Frequently Asked 2023-2024 Verification Questions

The U.S. Department of Education randomly selects 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 2021 tax information?
   a. The 2023-2024 FAFSA uses 2021 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, along with Schedules 1, 2, & 3. 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 12/31/2021 as the date for 2023-2024 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 2023-2024 academic year, the priority date is January 1, 2023. 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 2023-2024, the final deadline is September 10, 2024.

10. Why do I have to include my spouse’s information if we were not married in 2021?
    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 2021.

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 2021. (*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. Complete steps 1-4, check the box in #6c, Record of Account and in #9, use 12/31/2021 as the date for 2023-2024 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

Form 4506-T

Record of Account, which provides the most detailed information as to what is covered in the Return Transcript and the dates covered by it. Available for current year and prior years. Most requests will be processed within 10 business days.

1. 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 1040X, Form 1041, Form 1042, Form 1042-S, and Form 1099-B. Return transcripts are available for the current year and returns processed during the prior 3-year processing years. Most requests will be processed within 10 business days.

2. Account Transcript, which contains information on the financial status of the account, such as amounts made on the account, penalty assessments, and adjustments made to the IRS after the return was filed. Account information is limited to items such as tax liability and payments.

Signature statements that he/she has read the following and understand that he/she is not authorized to sign the Form 4506-T. See instructions.