

# 2022-2023 Verification Start-to-Finish

[Click Here to Begin!](#)

UNIVERSITY OF  
**LOUISVILLE.**

Student Financial Aid Office  
University of Louisville  
Louisville, KY 40292

# Main Menu

Choose any of the following links for information and instructions on the Verification Process

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# Introduction

## What is Verification?

Verification is the U.S. Department of Education's way of checking that a FAFSA is accurately processed in compliance with federal regulations.

## What does it mean?

- *It does not* mean you are accused of doing anything wrong.
- *It does mean* you need to submit your verification forms and required documentation before your Federal aid can be evaluated and/ or disbursed to your student account with the Bursar's Office..

## How does this affect my financial aid?

- *If you have not been awarded*, you will need to complete verification before your aid can be evaluated.
- *If you have already been awarded*, your Federal aid will not disburse until verification is complete. Some of your awards and/or award amounts may change as a result of the verification process.

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# How do I complete verification?

- This module provides a step-by-step walk through of completing your verification forms.
- As you click on the answers that apply to you, each slide will provide instructions and important information for each section of the form.
- Before you begin, it may be helpful to have the following:
  - Access to your ULink account
  - Access to your 2020 income and tax information
  - Access to your FAFSA in order to use the IRS Data Retrieval Tool

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# When do I need to complete verification?

- It is best to complete verification as soon as the forms are available to you on your ULink account.
- **Remember:** Verification must be completed before your federal aid can be evaluated and/or disbursed to your account with the Bursar's Office.
- Review the due dates below based on your enrollment:

Your Final Term of Enrollment for the Aid Year:	Priority Due Date <sup>(2)</sup> :	Final Deadline <sup>(3)</sup> :
<b>Fall 2022</b>	<b>June 24, 2022</b>	<b>November 28, 2022</b>
<b>Spring 2023</b>	<b>November 28, 2022</b>	<b>April 17, 2023</b>
<b>Summer 2023</b>	<b>April 17, 2023</b>	<b>July 24, 2023</b>

- **Note:** Certain types of aid may not be available if verification is completed after the priority due date.

## Accessing Your Verification Forms

- **ULINK → Tasks → Print FinAid Verification Form**
  - If this is your first time logging in to ULink, click on '*For First Time Users*' under the Log-In Assistance Tab.
  - If you have issues accessing your ULink account, click [here](#).
- You can also contact the Student Financial Aid Office for a copy of your forms.
- **Note:** There may be other items\* on your Tasks list that need to be completed before your Federal aid can be awarded and/or disbursed.
  - Documentation of Citizenship
  - Selective Service Acknowledgement
  - Direct Loan Entrance Counseling

*\*The above list is not exhaustive. Please contact us if you need assistance with other forms that have been assigned to you.*

# 2022-2023 Verification Instructions

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Select the Image  
that Matches Your  
Verification Form

2022-2023 Dependent Verification Form

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Student Financial Aid Office  
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2022-2023 Independent  
Verification Form

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## 2022-2023 Dependent Verification Menu

- If a student is *dependent* as determined by the FAFSA, the student and their parent's income and tax information is required to complete the verification process.
- Use the navigation arrows at the bottom to move forward or backward through the entire module.
- Use the navigation menu to go to a specific set of instructions.

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# Parent Household Information

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- List the parent you included on the FAFSA.
- If that parent was married as of the date you filed the FAFSA, include their spouse in the household section.
- Include your parent's other children if they meet the criteria on the form.

**Who to include in the table below:**

- **Yourself** (the student) even if you do not live with your parent(s).
- **Your parent(s)** you included on your FAFSA (including stepparent).
- **Your parent's other children** (even if they do not live with your parents) **ONLY IF:**
  - A. Your parent(s) will provide more than half of their support from July 1, 2022 through June 30, 2023, **OR**
  - B. The children would be required to provide parental information if they were completing a 2022-2023 FAFSA.
- **Other people\*** **ONLY IF:**
  - A. They live with your parent(s) as of today (the date you sign this form), your parent(s) provides more than half of their support as of today (the date you signed this form), and your parent(s) will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.

- Include everyone's name, age, and relationship to you (the student).
  - This information is required to complete verification.

Age	Relationship to student
	Self
	Parent

# Including Other People in the Household

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There may be other individuals who live in your parent's household. Only include their information if they meet all of the following criteria:

- The person currently lives in your parent's household.
- Your parent(s) currently provide more than 50% of the person's financial support.
- Your parent(s) will continue to provide more than 50% of the person's financial support between July 1, 2022 and June 30, 2023.

**\*If you (the parent) included "other people" in the household size section above, please note:**

Other people could include, but are not limited to, your extended family, fiancé, etc. You may be asked to provide additional information by our office. By signing this form, you (the parent) are verifying this person currently lives with you, you currently provide more than 50% support for this person, and you will continue to provide more than 50% support through June 30, 2023.

In order to claim more than 50% percent support of another individual, you must have adequate income to cover all related expenses. Support includes items such as money, food, clothing, shelter, public utilities, telephone, education, medical and dental care, gifts, payment of college costs, recreation and transportation, etc. You must compare the dollar value of the support provided by yourself to the total support the dependent received from all sources.

# Reviewing Special Circumstances

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- Review the Student and Parent circumstances listed on this page.
  - If none of the circumstances apply, leave the boxes blank.

Special Income and Tax Circumstances	VERF23 Page   4 Student ID:
<b>Section/Page Instructions</b>	
1. Student Name: _____	
2. Please review the following circumstances.	
3. Only check the 'Yes' box in the sections below for any that apply to you and/or your parent(s).	
4. You will be contacted by our office if additional documentation is needed.	
Student: <i>Only check a box if it applies to you</i>	
Parent(s): <i>Only check a box if applicable to the parent(s)</i>	

- If a circumstance applies, check the box and include the requested documentation. Instructions for some common circumstances are linked here.
  - [Amending Taxes](#)
  - [Marital Status Change](#)
  - [Victim of IRS-Related Identity Theft](#)
- If a box is checked and no additional documentation is provided, the SFAO will follow up for additional information.
- **Note:** All statements must include dates and have handwritten signatures.

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## Amended Taxes Instructions

- If a student or parent amended their taxes, they must submit copies of the following documents with the verification forms:
  - Copies of all 2020 income documents: 2020 W2s, or a 2020 Wage and Income Transcript from the IRS
  - Signed copy of the 2020 Tax Return (IRS Form 1040) showing the original information, or a copy of the 2020 Tax Return Transcript from the IRS.
  - Signed copy of a 2020 1040X with amounts on Line 1 and Line 8
    - [More on submitting a 1040X for Verification](#)

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# Amended Taxes Instructions, Continued:

- An IRS Form 1040X is generally submitted to correct the original information provided on an individual's tax return.

Form **1040-X** Department of the Treasury—Internal Revenue Service  
**Amended U.S. Individual Income Tax Return**  
 (Rev. July 2021) Use this revision to amend 2019 or later tax returns. OMB No. 1545-0074  
 ▶ Go to [www.irs.gov/Form1040X](http://www.irs.gov/Form1040X) for instructions and the latest information.

This return is for calendar year (enter year) or fiscal year (enter month and year ended)

Your first name and middle initial Last name Your social security number

- For verification purposes, there need to be amounts on Line 1 and Line 8 of the 1040X. The copy submitted to the office must be signed.

	A. Original amount reported or as previously adjusted (see instructions)	B. Net change—amount of increase or (decrease)—explain in Part III	C. Correct amount
<b>1</b> Adjusted gross income.			
<b>8</b> Subtract line 7 from line 6.			

