University of Wisconsin Whitewater | Financial Aid Office

800 West Main Street
Whitewater, WI 53190
www.uww.edu/financialaid
p 262-472-1130 f 262-472-5655
uwwfao@uww.edu

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.

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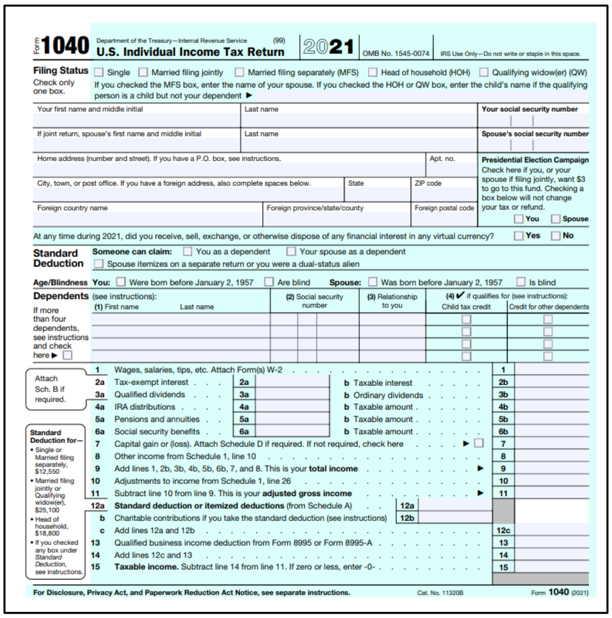
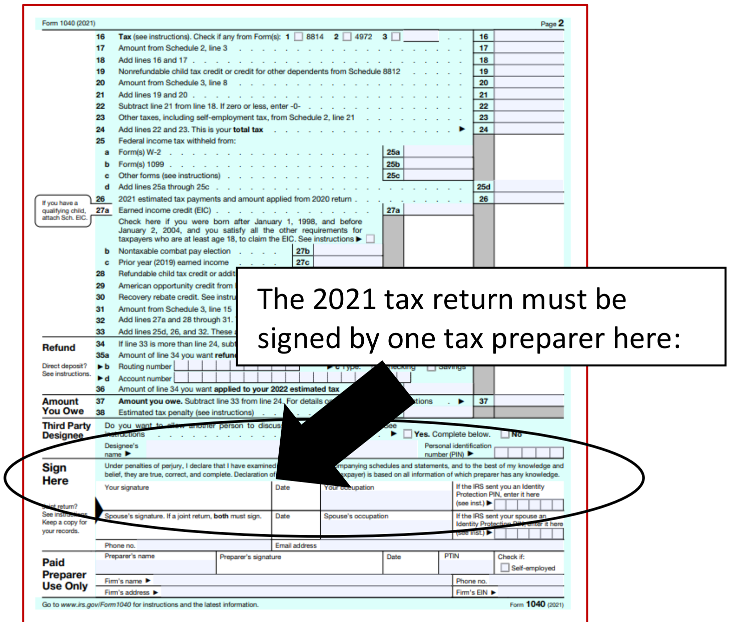
5. Is there an alternative to sending in the tax transcript?
   a. There are two alternatives. You can (1) log back into your FAFSA and use the IRS Data Retrieval to import your tax information directly from the IRS or you can (2) submit a **signed** copy of your **federal** tax return, along with Schedules 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/, 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.
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   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. 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)

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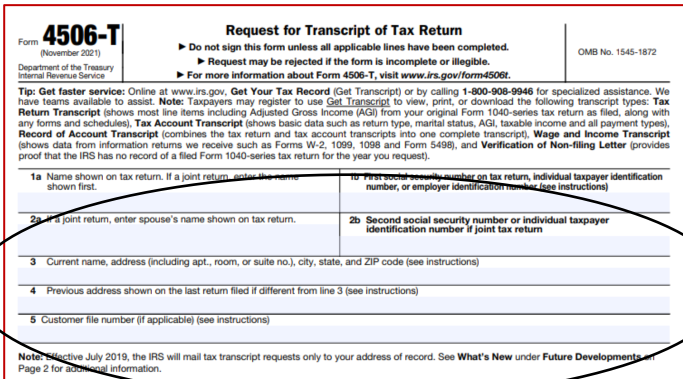


Form **4506-T** (November 2021) Department of the Treasury Internal Revenue Service

