2022-2023 Verification
Start-to-Finish

Click Here to Begin!
Choose any of the following links for information and instructions on the Verification Process

- Introduction
- 2022-2023 Verification Due Dates
- Accessing Your Verification Forms
- 2022-2023 Verification Instructions
- Resources for Income and Tax Documents
- Verification T.I.P.S.
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.
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
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:

<table>
<thead>
<tr>
<th>Your Final Term of Enrollment for the Aid Year:</th>
<th>Priority Due Date(3):</th>
<th>Final Deadline(3):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2022</td>
<td>June 24, 2022</td>
<td>November 28, 2022</td>
</tr>
<tr>
<td>Spring 2023</td>
<td>November 28, 2022</td>
<td>April 17, 2023</td>
</tr>
<tr>
<td>Summer 2023</td>
<td>April 17, 2023</td>
<td>July 24, 2023</td>
</tr>
</tbody>
</table>

- **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

Click here to Begin!
Select the Image that Matches Your Verification Form
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.
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.

Include everyone’s name, age, and relationship to you (the student).

This information is required to complete verification.
Including Other People in the Household

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

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

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

- 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.

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

- 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.
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.
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 Data Retrieval Tool
I Have a Student Amended Taxes Page
I Don't Have this Page
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.
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
If you did not work in 2020, check the first box indicating you did not work and made $0.

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.
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.
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)
Student Taxes Option 1:

- 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.
Student Taxes Option 2:

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

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

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.

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

- **Option B**: Complete the next page and include the required documents with this form.

- Required Income Information
- Required Tax Information

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

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.

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.
If your parent worked but did not file taxes, submit copies of their income 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**

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.
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.
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.
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:

- 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.
Parent Tax Option 2:

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

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

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.

If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.
Signatures must be handwritten!

You and your parent must sign the form.

Cursive fonts, typed names, and electronic signatures will not be accepted.
- Do not submit any forms, statements, or attached documents by email!

- **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.)
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:*
- Student Household Information
- Special Circumstances
- Student Income Information
- Submitting Forms
- Additional Information
Student Household Information

- 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.
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

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

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

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.

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

If you checked "Yes" and 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.
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.
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
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.
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

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

- 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.

- **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 your spouse worked, submit copies of your 2020 Income documents.

- 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.

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

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.
Student Taxes Option 2:

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

- **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.
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.
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?**

- I did not amend my 2020 taxes, the IRS amended them for me.
  - Attach a copy of your 2020 IRS Tax Account Transcript.
    - Instructions for requesting a Tax Account Transcript can be found here: [https://louisville.edu/financialaid/verification/irs-tax-transcript](https://louisville.edu/financialaid/verification/irs-tax-transcript)
    - Please note that you will need to select 'Tax Account Transcript' as the document you request.

- I amended my 2020 taxes.
  - Attach copies of all 2020 income documents* for each source of employment income.
  - Attach a signed copy of your 2020 IRS Form 1040X. 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.
An IRS Form 1040X is generally submitted to correct the original information provided on an individual's tax return.

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.

If there is an increase in credits on Line 7, we will need to know if any of those credits are education credits.
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.
Do not submit any forms, statements, or attached documents by email.

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.)
Requests for Additional Information

- 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).
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

Skip to Section:
- Additional Information
- Income and Tax Resources
- Contacting the Office
- Tips to Remember
If you need additional assistance or have questions, please feel free to contact our office.

- **Email**: 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**
**Additional Office Information**

- **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
T. I. P. S. to Remember

- **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.
A Few More Tips

- 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!
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