**Sign Here**

▶ Your signature \_\_\_\_\_ Date \_\_\_\_\_

▶ Spouse's signature. If a joint return, **both** must sign. \_\_\_\_\_ Date \_\_\_\_\_

- If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.

**7** Credits. **7** \_\_\_\_\_



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# Marital Status Change Instructions

- If a student or parent's marital status has changed since **January 1, 2021**, check the appropriate box and complete the statement on the form:

Did your marital status change after January 1, 2021? .....  Yes  
If you checked "Yes" and if you are separated, divorced, or widowed and filed a joint 2020 IRS Income Tax Return, or you are married to someone other than the individual included on your joint 2020 IRS Income Tax Return **you must indicate the change below:**  
**Changed** from: \_\_\_\_\_ to: \_\_\_\_\_ as of: \_\_\_\_\_ / \_\_\_\_\_  
(month) (year)

- Submit a copy of supporting documentation of the marital status change (i.e. divorce decree, marriage or death certificate, separation agreement, etc.).
- **Note:** The SFAO may follow up for additional information to ensure verification is processed correctly.



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## Victim of IRS- Related Tax Identity Theft Instructions

If a student or parent was a victim of IRS-related tax identity theft, please [contact our office](#) regarding the information you will need to submit along with the verification forms.

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# Student Income and Tax Options

Choose a link to view the instructions for each option.

[Option A\\*](#):

Use the IRS Data Retrieval Tool to update your FAFSA and skip the next page of this form:

- [IRS Data Retrieval Tool \(Recommended Option\)](#)

[Option B](#):

Complete the next page of this form and include the required documents with this form:

- [Required Income Information](#)
- [Required Tax Information](#)

I Already Used the IRS Data  
Retrieval Tool

I Don't Know if I used the IRS  
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I Have a Student Amended  
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# IRS Data Retrieval Tool

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- Using the IRS Data Retrieval Tool is strongly encouraged!
  - [Step-by-Step Instructions](#)
  - The FAFSA will show “Transferred from the IRS” when the Data Retrieval Tool is successfully used.
  - You may not be able to see or change the information after it is transferred.

**2022-2023 FAFSA updated using the IRS Data Retrieval Tool**

**Date FAFSA signed and resubmitted: \_\_\_/\_\_\_/\_\_\_\_\_**

- You must sign and resubmit the FAFSA!
  - Include the date you resubmitted your FAFSA on your verification form.

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## Next Steps

Choose the next section of instructions from the options below.

- I used the IRS Data Retrieval Tool. What's next?
  - [Parent Income information](#)
  - [Submitting Forms](#)
- I was unable (or do not want) to use the IRS Data Retrieval Tool. What do I do?
  - You must complete the Student Income Page and submit appropriate documentation.
  - [Student Income Earned from Work](#)
  - [Student Tax Filing Status](#)

# Student Income Earned from Work

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- If you did not work in 2020, check the first box indicating you did not work and made \$0.

**Student 2020 Income Section**

**I did not work in 2020.** My 2020 income earned from working was \$0, and any income from working I may have reported on my FAFSA is incorrect. **OR**

**I did work in 2020.** Complete the following table and attach your 2020 income document(s)\* to this form.

- If you did work in 2020, complete the table on the form.
  - List where you worked.
  - Include how much you earned from each employer.
  - Write the total amount of how much you earned from working in 2020.

Employer Name(s) <small>If more space is needed, provide a separate page with your (the student's) name and ID number at the top.</small>	Copy of 2020 income document* attached?	Student's Amount Earned in <u>2020</u>
1.	<input type="checkbox"/>	\$
2.	<input type="checkbox"/>	\$
3.	<input type="checkbox"/>	\$
How much did you (the student) earn from working in <u>2020</u> ? <small>Add the amounts listed above and any amounts reported on a separate page.</small>		\$ _____



I Don't Have this Page



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- If you worked *but did not file taxes*, submit copies of your 2020 Income documents with your verification form.

**\*Acceptable 2020 Income Documents:**

- IRS W-2 Form(s)
- IRS Wage and Income Statement
- Schedule C(s)
- Schedule K1 IRS Form 1065
- Signed supporting documentation or explanation if an employer did not issue an income document

- 2020 W-2s
- 2020 IRS Wage and Income Transcript
- *If you are unable to provide this documentation, a separate form may be sent for you to explain why your income documents are unavailable.*

Requesting a Wage and Income Transcript

22222		a Employee's social security number 123-45-6789		OMB No. 1545-0008	
b Employer identification number (EIN) 11-2233444		1 Wages, tips, other compensation \$47,000.00		2 Federal income tax withheld \$4,700.00	
c Employer's name, address, and ZIP code  Big Employer 123 Easy Street Washington, DC 12345		3 Social security wages \$50,000.00		4 Social security tax withheld \$3,100.00	
		5 Medicare wages and tips \$50,000.00		6 Medicare tax withheld \$725.00	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial  Ima B. Taxpayer 456 Main Street Philadelphia, PA 12345		Last name  Suff.  11 Nonqualified plans		12a	
f Employee's address and ZIP code		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b	
		14 Other		12c	
15 State Employer's state ID number PA 55-222222222		16 State wages, tips, etc. \$50,000.00		17 State income tax \$1,535.00	
		18 Local wages, tips, etc. \$50,000.00		19 Local income tax \$800.00	
				20 Locality name TGP	

Form **W-2** Wage and Tax Statement **2020** Department of the Treasury—Internal Revenue Service  
For State, City, or Local Tax Department

Internal Revenue Service  
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

### Wage and Income Transcript

Request Date: 07-23-2013  
Response Date: 07-23-2013  
Tracking Number: 00000000000

SSN Provided: 000-00-0000  
Tax Period Requested: December, 2010

#### Form W-2 Wage and Tax Statement

Employer:  
Employer Identification Number (EIN): 000000000  
ANYWHERE MOVING INC  
123 MAIN STREET  
ANYTOWN, ST 00000-0000



# Student Tax Filing Status

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- You must check the correct box to indicate your tax filing status in 2020.

A.  I will not file and am not required to file a 2020 IRS Income Tax Return.

B.  I have filed a 2020 IRS Income Tax Return (choose an option below).

- If you filed taxes, you must submit copies of your 2020 Tax Information. Choose an option below to view instructions.
  - [Option 1: 2020 Tax Return Transcript](#)
  - [Option 2: Signed 2020 Tax Return](#) (IRS Form 1040)

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# Student Taxes Option 1:

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□ **Option 1:** Attach a copy of your 2020 IRS Tax Return Transcript

- Submit a copy of your 2020 Tax Return Transcript.
- A Tax Return Transcript will show information from various schedules, if they were filed.
- [Requesting a Tax Return Transcript](#)
- *Do not submit any of the following:*
  - State Tax Returns.
  - Tax information from a different tax year.



This Product Contains Sensitive Taxpayer Data

Request Date: 05-23-2020  
Response Date: 05-23-2020  
Tracking Number:

Tax Return Transcript

SSN Provided:  
Tax Period Ending:

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

NAME(S) SHOWN ON RETURN:

ADDRESS:

SSN:  
SPOUSE SSN:

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# Student Taxes Option 2:

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**Option 2:** Attach a **signed copy** of your **2020 IRS Form 1040** tax return that was submitted to the IRS (**pages 1 and 2 only**), AND

- Submit a copy of the first two pages of your 2020 Tax Return.