Request for Transcript of Tax Return

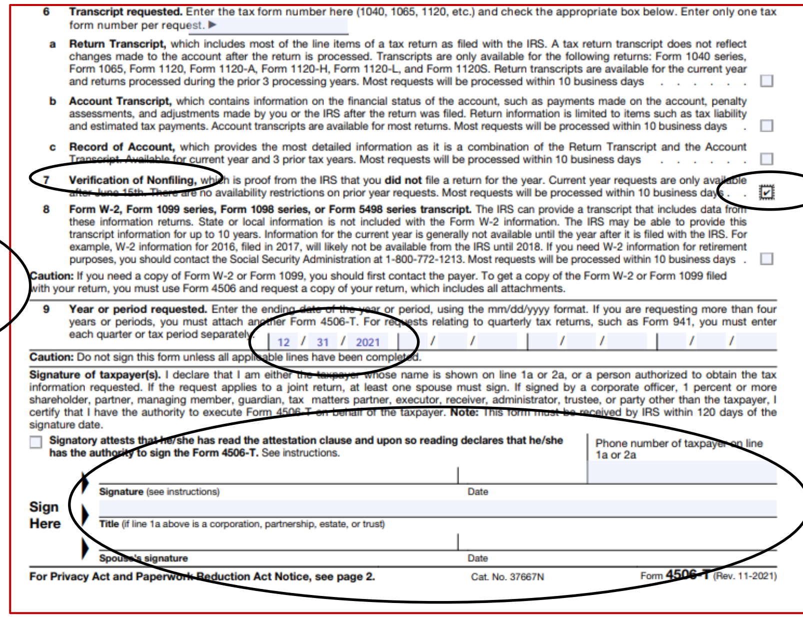
▶ **Do not sign this form unless all applicable lines have been completed.**
▶ **Request may be rejected if the form is incomplete or illegible.**
▶ **For more information about Form 4506-T, visit *www.irs.gov/form4506t*.**

OMB No. 1545-1872

Tip: Get faster service: Online at www.irs.gov, **Get Your Tax Record** (Get Transcript) or by calling **1-800-908-9946** for specialized assistance. We have teams available to assist. **Note:** Taxpayers may register to use Get Transcript to view, print, or download the following transcript types: **Tax Return Transcript** (shows most line items including Adjusted Gross Income (AGI) from your original Form 1040-series tax return as filed, along with any forms and schedules), **Tax Account Transcript** (shows basic data such as return type, marital status, AGI, taxable income and all payment types), **Record of Account Transcript** (combines the tax return and tax account transcripts into one complete transcript), **Wage and Income Transcript** (shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5498), and **Verification of Non-filing Letter** (provides proof that the IRS has no record of a filed Form 1040-series tax return for the year you request).

1a Name shown on tax return. If a joint return, enter the name shown first.
1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.
2b Second social security number or individual taxpayer identification number if joint tax return
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
4 Previous address shown on the last return filed if different from line 3 (see instructions)
5 Customer file number (if applicable) (see instructions)

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.



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b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days ☐

c Record of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days ☐

7 Verification of Nonfiling, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days ☑

8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days ☐

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately. 12 / 31 / 2021 | / / | / / | / /

Caution: Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

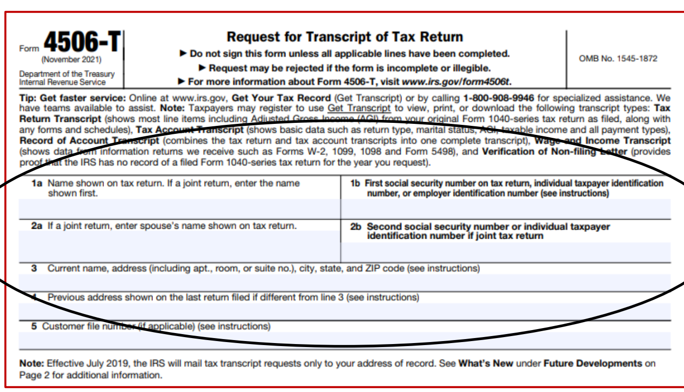
☐ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a

Sign Here
Signature (see instructions) Date
Title (if line 1a above is a corporation, partnership, estate, or trust)
Spouse's signature Date

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form **4506-T** (Rev. 11-2021)

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."



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Request for Transcript of Tax Return

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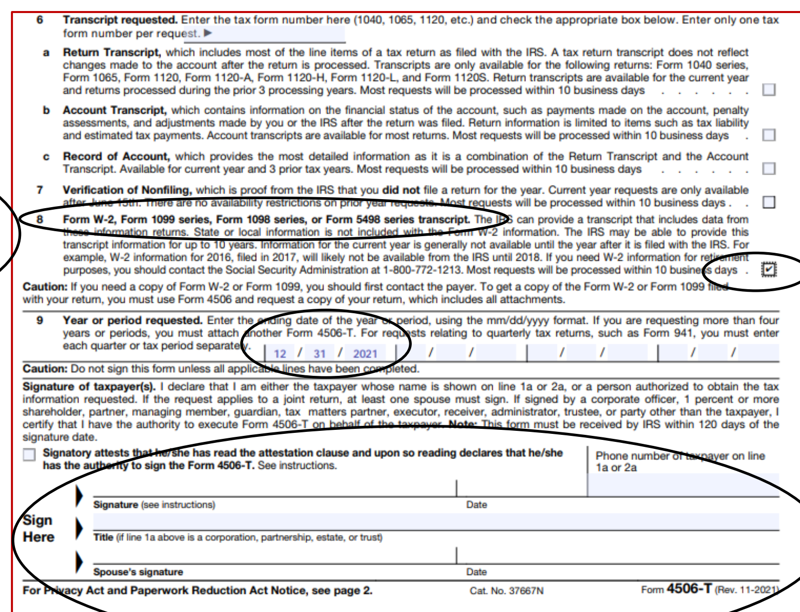

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Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

☐ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a

Sign Here
Signature (see instructions) Date
Title (if line 1a above is a corporation, partnership, estate, or trust)
Spouse's signature Date

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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)

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Sign Here

Signature (see instructions) Date

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature Date

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