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

Frequently Asked 2024-2025 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:

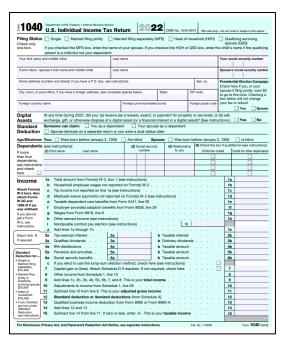
UW-Whitewater Financial Aid Office, Hyer Hall 130 800 West Main Street Whitewater, WI 53190

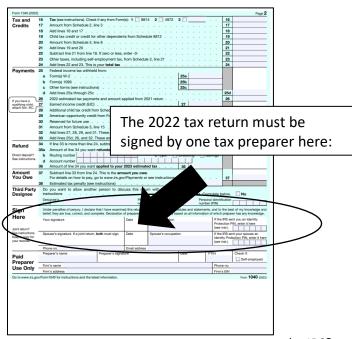
- b. We do not recommend submitting documents via email if those documents contain personal information (social security number, date of birth).
- 3. Why am I being asked for 2022 tax information?
 - a. The 2024-2025 FAFSA uses 2022 tax information according to federal regulations.
- 4. How do I obtain 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

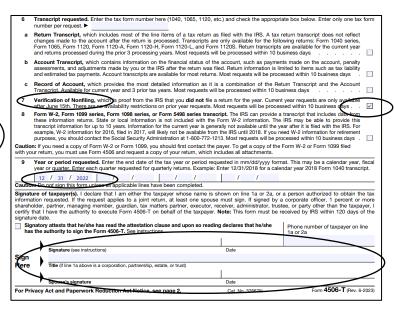
the IRS?

- 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.
- b. **Get Non-Filing Letter Online** Go to 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. Complete steps 1-4, check the box in #7, Verification of Non-filing and in #9, use 12/31/2022 as the date for 2024-2025 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)

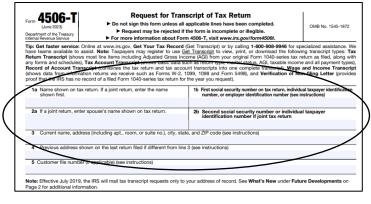


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4 Previous address shown on the last	return filed if different from I	ne 3 (see instructions)	
5 Customer file number (if applicable) (:	see instructions)		_



- 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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Most requests will be processed within 10 business days refrication of Norfilling, which is proof from the IRS that you'd flort file a return for the year. Current year requests are confident on the year. Current year requests are confident of the year.	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 from 1056, Form 1120, Form 1120-A, Form 1120-I, and Form 1120-I, and Form 1120-I settlum transcripts are available for the current yea and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days 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 Account of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account the Account of Account the Account for the Account for the Account for the Account for the Return Transcript and the Account for the Return Transcript and the



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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. 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 2024-2025, the final deadline is September 10, 2025.
- 10. Why do I have to include my spouse's information if we were not married in 2022?
 - 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 2022.
- 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 2022. (*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 12/31/2022 as the date for 2024-2025 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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Form 4506-T (Are 2023) Dipartment of the Tinssury	6 Transcript requested. Enter the tax form number here (1040, 1085, 1120, etc.) and check the appropriate box below. Enter only one ta number per request. ▶ a 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 reform 1040 series Form 1056, Form 1120-F, Form 1120-H, Form 1120-L, and Form 1120-S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business of which 10 the current years.	ct s,
Tip: Get faster service: Online at www.irs.gov, Get Your Tax Record (Get Transcript) or by calling 1-800-980-980 for specialized assistance. Whave teams available to assist. Note: Taxasyers may register to use Get Transcript to view, print, or download the following Armscript types: Taxasyers available to assist. Note: Taxasyers may register to use Get Transcript to view, print, or download the following Adjusted Gross Income (AGI) from your original Form 1040-series to return as field, slong will any form and schedules! Tax Account Transcript thomas basic data such as return two, martial status, AGI, taxable income and all gamment tween.	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	tý
Record of Account Transcript (combines the tax return and tax account transcripts into one complete transcript), Wage and Income Transcri (shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5499), and Verification of Non-filling Letter (provide proof that the IRSh as no record of a field form 1400-series tax return for the year you request).	Record of Account, which provides the most detailed information as it is a combination of time neturn Transcript and the account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 besiness days	<u>"</u> 🖸
,	7 Verification of Nonlining, 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.	
1a Name shown on tax palarer if 8 joint return, enter the name shown first. 1b First social security number on IX resembly individual taxpayer identification number, or employer identification number (see Industrian).	8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data fron these information extens. State or local information is not included with the Form W-2 information. The IRS may be able to provide the transcript information for up to 10 years, Information for the current year is generally not available until the year after 4 is field with the IRS. For the current year is generally not available until the year after 4 is field with the IRS. For the current year is generally not available until the year field.	is or
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	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	
Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)	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.	
Outretin name, address (including apt., rount, or sale incl., city, state, and zir code gee instructions) 4 Previous address shown on the last return filed if different from line 3 (see instructions)	Yest period requested. Enter the end date of the tax year or period requested in mm/dd/yyyy format. This may be a calendar year rear or quarter. Enter each gate requested for quarterly returns. Example: Enter 1221/2018 for a calendar year 2018 Form 1040 transit. 12 / 31 / 2022	
5 Customer file number (if applicable) (see instructions)	Cautien: Do not sign this form unless all oplicable lines have been completed.	
Note: Effective July 2015, the IRS will mail tax transcript requests only to your address of record. See What's New under Patture Developments on Page 2 for additional information.	Signature N-tangwer(s). I declar that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent of shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxp certify that I have the authority to member form 4506-T on behalf of the taxpayer. Note: This form most be received by IRS within 120 days signature date.	or more payer, I
	Signetory 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 taxpays on 1a or 2a	line
,	Signature (see instructions) Date	
(Here Title (if line 1a above is a corporation, partnership, estate, or trust)	