Form **1040** Department of the Treasury—Internal Revenue Service (99) **2020** U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  Qualifying widow(er) (QW)

Your first name and middle initial Last name Your social security number

If joint return, spouse's first name and middle initial Last name Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Presidential Election Campaign

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code

Form 1040 (2020)		Page 2
16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	16
17	Amount from Schedule 2, line 3	17
18	Add lines 16 and 17	18
19	Child tax credit or credit for other dependents	19
20	Amount from Schedule 3, line 7	20
21	Add lines 19 and 20	21
22	Subtract line 21 from line 18. If zero or less, enter -0-	22
23	Other taxes, including self-employment tax, from Schedule 2, line 10	23
24	Add lines 22 and 23. This is your <b>total tax</b>	24

- **Remember:** Your 2020 Tax Return must have your handwritten signature on it.

- **Do not submit any of the following:**
  - State Tax Returns.
  - Tax information from a different tax year.

**Sign Here** Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, this return and accompanying schedules and statements are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.	Your signature	Date	Your occupation
	Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation



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**SCHEDULE 1  
(Form 1040)**

**Additional Income and Adjustments to Income**

OMB No. 1545-0074

**2020**

Attachment

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  Your social security number

**Part I Additional Income**

<b>1</b>	Taxable refunds, credits, or offsets of state and local income taxes . . . . .	<b>1</b>	<input type="text"/>
<b>2a</b>	Alimony received . . . . .	<b>2a</b>	<input type="text"/>
<b>b</b>	Date of original divorce or separation agreement (see instructions) ▶ <input type="text"/>		
<b>3</b>	Business income or (loss). Attach Schedule C . . . . .	<b>3</b>	<input type="text"/>

**SCHEDULE 2  
(Form 1040)**

**Additional Taxes**

OMB No. 1545-0074

**2020**

Attachment

Sequence No. **02**

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  Your social security number

**Part I Tax**

<b>1</b>	Alternative minimum tax. Attach Form 6251 . . . . .	<b>1</b>	<input type="text"/>
<b>2</b>	Excess advance premium tax credit repayment. Attach Form 8962 . . . . .	<b>2</b>	<input type="text"/>

**SCHEDULE 3  
(Form 1040)**

**Additional Credits and Payments**

OMB No. 1545-0074

**2020**

Attachment

Sequence No. **03**

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  Your social security number

**Part I Nonrefundable Credits**

<b>1</b>	Foreign tax credit. Attach Form 1116 if required . . . . .	<b>1</b>	<input type="text"/>
<b>2</b>	Credit for child and dependent care expenses. Attach Form 2441 . . . . .	<b>2</b>	<input type="text"/>
<b>3</b>	Education credits from Form 8863, line 19 . . . . .	<b>3</b>	<input type="text"/>

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**Student Taxes Option 2, Continued:**

If you filed a Schedule 1, 2, or 3 with your IRS Form 1040, you must also submit a copy of those schedules with your verification forms.

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# Student Amended Taxes Instructions

- If the IRS Data Retrieval was used and the FAFSA indicates a student's or parent's taxes were amended, a special page will display on your verification form.
  - Check the correct box to indicate who amended the taxes.
  - Answer questions A, B, and C on the second half of the form.
  - Submit copies of the documents required based on who amended the taxes.

Who amended your 2020 Federal Tax Return?	
<input type="checkbox"/>	<p><b>I did not amend my 2020 taxes, the <u>IRS</u> amended them for me.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Attach a copy of your <b>2020 IRS Tax Account Transcript</b>.<ul style="list-style-type: none"><li>o <i>Instructions for requesting a Tax Account Transcript can be found here: <a href="https://louisville.edu/financialaid/verification/irs-tax-transcript">https://louisville.edu/financialaid/verification/irs-tax-transcript</a>.</i></li><li>o <i>Please note that you will need to select <b>Tax Account Transcript</b> as the document you request.</i></li></ul></li></ul>
<input type="checkbox"/>	<p><b>I amended my 2020 taxes.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Attach <b>copies</b> of all <b>2020</b> income documents* for each source of <u>employment income</u></li><li><input type="checkbox"/> Attach a <b>signed copy</b> of your <b>2020 IRS Form 1040X</b>. Ensure there are amounts on Line 1 and Line 8 of the 1040X. The amount from the original return should be in Column A and the amount after amending should be in Column C.</li></ul>

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# Submitting a 1040-X

- An IRS Form 1040X is generally submitted to correct the original information provided on an individual's tax return.

Form **1040-X** Department of the Treasury—Internal Revenue Service  
**Amended U.S. Individual Income Tax Return**  
 (Rev. July 2021) Use this revision to amend 2019 or later tax returns. OMB No. 1545-0074  
 ▶ Go to [www.irs.gov/Form1040X](http://www.irs.gov/Form1040X) for instructions and the latest information.

This return is for calendar year (enter year) or fiscal year (enter month and year ended)

Your first name and middle initial Last name Your social security number

- For verification purposes, there need to be amounts on Line 1 and Line 8 of the 1040X. The copy submitted to the office must be signed.

	A. Original amount reported or as previously adjusted (see instructions)	B. Net change—amount of increase or (decrease)—explain in Part III	C. Correct amount
<b>1</b> Adjusted gross income.			
<b>8</b> Subtract line 7 from line 6.			

**Sign Here**

▶ \_\_\_\_\_ Date \_\_\_\_\_

Your signature

▶ \_\_\_\_\_ Date \_\_\_\_\_

Spouse's signature. If a joint return, **both** must sign.

- If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.

**7** Credits. **7** \_\_\_\_\_



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Menu

# Parent Income and Tax Options

My parent(s) already used the  
IRS Data Retrieval Tool

I don't know if my parent used  
the IRS Data Retrieval Tool

I Don't Have this Page

I Have a Parent Amended  
Taxes Page

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## *Skip to Section:*

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- [Special Circumstances](#)
- [Student Income Information](#)
- [Parent Income Information](#)
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- Choose a link to view the instructions for each option.

Option A\*:

Use the IRS Data Retrieval Tool to update your FAFSA and skip the next page of this form.

- [IRS Data Retrieval Tool \(Recommended Option\)](#)

Option B:

Complete the next page and include the required documents with this form.

- [Required Income Information](#)
- [Required Tax Information](#)

# IRS Data Retrieval Tool

- [Parent Income Menu](#)
- [IRS Data Retrieval Tool Instructions](#)
- [Required Income Information](#)
- [Required Tax Information](#)
- [Skip to Submitting Forms](#)

- Using the IRS Data Retrieval Tool is strongly encouraged!
  - [Step-by-Step Instructions](#)
  - The FAFSA will show “Transferred from the IRS” when the Data Retrieval Tool is successfully used.
  - You may not be able to see or change the information after it is transferred.

2022-2023 FAFSA updated using the IRS Data Retrieval Tool

Date FAFSA signed and resubmitted: \_\_\_\_/\_\_\_\_/\_\_\_\_

- You must sign and resubmit the FAFSA!
  - Include the date you resubmitted your FAFSA on your verification form.

- [Parent Income Menu](#)
- [IRS Data Retrieval Tool Instructions](#)
- [Required Income Information](#)
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## Next Steps

Choose the next section of instructions from the options below.

- My parent used the IRS Data Retrieval Tool. What's next?
  - [Submitting Forms](#)
- My parent was unable (or does not want) to use the IRS Data Retrieval Tool. What do I do?
  - You must complete the Parent Income Page and submit appropriate documentation.
  - [Parent Income Earned from Work](#)
  - [Parent Tax Filing Status](#)

# Parent Income Earned from Work

- [Parent Income Menu](#)
- [IRS Data Retrieval Tool Instructions](#)
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- [Skip to Submitting Forms](#)

- If your parent did not work in 2020, they must check the box indicating they did not work and made \$0.

