete Form 4506-T, which can be found at [https://www.irs.gov/forms-pubs/about-form-4506-t](https://www.irs.gov/forms-pubs/about-form-4506-t). Complete steps 1-4, check the box in #7, Verification of Non-filing and in #9, use 12/31/2019 as the date for 2021-2022 verification materials. Mail or fax to the location identified on page 2 of the form based on your state of residence. Once you receive the Non-filing letter from the IRS, please submit it to us. (see next page)
7. I can’t find my W-2s, what can I do?
   a. If you cannot find your W-2s, first contact your employer to obtain a copy. If the employer cannot provide a copy, obtain a copy from the IRS using Form 4506-T and complete it as seen below. Mail the form to the IRS using the address on page 2 of the form and when you receive the wage and income transcript back, please send us a copy. If you cannot obtain a copy from the IRS, please contact our office for a “missing W-2 form.”
8. If I am submitting a document via email, how can I sign it without printing it off first?
   a. Download (save) the form to your computer.
   b. Go to the location you saved the form and open it using Adobe Acrobat.
   c. On the right hand side of the page you should see “Comment” menu – select that.
   d. A new menu will open on the top of the page and you will see an icon that looks like a pencil (when you hover over it, it will be say “use drawing tool.”
   e. Go to the signature line and use the drawing tool to insert your signature.
   f. Save the PDF and then email it to us.

9. Are there deadlines for submitting verification documents?
   a. Yes. It is recommended that you submit all verification documents by the priority date of January 1 - for the 2021-2022 academic year, the priority date is January 1, 2021. If you are unable to submit documents by January 1, please submit as soon as possible. For most financial aid programs, including Federal Direct Loans, verification documents must be submitted no later than two weeks prior to the last day of the term or your last day of attendance for that term, whichever is earlier, in order to receive aid. For a Federal Pell Grant, verification documents must be submitted no later than 120 days after the last day of attendance or the final deadline for the academic year, whichever is earlier: for 2021-2022, the final deadline is September 10, 2022.

10. Why do I have to include my spouse’s information if we were not married in 2019?
    a. Per Federal Regulations, the FAFSA requires you to list your marital status as of the date you sign and submit your FAFSA. In addition, the federal regulations require you to include spousal income information if you are married as of the date you sign and submit the FAFSA, regardless of whether or not you were married in 2019.

11. Why is my step-parent’s information required?
    a. As a dependent student, the FAFSA requires you list the parental information of the parent with whom you lived with more during the 12 months preceding the date you filed the FAFSA*. If that parent is remarried as of the date you filed the FAFSA, you must include your step-parent’s information, even if they were not married to your parent in 2019. (*if you lived with both parents equally, you include the parent’s (and step-parent’s) information from you received more financial support in the past 12 months.

12. How do I obtain a 1040-X?
    a. A 1040-X is filed when you or the IRS makes a correction to your originally filed federal tax return. If you do not have a copy of your 1040-X contact your tax preparer for a copy. If you are unable to obtain a copy of the 1040-X from your tax preparer, you will need to request a “Record of Account” from the IRS.
    b. To order this by mail, complete Form 4506-T, which can be found at [https://www.irs.gov/forms-pubs/about-form-4506-t](https://www.irs.gov/forms-pubs/about-form-4506-t). Complete steps 1-4, check the box in #6c, Record of Account and in #9, use 12/31/2019 as the date for 2021-2022 verification materials. Mail or fax to the location identified on page 2 of the form based on your state of residence. Once you receive the Record of Account from the IRS, please submit it to us. (see next page)
Request for Transcript of Tax Return

Do not sign this form unless all applicable forms have been completed.

Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1099, Form 1099-NE, Form 1099-IC, Form 1099-P, Form 1099-R, Form 1099-A, Form 1099-B, Form 1099-C, Form 1099-D, Form 1099-E, Form 1099-F, Form 1099-G, Form 1099-MISC. If you need a copy of your return, you may request a copy of the tax return. There is a fee for a copy of the tax return.

Record of Account, which provides the most detailed information as to a combination of the Return Transcript and the Account Statement for the current year and prior years. Requests must be submitted 10 business days in advance.

Current name, address (including apt. numb., city, state, and ZIP code) (see instructions)

Previous address shown on the last return (see instructions)

Signature of the person requesting the transcript (see instructions)

Date