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:

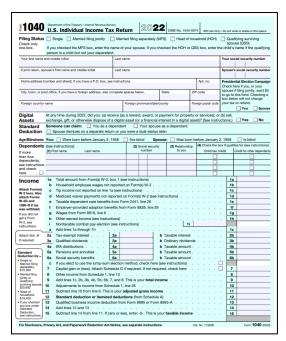
UW-Whitewater Financial Aid Office, Hyer Hall 130 800 West Main Street Whitewater, WI 53190

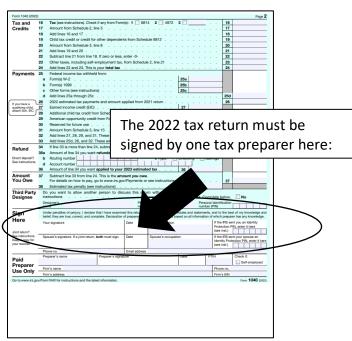
- b. We do not recommend submitting documents via email if those documents contain personal information (social security number, date of birth).
- 3. Why am I being asked for 2022 tax information?
 - a. The 2024-2025 FAFSA uses 2022 tax information according to federal regulations.
- 4. How do I obtain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





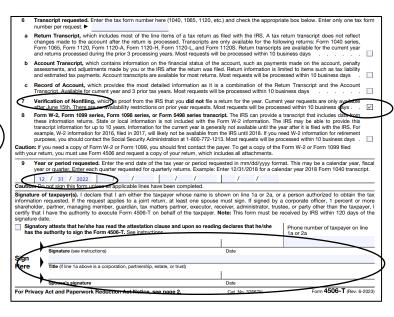
6. How do I obtain a verification of non-filing letter from

- 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)

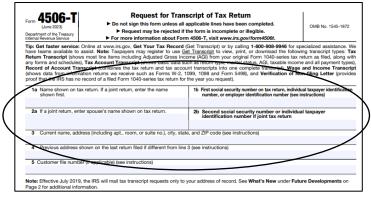


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Form 4506-T (June 2023) Department of the Treasury Internal Revenue Service	➤ Do not sign this form unless all a ➤ Request may be rejected if t	script of Tax Return applicable lines have been completed. the form is incomplete or illegible. n 4506-T, visit www.irs.gov/form4506t.	OMB No. 1545-1872
have teams available to Return Transcript (sho any forms and schedule Record of Account Tra (shows data from inferr	o assist. Note: Taxpayers may register to use Gives most line items including Adjusted Gross Inc. sis, Tax Account Transcript (shows hasic data or anscript (combines the tax return and tax accounts).	Get Transcript) or by calling 1-800-908-9945 for spit It Transcript to view, print, or download the following or the following the following the following or the following the following the following or the following the following the following following the following the following following the following following the following fo	ng transcript types: eturn as filed, along v e and all payment typ and Income Transc
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2a If a joint return, er	nter spouse's name shown on tax return. dress (including apt., room, or suite no.), city, stati	2b Second social security number or individual identification number if joint tax return	,
2a if a joint return, er 3 Current name, ad		2b Second social security number or individual identification number if joint tax return e, and ZIP code (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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Here		Title (if line 1a above is a corporation, partnership, estate, or trust)					
Sign		Signature (see instructions)	Date				
	-	Signature (see instructions)	D-1-		_		
		authority to sign the Form 4506-T. See instructions.	l acoustic distriction	1a or 2a	10		
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with y	Year	urn, you must use Form 4506 and request a copy of your return, where period requested. Enter the end date of the tax year or period	hich includes all attachments. ad requested in mm/dd/yyyy form	nat. This may be a calendar year,			
Cautio	on: If y	ou need a copy of Form W-2 or Form 1099, you should first contact	t the payer. To get a copy of the		_		
		uple, W-2 information for 2016, filed in 2017, will likely not be available oses, you should contact the Social Security Administration at 1-800-7			V		
	trans	cript information for up to 10 years. Information for the current year is	generally not available until the ye	ear after it is filed with the IRS. For			
8		n W-2, Form 1099 series, Form 1098 series, or Form 5498 series					
7		ication of Nonfiling, which is proof from the IRS that you did not tune 15th. There are no availability restrictions on prior year reque					
	Trans	script. Available for current year and 3 prior tax years. Most reques	its will be processed within 10 bu	siness days			
c		estimated tax payments. Account transcripts are available for most re ord of Account, which provides the most detailed information a					
b	asse	ount Transcript, which contains information on the financial status ssments, and adjustments made by you or the IRS after the return	was filed. Return information is lin	nited to items such as tax liability			
	changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1054. Form 1704. Form 1704. In 45 form 1705. Form 1704 is a evaluable for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days.						
	number per request. 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						



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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 (June 2023) Department of the Treasury Internal Revenue Service	➤ Do not sign this form unless all : ➤ Request may be rejected if : ► For more information about For	script of Tax Return applicable lines have been completed. the form is incomplete or illegible. n 4506-T, visit www.irs.gov/form4506t.	OMB No. 1545-1872		6 a	Transcript requested. Enter the tax form number here (1040, 1085, 1120, etc.), and che number per request. Return Transcript, which includes most of the line items of a tax return as filed with changes made to the account after the return is processed. Transcripts are only available from 1065, Forn 1120, Forn 1120-A, Forn 1120-I, Forn 1120-I, and Forn 1120S. Be and returns processed during the prior 3 processing years. Most requests will be process	the IRS. A tax re able for the follow turn transcripts a sed within 10 bus	eturn transcript de ving returns: Forr ire available for th iness days .
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1	2a If a joint return, ea	nter spouse's name shown on tax return.	number, or employer identification number (see h 2b Second social security number or individual identification number if joint tax return	structions)			Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IR these information returns. State or local information is not included with the Form W-2 transcript information for up to 10 years. Information for the current year is generally not averample, W-2 information for 2016, filed in 2017, will likely not be available form the IRS unipurposes, you should contact the Social Security Administration at 1-800-772-1213. Most record in you need a copy of Form W-2 or Form 1099, you should first contact the payer. To go ur return, you must use Form 4506 and request a copy of Your return, which includes all a	nformation. The II ilable until the yea til 2018. If you nee quests will be proce at a copy of the Fe	RS may be able ar after it is filed w ad W-2 information essed within 10 b
1	Previous address Customer file num	shown on the last return filed if different from line ber (if applicable) (see instructions)	3 (see instructions)			Signa	Year—period requests. Enter the end date of the tax year or period requested in me fear or quarter. Enter each quarter requested for quarterly returns. Example: Enter 12/31, 12 / 23 1 / 2022 1 / 20 / 20 1 / 20 / 20 1 / 20 / 20 1 / 20 / 20 1 / 20 / 20 / 20 1 / 20 / 20 / 20 / 20 / 20 / 20 / 20 /	/2018 for a calend / ne 1a or 2a, or a . If signed by a	dar year 2018 For person authorize corporate officer,
L	Note: Effective July 201 Page 2 for additional inf		your address of record. See What's New <u>under Partit</u>	Te Developments on	_	certify signat	that I have the authority to consider rorm 4506-T on behalf of the taxpayer. Note: This use date, use date, and the attestation clause and upon so reading declares is the authority to sign the Form 4506-T. See instructions. Signature (see instructions) Date	Torni must be re-	