**Parent 1 2020 Income Section:** Parent 1 Name (parent/stepparent): \_\_\_\_\_

Parent 1 **did not work** in 2020 and the 2020 income earned from working was \$0. **OR**

Parent 1 **did work** in 2020: Complete the following table and attach 2020 income document(s)\* to this form.

- If your parent did work, complete the table on the form.
  - List where your parent(s) worked.
  - Include how much they earned from each employer.
  - Write the total amount they earned from working in 2020.

Employer Name(s) <small>If more space is needed, provide a separate page with the student's name and ID number at the top.</small>	Copy of 2020 income document* attached?	Parent 1 Amount Earned in <u>2020</u>
1.	<input type="checkbox"/>	\$
2.	<input type="checkbox"/>	\$
3.	<input type="checkbox"/>	\$
How much did Parent 1 earn from working in <u>2020</u> ? <small>Add the amounts listed above and any amounts reported on a separate page.</small>		\$ _____

- **Note:** If your parent is married *as of the date you filed the FAFSA*, they must provide their spouse's information in order to complete verification. This information is required even if your parent was not married in 2020.

I Don't Have this Page





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- [IRS Data Retrieval Tool Instructions](#)
- [Required Income Information](#)
- [Required Tax Information](#)
- [Skip to Submitting Forms](#)

■ If your parent worked but did not file taxes, submit copies of their oncome documents.

**\*Acceptable 2020 Income Documents:**

- IRS W-2 Form(s)
- IRS Wage and Income Statement
- Schedule C(s)
- Schedule K1 IRS Form 1065
- Signed supporting documentation or explanation **if** an employer did not issue an income document

■ 2020 W-2s

■ 2020 IRS Wage and Income Transcript

Requesting a Wage and Income Transcript

■ *If your parent is unable to provide this documentation, a separate form may be sent for them to explain why their income documents are unavailable.*

■ **Remember:** Information must be provided for your parent and their spouse if they are married as of the date you filed the FAFSA.

22222		a Employee's social security number 123-45-6789		OMB No. 1545-0008	
b Employer identification number (EIN) 11-2233444		1 Wages, tips, other compensation \$47,000.00		2 Federal income tax withheld \$4,700.00	
c Employer's name, address, and ZIP code  Big Employer 123 Easy Street Washington, DC 12345		3 Social security wages \$50,000.00		4 Social security tax withheld \$3,100.00	
		5 Medicare wages and tips \$50,000.00		6 Medicare tax withheld \$725.00	
		7 Social security tips		8 Allocated tips	
		9		10 Dependent care benefits	
d Control number		11 Nonqualified plans		12a	
e Employee's first name and initial  Ima B. Taxpayer 456 Main Street Philadelphia, PA 12345		13 Statutory employee Retirement plan Third-party employer		12b	
		14 Other		12c	
				12d	
f Employee's address and ZIP code		15 State Employer's state ID number PA 55-22222222		16 State wages, tips, etc. \$50,000.00	
		17 State income tax \$1,535.00		18 Local wages, tips, etc. \$50,000.00	
				19 Local income tax \$800.00	
				20 Locality name TGP	

Form **W-2** Wage and Tax Statement **2020** Department of the Treasury—Internal Revenue Service  
Copy 1—For State, City, or Local Tax Department

Internal Revenue Service  
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

**Wage and Income Transcript**

Request Date: 07-23-2013  
Response Date: 07-23-2013  
Tracking Number: 000000000000

SSN Provided: 000-00-0000  
Tax Period Requested: December, 2010

**Form W-2 Wage and Tax Statement**

Employer:  
Employer Identification Number (EIN): 000000000  
ANYWHERE MOVING INC  
123 MAIN STREET  
ANYTOWN, ST 00000-0000

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# Parent Tax Filing Status

- [Parent Income Menu](#)
- [IRS Data Retrieval Tool Instructions](#)
- [Required Income Information](#)
- [Required Tax Information](#)
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- Your parent must check the correct box to indicate their tax filing status in 2020.

A.  \_\_\_\_\_ (parent 1 name) will not file and is not required to file a 2020 IRS Income Tax Return.

B.  \_\_\_\_\_ (parent 1 name) has filed a 2020 IRS Income Tax Return.

- [Click here if your parent\(s\) did not file taxes](#)
- If either parent filed taxes, they must submit copies of their 2020 Tax Information. Choose an option below to view instructions.
  - [Option 1: 2020 Tax Return Transcript](#)
  - [Option 2: Signed 2020 Tax Return](#) (IRS Form 1040)
- **Remember:** Information must be provided for your parent and their spouse if they are married as of the date you filed the FAFSA.

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I Have a Parent Amended  
Taxes Page

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## Instructions for Non-Tax Filers:

- If your parent (or their spouse) did not file taxes, they must submit a copy of a Verification of Non-Filing Letter from the IRS. Make sure to request a letter for the 2020 Tax Year.
  - [Step-by-Step Instructions](#)
  - You may receive a letter stating *“As of the date of this letter, we have no record of a processed tax-return for the tax period listed above. You may consider this letter a verification of non-filing.”*
  - You may also receive a document indicating *‘No Record of Account’* was filed.
  - Either of the above documents can be submitted for verification.
- [My parent\(s\) are unable to request a Letter.](#)

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- [Parent Income Menu](#)
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## Verification of Non-Filing by Mail

- If your parent (or their spouse) is unable to request a Verification of Non-Filing online, they may need to request one by mail completing an [IRS Form 4506-T](#).
  - Instructions for [Requesting IRS Documents by Mail](#).
  - Check [Box 7](#) and list [12/31/2020](#) as the Tax Period.
  - Mail a copy of the form to the IRS and keep one for your records.
  - The IRS should mail back a Verification of Non-Filing Letter.
  - Submit a copy of this document to our office.
- If you do not receive a letter within 10 days after mailing your request, [contact our office](#).

# Parent Tax Option 1:

- [Parent Income Menu](#)
- [IRS Data Retrieval Tool Instructions](#)
- [Required Income Information](#)
- [Required Tax Information](#)
- [Skip to Submitting Forms](#)

Option 1: • Attach a copy of your parents\* 2020 IRS Tax Return Transcript(s)

- Submit a copy of your parent's 2020 Tax Return Transcript.
- A Tax Return Transcript will show the information from various schedules, if they were filed.
- [Requesting a Tax Return Transcript](#)
- Do not submit any of the following:
  - State Tax Returns.
  - Tax information from a different tax year.



This Product Contains Sensitive Taxpayer Data

Request Date: 05-23-2020  
Response Date: 05-23-2020  
Tracking Number:

Tax Return Transcript

SSN Provided:  
Tax Period Ending:

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

NAME(S) SHOWN ON RETURN:

ADDRESS:

SSN:  
SPOUSE SSN:

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# Parent Tax Option 2:

- [Parent Income Menu](#)
- [IRS Data Retrieval Tool Instructions](#)
- [Required Income Information](#)
- [Required Tax Information](#)
- [Skip to Submitting Forms](#)

- Option 2:
  - Attach a **signed copy** of your parents'\* **2020 IRS Form 1040** tax return that was submitted to the IRS (**pages 1 and 2 only**), AND
  - Submit a copy of the first two pages of your parent's 2020 Tax Return.

Form 1040 Department of the Treasury—Internal Revenue Service (99) 2020 U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  Qualifying widow(er) (QW)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial	Last name	Your social security number
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions.		Apt. no.
City, town, or post office. If you have a foreign address, also complete spaces below.		State ZIP code

**Presidential Election Campaign**  
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change

m 1040 (2020) Page 2

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	16
17	Amount from Schedule 2, line 3	17
18	Add lines 16 and 17	18
19	Child tax credit or credit for other dependents	19
20	Amount from Schedule 3, line 7	20
21	Add lines 19 and 20	21
22	Subtract line 21 from line 18. If zero or less, enter -0-	22
23	Other taxes, including self-employment tax, from Schedule 2, line 10	23
24	Add lines 22 and 23. This is your <b>total tax</b>	24

- **Remember:** Your parent's 2020 Tax Return must have their handwritten signature on it.

- **Do not submit any of the following:**
  - State Tax Returns.
  - Tax information from a different tax year.

**Sign Here** Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, this return and the information contained hereon are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.	Your signature	Date	Your occupation
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation

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**SCHEDULE 1 (Form 1040)** **Additional Income and Adjustments to Income** OMB No. 1545-0074 **2020** Attachment Sequence No. **01**

Department of the Treasury Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR \_\_\_\_\_ Your social security number \_\_\_\_\_

**Part I Additional Income**

1	Taxable refunds, credits, or offsets of state and local income taxes . . . . .	1	
2a	Alimony received . . . . .	2a	
b	Date of original divorce or separation agreement (see instructions) ▶ _____		
3	Business income or (loss). Attach Schedule C . . . . .	3	

## Parent Tax Option 2, Continued:

If your parent filed a Schedule 1, 2, or 3 with their IRS Form 1040, you must also submit a copy of those schedules with your verification forms.

**SCHEDULE 2 (Form 1040)** **Additional Taxes** OMB No. 1545-0074 **2020** Attachment Sequence No. **02**

Department of the Treasury Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR \_\_\_\_\_ Your social security number \_\_\_\_\_

**Part I Tax**

1	Alternative minimum tax. Attach Form 6251 . . . . .	1	
2	Excess advance premium tax credit repayment. Attach Form 8962 . . . . .	2	

**SCHEDULE 3 (Form 1040)** **Additional Credits and Payments** OMB No. 1545-0074 **2020** Attachment Sequence No. **03**

Department of the Treasury Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR \_\_\_\_\_ Your social security number \_\_\_\_\_

**Part I Nonrefundable Credits**

1	Foreign tax credit. Attach Form 1116 if required . . . . .	1	
2	Credit for child and dependent care expenses. Attach Form 2441 . . . . .	2	
3	Education credits from Form 8863, line 19 . . . . .	3	



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# Parent Amended Taxes Instructions

- If the IRS Data Retrieval was used and the FAFSA indicates a student's or parent's taxes were amended, a special page will display on your verification form.
  - Check the correct box to indicate who amended the taxes.
  - Answer questions A, B, and C on the second half of the form.
  - Submit copies of the documents required based on who amended the taxes.

Who amended your parents' 2020 Federal Tax Return?	
<input type="checkbox"/>	<p><b>The IRS amended them. My parent(s) did not amend.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Attach a copy of your parents' <b>2020 IRS Tax Account Transcript</b>.<ul style="list-style-type: none"><li>○ <i>Instructions for requesting a Tax Account Transcript can be found here: <a href="https://louisville.edu/financialaid/verification/irs-tax-transcript">https://louisville.edu/financialaid/verification/irs-tax-transcript</a>.</i></li><li>○ <i>Please note that you will need to select <b>Tax Account Transcript</b> as the document you request.</i></li></ul></li></ul>
<input type="checkbox"/>	<p><b>My parent(s) amended the tax return.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Attach <b>copies</b> of all of your parent's <b>2020</b> income documents* for each source of <u>employment income</u></li><li><input type="checkbox"/> Attach a <b>signed copy</b> of your parents' <b>2020 IRS Form 1040X</b>. Ensure there are amounts on Line 1 and Line 8 of the 1040X. The amount from the original return should be in Column A and the amount after amending should be in Column C.</li></ul>



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- [Special Circumstances](#)
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Submitting a 1040-X

- An IRS Form 1040X is generally submitted to correct the original information provided on an individual's tax return.

Form **1040-X** Department of the Treasury—Internal Revenue Service  
**Amended U.S. Individual Income Tax Return**  
 (Rev. July 2021) Use this revision to amend 2019 or later tax returns. OMB No. 1545-0074  
 ▶ Go to [www.irs.gov/Form1040X](http://www.irs.gov/Form1040X) for instructions and the latest information.

This return is for calendar year (enter year) or fiscal year (enter month and year ended)

Your first name and middle initial Last name Your social security number

- For verification purposes, there need to be amounts on Line 1 and Line 8 of the 1040X. The copy submitted to the office must be signed.

	A. Original amount reported or as previously adjusted (see instructions)	B. Net change—amount of increase or (decrease)—explain in Part III	C. Correct amount
<b>1</b> Adjusted gross income.			
<b>8</b> Subtract line 7 from line 6.			

**Sign Here**

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Your signature

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Spouse's signature. If a joint return, **both** must sign.

- If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.

**7** Credits. **7** \_\_\_\_\_





# Signing and Submitting Your Forms

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- [Parent Income Information](#)
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- Signatures must be handwritten!

**Signatures: This section must be completed.**

Sign and date this form with a handwritten signature. Electronic/typed signatures are not acceptable.

**Certification and Signature:** I certify that all the information on this form, and any attached documentation, is true and complete to the best of my knowledge. I understand that if I purposely give false or misleading information, I may be fined up to \$20,000, sent to prison, or both.

**Student's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Parent's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

Both the student and one parent must sign.

- You and your parent must sign the form.
- Cursive fonts, typed names, and electronic signatures will not be accepted.



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- **Do not submit any forms, statements, or attached documents by email!**

<b>Please return your <u>signed</u> form and, if applicable, all requested documentation to the UofL Student Financial Aid Office using one of the options below:</b>	
<i>The form must be printed <u>then</u> signed with a handwritten signature(s) before submitting.</i>	
<b>ULink Financial Aid Document Upload Option:</b>	Log into your student <b>ULink</b> account at <a href="http://ulink.louisville.edu/">http://ulink.louisville.edu/</a> , open your 'Financial Aid' Tile and select the 'Financial Aid Document Upload' menu. For additional information, please visit: <a href="https://louisville.edu/financialaid/other-information/financial-document-upload">https://louisville.edu/financialaid/other-information/financial-document-upload</a>
<b>Mail or In Person Options:</b>	Student Financial Aid Office, Houchens Building Room 110 University of Louisville Louisville, KY 40292
<b>Fax Number Option:</b>	502.852.0182

- [Document Upload Instructions](#)
- Do not submit forms to any other office.
- Submit your forms and required documents as soon as possible.
- Incomplete forms will delay the verification and awarding processes:
  - Missing documents (W-2s, Tax Returns, statements, etc.)
  - Incomplete documents (i.e. Tax Returns and statements without handwritten signatures, unanswered questions on the verification form, etc.)

- [Module Menu](#)
- [2022-2023 Menu](#)
- [Verification Tips](#)

## 2022-2023 Independent Verification Menu

- If a student is *independent* as determined by the FAFSA, the student's income and tax information is required to complete the verification process.
- If a student is married as of the date they filed the FAFSA, their spouse's information is also required.
- Use the navigation arrows at the bottom to move to the next slide in the module.
- Use the navigation menu to go to a specific set of instructions.

### *Skip to Section:*

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# Student Household Information

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- List yourself.
- If you were married as of the date you filed the FAFSA, list your spouse.
- Include your children if they meet the criteria on the form.

**Who to include in the table below:**

- List yourself and your spouse (if married)
- List your children **ONLY IF:**
  - A. You will provide more than half of their support from July 1, 2022 through June 30, 2023, even if they do not live with you.
- List **other people\*** **ONLY IF:**
  - A. They live with you as of today (the date you sign this form), you provide more than half of their support as of today (the date you signed this form), and you will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.

- Include everyone's name, age, and relationship to you (the student).
  - This information is required to complete verification.

Age	Relationship to student
	Self

# Including Other People in the Household

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- There may be other people in the household you live in. Only include them if *all* of the following criteria apply:
  - They currently live with you.
  - You are currently providing more than 50% of their financial support.
  - You will continue to provide more than 50% of their financial support through June 30, 2023.

**\*If you included "other people" in the household size section above, please note:**

Other people could include, but are not limited to, your extended family, fiancé, etc. You may be asked to provide additional information by our office. By signing this form, you are verifying this person currently lives with you, you currently provide more than 50% support for this person, and you will continue to provide more than 50% support through June 30, 2023.

In order to claim more than 50% percent support of another individual, you must have adequate income to cover all related expenses. Support includes items such as money, food, clothing, shelter, public utilities, telephone, education, medical and dental care, gifts, payment of college costs, recreation and transportation, etc. You must compare the dollar value of the support provided by yourself to the total support the dependent received from all sources.

# Reviewing Special Circumstances

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- [Student Household Information](#)
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- Review the circumstances listed on this page.
  - If none of the circumstances apply, leave the boxes blank.

Special Income and Tax Circumstances	VERF23 Page   4 Student ID:
<b>Section/Page Instructions</b>	
1. Student Name: _____	
2. Please review the following circumstances.	
3. Only check the 'Yes' box in the sections below for any that apply to you and/or your parent(s).	
4. You will be contacted by our office if additional documentation is needed.	
Student: <i>Only check a box if it applies to you</i>	

- If a circumstance applies, check the box and include the requested documentation. Instructions for some common circumstances are linked here.
  - [Amending Taxes](#)
  - [Marital Status Change](#)
  - [Victim of IRS-Related Identity Theft](#)
- If a box is checked and no additional documentation is provided, the SFAO will follow up for additional information.
  - **Note:** All statements must include dates and have handwritten signatures.

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## Amended Taxes Instructions

- If a student (or their spouse) amended their taxes, submit copies of the following documents with the verification forms:
  - Copies of all 2020 income documents (W-2s, or a 2020 Wage and Income Transcript from the IRS)
  - A signed copy of the 2020 Tax Return (IRS Form 1040) showing the original information, or a copy of the 2018 Tax Return Transcript from the IRS.
  - A signed copy of a 2020 1040X with amounts on Line 1 and Line 8
    - [More on submitting a 1040X for Verification](#)
- **Note:** If the IRS Data Retrieval was used and the FAFSA indicates a student's taxes were amended, the Student Financial Aid Office will follow up for additional information.



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Amended Taxes  
Instructions,  
Continued:

- An IRS Form 1040X is generally submitted to correct the original information provided on an individual's tax return.

Form **1040-X** Department of the Treasury—Internal Revenue Service  
**Amended U.S. Individual Income Tax Return**  
 Use this revision to amend 2019 or later tax returns.  
 (Rev. July 2021) Go to [www.irs.gov/Form1040X](http://www.irs.gov/Form1040X) for instructions and the latest information. OMB No. 1545-0074

This return is for calendar year (enter year) or fiscal year (enter month and year ended)

Your first name and middle initial Last name Your social security number

- For verification purposes, there need to be amounts on Line 1 and Line 8 of the 1040X. The copy submitted to the office must be signed.

	A. Original amount reported or as previously adjusted (see instructions)	B. Net change—amount of increase or (decrease)—explain in Part III	C. Correct amount	Sign Here	
1	Adjusted gross income.			Your signature _____ Date _____	
8	Subtract line 7 from line 6.			Spouse's signature. If a joint return, both must sign. _____ Date _____	

- If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.

7	Credits.	7			
---	----------	---	--	--	--



*Skip to Section:*

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# Marital Status Change Instructions

- If a student's (or their spouse's) marital status has changed since January 1, 2021, complete the statement on the form:

Did your marital status change after January 1, 2021? .....  Yes  
If you checked "Yes" and if you are separated, divorced, or widowed and filed a joint 2020 IRS Income Tax Return, or you are married to someone other than the individual included on your joint 2020 IRS Income Tax Return **you must indicate the change below:**

**Changed** from: \_\_\_\_\_ to: \_\_\_\_\_ as of: \_\_\_\_\_ / \_\_\_\_\_  
(month) (year)

- Submit a copy of supporting documentation of the marital status change (i.e. divorce decree, marriage or death certificate, separation agreement, etc.).
- **Note:** The SFAO may follow up for additional information to ensure verification is processed correctly.

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## Victim of IRS- Related Tax Identity Theft Instructions

If a student or their spouse was a victim of IRS-related tax identity theft, please contact our office regarding the information you will need to submit along with the verification forms.

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# Student Income and Tax Options

Choose a link to view the instructions for each option.

[Option A\\*](#):

Use the IRS Data Retrieval Tool to update your FAFSA and skip the next page of this form.

- [IRS Data Retrieval Tool \(Recommended Option\)](#)

[Option B](#):

Complete the next page and include the required documents with this form.

- [Required Income Information](#)
- [Required Tax Information](#)

I Already Used the IRS Data Retrieval Tool

I Don't Know if I used the IRS Data Retrieval Tool

I Have a Student Amended Taxes Page

I Don't Have this Page

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# IRS Data Retrieval Tool

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- Using the IRS Data Retrieval Tool is strongly encouraged!
  - [Step-by-Step Instructions](#)
  - The FAFSA will show “Transferred from the IRS” when the Data Retrieval Tool is successfully used.
  - You may not be able to see or change the information after it is transferred.
    - [2022-2023 FAFSA updated using the IRS Data Retrieval Tool](#)
    - [Date FAFSA signed and resubmitted: \\_\\_\\_\\_/\\_\\_\\_\\_/\\_\\_\\_\\_](#)
- You must sign and resubmit the FAFSA!
  - Include the date you resubmitted your FAFSA on your verification form
- **Note:** If you successfully used the IRS Data Retrieval Tool prior to accessing your verification forms, this page will not be included.

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## Next Steps

Choose the next section of instructions from the options below.

- I used the IRS Data Retrieval Tool. What's next?
  - [Submitting Forms](#)
- I was unable (or do not want) to use the IRS Data Retrieval Tool. What do I do?
  - You must complete the Student Income Page and submit appropriate documentation.
  - [Income Earned from Work](#)
  - [Tax Filing Status](#)

# Student Income Earned from Work

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- If you did not work in 2020, check the box that indicates you did not work and you earned \$0.

### Student 2020 Income Section

- I did not work in 2020.** My 2020 income earned from working was \$0, and any income from working I may have reported on my FAFSA is incorrect. **OR**
- I did work in 2020.** Complete the following table and attach your 2020 income document(s)\* to this form.

- If you did work in 2020, check the second box and complete the table on the form.

- List where you worked.
- Include how much you earned from each employer.
- Write the total amount you earned from working in 2020.

Employer Name(s) <small>If more space is needed, provide a separate page with your (the student's) name and ID number at the top.</small>	Copy of 2020 income document* attached?	Student's Amount Earned in 2020
1.	<input type="checkbox"/>	\$
2.	<input type="checkbox"/>	\$
3.	<input type="checkbox"/>	\$
How much did you (the student) earn from working in 2020? <small>Add the amounts listed above and any amounts reported on a separate page.</small>		\$ _____

- Note:** If you are married *as of the date you filed the FAFSA*, you must provide your spouse's information in order to complete verification. This information is required even if you were not married in 2020.

- If you or you spouse worked, submit copies of your 2020 Income documents.

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- [Required Income Information](#)
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- 2020 W-2s
- 2020 IRS Wage and Income Transcript

Requesting a Wage and Income Transcript

- *If you are unable to provide this documentation, a separate form may be sent for you to explain why your income documents are unavailable.*

- **Remember:** Information must be provided for you and your spouse if you are married as of the date you filed the FAFSA.

22222		a Employee's social security number 123-45-6789		OMB No. 1545-0008	
b Employer identification number (EIN) 11-2233444		1 Wages, tips, other compensation \$47,000.00		2 Federal income tax withheld \$4,700.00	
c Employer's name, address, and ZIP code  Big Employer 123 Easy Street Washington, DC 12345		3 Social security wages \$50,000.00		4 Social security tax withheld \$3,100.00	
		5 Medicare wages and tips \$50,000.00		6 Medicare tax withheld \$725.00	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial  Ima B. Taxpayer 456 Main Street Philadelphia, PA 12345		Last name  Suff.		11 Nonqualified plans	
f Employee's address and ZIP code		13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12a	
		14 Other		12b	
				12c	
				12d	
15 State PA		16 State wages, tips, etc. \$50,000.00		17 State income tax \$1,535.00	
		18 Local wages, tips, etc. \$50,000.00		19 Local income tax \$800.00	
				20 Locality name TGP	

Form **W-2** Wage and Tax Statement **2020** Department of the Treasury—Internal Revenue Service  
Copy 1—For State, City, or Local Tax Department

Internal Revenue Service  
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

### Wage and Income Transcript

Request Date: 07-23-2013  
Response Date: 07-23-2013  
Tracking Number: 000000000000

SSH Provided: 000-00-0000  
Tax Period Requested: December, 2010

Form W-2 Wage and Tax Statement

Employer:  
Employer Identification Number (EIN): 000000000  
ANYWHERE MOVING INC  
123 MAIN STREET  
ANYTOWN, ST 00000-0000



# Student Tax Filing Status

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- [IRS Data Retrieval Tool Instructions](#)
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- You must check the correct box to indicate your (and your spouse's) tax filing status in 2020.

A.  I will not file and am not required to file a 2020 IRS Income Tax Return.

My spouse\* will not file and is not required to file a 2020 IRS Income Tax Return.

B.  I have filed a 2020 IRS Income Tax Return (choose an option below).

My spouse\* has filed a 2020 IRS Income Tax Return (choose an option below).

- [Click here if you \(or your spouse\) did not file taxes in 2020](#)
- If you filed taxes, you must submit copies of your 2020 Tax Information. Choose an option below to view instructions.
  - [Option 1: 2020 Tax Return Transcript](#)
  - [Option 2: Signed 2020 Tax Return](#) (IRS Form 1040)
- **Remember:** Information must be provided for you and your spouse if you were married as of the date you filed the FAFSA.

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I Have a Student Amended  
Taxes Page

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## Instructions for Non-Tax Filers:

- If you (or your spouse) did not file taxes, you must submit a copy of a Verification of Non-Filing Letter from the IRS. Make sure to request a letter for the 2020 Tax Year.
  - [Step-by-Step Instructions](#)
  - You may receive a letter stating *“As of the date of this letter, we have no record of a processed tax-return for the tax period listed above. You may consider this letter a verification of non-filing.”*
  - You may also receive a document indicating *‘No Record of Account’* was filed.
- Either of the above documents may be submitted for verification.

[I/ My spouse was unable to request a Letter.](#)

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## Verification of Non-Filing by Mail

- If you (or your spouse) is unable to request a Verification of Non-Filing online, you may need to request one by mail completing an [IRS Form 4506-T](#).
  - Instructions for [Requesting IRS Documents by Mail](#)
  - Check [Box 7](#) and list [12/31/2020](#) as the Tax Period
  - Mail a copy of the form to the IRS and keep one for your records.
  - The IRS should mail back a Verification of Non-Filing Letter.
  - Submit a copy of this document to our office.
- If you do not receive a letter within 10 days after mailing your request, [contact our office](#).

# Student Taxes Option 1:

Option 1: Attach a copy of your (and/or your spouse's\*) 2020 IRS Tax Return Transcript

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- Submit a copy of your 2020 Tax Return Transcript.
- A Tax Return Transcript will show information from various schedules, if they were filed.
- [Requesting a Tax Return Transcript](#)
- Do not submit any of the following:
  - State Tax Returns.
  - Tax information from a different tax year.



This Product Contains Sensitive Taxpayer Data

Request Date: 05-23-2020  
Response Date: 05-23-2020  
Tracking Number:

Tax Return Transcript

SSN Provided:  
Tax Period Ending:

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

NAME(S) SHOWN ON RETURN:

ADDRESS:

SSN:  
SPOUSE SSN:

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# Student Taxes Option 2:

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- Option 2: Attach a **signed copy** of your (and/or your spouse's\*) **2020 IRS Form 1040** tax return that was submitted to the IRS (**pages 1 and 2 only**), AND
  - Submit a **copy** of the first two pages of your 2020 Tax Return.

Form 1040 Department of the Treasury—Internal Revenue Service (99) 2020 U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  Qualifying widow(er) (QW)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial	Last name	Your social security number
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions.		Apt. no.
City, town, or post office. If you have a foreign address, also complete spaces below.		State ZIP code

**Presidential Election Campaign**  
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change

m 1040 (2020) Page 2

16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/>	16
17	Amount from Schedule 2, line 3	17
18	Add lines 16 and 17	18
19	Child tax credit or credit for other dependents	19
20	Amount from Schedule 3, line 7	20
21	Add lines 19 and 20	21
22	Subtract line 21 from line 18. If zero or less, enter -0-	22
23	Other taxes, including self-employment tax, from Schedule 2, line 10	23
24	Add lines 22 and 23. This is your <b>total tax</b>	24

- **Remember:** Your 2020 Tax Return must have your handwritten signature on it.

- Do not submit any of the following:
  - State Tax Returns.
  - Tax information from a different tax year.

**Sign Here** Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation
Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Spouse's occupation

Joint return? See instructions. Keep a copy for your records.



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**SCHEDULE 1**  
**(Form 1040)**

**Additional Income and Adjustments to Income**

OMB No. 1545-0074

**2020**

Attachment  
Sequence No. 01

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  Your social security number

**Part I** Additional Income

1	Taxable refunds, credits, or offsets of state and local income taxes . . . . .	1	<input type="text"/>
2a	Alimony received . . . . .	2a	<input type="text"/>
b	Date of original divorce or separation agreement (see instructions) ▶ <input type="text"/>		
3	Business income or (loss). Attach Schedule C . . . . .	3	<input type="text"/>

**SCHEDULE 2**  
**(Form 1040)**

**Additional Taxes**

OMB No. 1545-0074

**2020**

Attachment  
Sequence No. 02

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  Your social security number

**Part I** Tax

1	Alternative minimum tax. Attach Form 6251 . . . . .	1	<input type="text"/>
2	Excess advance premium tax credit repayment. Attach Form 8962 . . . . .	2	<input type="text"/>

**SCHEDULE 3**  
**(Form 1040)**

**Additional Credits and Payments**

OMB No. 1545-0074

**2020**

Attachment  
Sequence No. 03

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 1040, 1040-SR, or 1040-NR.  
▶ Go to [www.irs.gov/Form1040](http://www.irs.gov/Form1040) for instructions and the latest information.

Name(s) shown on Form 1040, 1040-SR, or 1040-NR  Your social security number

**Part I** Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required . . . . .	1	<input type="text"/>
2	Credit for child and dependent care expenses. Attach Form 2441 . . . . .	2	<input type="text"/>
3	Education credits from Form 8863, line 19 . . . . .	3	<input type="text"/>

**Student Taxes Option 2, Continued:**

If you filed a Schedule 1, 2, or 3 with your IRS Form 1040, you must also submit a copy of those schedules with your verification forms.

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# Student Amended Taxes Instructions

- If the IRS Data Retrieval was used and the FAFSA indicates a student's taxes were amended, a special page will display on your verification form.
  - Check the correct box to indicate who amended the taxes.
  - Answer questions A, B, and C on the second half of the form.
  - Submit copies of the documents required based on who amended the taxes.

Who amended your 2020 Federal Tax Return?	
<input type="checkbox"/>	<p><b>I did not amend my 2020 taxes, the <u>IRS</u> amended them for me.</b></p> <p><input type="checkbox"/> Attach a copy of your <b>2020 IRS Tax Account Transcript</b>.</p> <ul style="list-style-type: none"><li>○ <i>Instructions for requesting a Tax Account Transcript can be found here: <a href="https://louisville.edu/financialaid/verification/irs-tax-transcript">https://louisville.edu/financialaid/verification/irs-tax-transcript</a>.</i></li><li>○ <i>Please note that you will need to select <b>Tax Account Transcript</b> as the document you request.</i></li></ul>
<input type="checkbox"/>	<p><b>I amended my 2020 taxes.</b></p> <p><input type="checkbox"/> Attach <b>copies</b> of all <b>2020</b> income documents* for each source of <u>employment income</u></p> <p><input type="checkbox"/> Attach a <b>signed copy</b> of your <b>2020 IRS Form 1040X</b>. Ensure there are amounts on Line 1 and Line 8 of the 1040X. The amount from the original return should be in Column A and the amount after amending should be in Column C.</p>





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Submitting a 1040-X

- An IRS Form 1040X is generally submitted to correct the original information provided on an individual's tax return.

Form **1040-X** Department of the Treasury—Internal Revenue Service  
**Amended U.S. Individual Income Tax Return**  
 (Rev. July 2021) Use this revision to amend 2019 or later tax returns.  
 ▶ Go to [www.irs.gov/Form1040X](http://www.irs.gov/Form1040X) for instructions and the latest information. OMB No. 1545-0074

This return is for calendar year (enter year) or fiscal year (enter month and year ended)

Your first name and middle initial Last name Your social security number

- For verification purposes, there need to be amounts on Line 1 and Line 8 of the 1040X. The copy submitted to the office must be signed.

	A. Original amount reported or as previously adjusted (see instructions)	B. Net change—amount of increase or (decrease)—explain in Part III	C. Correct amount
<b>1</b> Adjusted gross income.	<b>1</b>		
<b>8</b> Subtract line 7 from line 6.	<b>8</b>		

**Sign Here**

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Your signature

▶ \_\_\_\_\_ Date \_\_\_\_\_  
Spouse's signature. If a joint return, **both** must sign.

- If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.

**7** Credits. **7** \_\_\_\_\_



# Signing and Submitting Your Forms

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- Signatures must be handwritten!

**Signatures:** *This section must be completed.*

Sign and date this form with a **handwritten signature**. Electronic/typed signatures **are not** acceptable.

**Certification and Signature:** I certify that all the information on this form, and any attached documentation, is true and complete to the best of my knowledge. I understand that if I purposely give false or misleading information, I may be fined up to \$20,000, sent to prison, or both.

**Student's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

- Cursive fonts, typed names, and electronic signatures will not be accepted.

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Do not submit any forms, statements, or attached documents by email.

Please return your signed form and, if applicable, all requested documentation to the UofL Student Financial Aid Office using one of the options below:

*The form must be printed then signed with a handwritten signature(s) before submitting.*

**ULink Financial  
Aid Document  
Upload Option:**

Log into your student **ULink** account at <http://ulink.louisville.edu/>, open your '*Financial Aid*' Tile and select the '*Financial Aid Document Upload*' menu.

For additional information, please visit:  
<https://louisville.edu/financialaid/other-information/financial-document-upload>

**Mail or In Person  
Options:**

Student Financial Aid Office, Houchens Building Room 110  
University of Louisville  
Louisville, KY 40292

**Fax Number  
Option:**

502.852.0182

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### Document Upload Instructions

- Do not submit forms to any other office.
- Submit your forms and required documents as soon as possible.
- Incomplete forms will delay the verification and awarding processes:
  - Missing documents (W-2s, Tax Returns, statements, etc.)
  - Incomplete documents (i.e. Tax Returns and statements without handwritten signatures, unanswered questions on the verification form, etc.)

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## Requests for Additional Information

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- Additional documents may be requested for the following reasons:
  - Confirming tax items required to be verified by the Department of Education.
  - Resolving potential conflicting information between your verification form and your FAFSA.
- Examples include, but are not limited to:
  - Verifying which parent(s) should be reported on the FAFSA.
  - Determining the correct marital status (and household size, if applicable).
  - Verifying the amount of Scholarship or Grant aid included in the Adjusted Gross Income (as reported on the FAFSA).

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## Resources for Income and Tax Documents

- Instructions for using the [IRS Data Retrieval Tool](#)
- Instructions for Requesting IRS Documents:
  - [Wage and Income Transcript](#)
  - [Tax Return Transcript](#)
  - [Verification of Non-Filing Letter](#)
  - [Requesting IRS Documents by Mail](#)

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## Contacting the Office

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- If you need additional assistance or have questions, please feel free to contact our office.
  - [Email - finaid@louisville.edu](mailto:finaid@louisville.edu)
    - *Do not submit any verification documents through email.*
  - Call: (502) 852-5511
  - [Contact us](#)
- The Student Financial Aid Office is located in the Houchens Building (Suite 110) on UofL's Belknap Campus.
  - [Office Hours and Directions](#)

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- [Document Upload Instructions](#)
- Fax: 502-852-0182
  - We recommend calling our office at 502-852-5511 about 15 minutes after faxing to check if we received your documents.
- Mailing Address:  
Student Financial Aid Office  
University of Louisville  
Louisville, KY 40292

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- **Be TIMELY**
  - Submit your verification and all required documents as soon as you can
- **Be INVOLVED**
  - Be aware of any balances, holds, or other action items pertaining to your account at UofL.
  - Although it may not seem like it, verification is only one part of the financial aid process.
- **Verification is a PROCESS**
  - Verification takes time. Remember to submit additional documents and respond to requests from the SFAO as soon as possible.
  - Multiple follow-ups due to missing or incomplete information delay processing.
  - Quick responses to clarify the information submitted ensure the SFAO can process your verification correctly.
- **Focus on SOLUTIONS:**
  - The SFAO's goal is to help you explore your financial aid options.
  - We are here to help! Contact us if you have questions.

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## A Few More Tips

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- Monitor your UofL email and ULINK accounts for updates:
  - Additional information may be requested by email.
  - Additional items may appear on your Tasks List.
  - All information the SFAO requests must be submitted before verification can be processed!
- Remember to include handwritten signatures on all documents.
- Review your Tasks List for any additional items that may need to be completed.
- Contact us if you have questions or need assistance!

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# Other Resources

This is the end of the 2022-2023 Verification Interactive Module. Feel free to use any of the resources below for additional information.

[Verification FAQ](#)

[UofL's Verification Web Resources](#)

[UofL's Student Financial Aid Homepage](#)