2021-2022 Verification
Start-to-Finish

Click Here to Begin!

Student Financial Aid Office
University of Louisville
Louisville, KY 40292
Choose any of the following links for information and instructions on the Verification Process.

- Introduction
- Verification Due Dates
- 2021-2022 Verification Instructions
- Accessing Forms
- Resources for Income and Tax Documents
- Verification T.I.P.S.
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 reviewed.
- *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 2019 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</th>
<th>Final Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2021</td>
<td>June 25, 2021</td>
<td>November 29, 2021</td>
</tr>
<tr>
<td>Spring 2022</td>
<td>November 29, 2021</td>
<td>April 18, 2022</td>
</tr>
<tr>
<td>Summer 2022</td>
<td>April 18, 2022</td>
<td>July 25, 2022</td>
</tr>
</tbody>
</table>

For Federal Pell Grant eligibility review only: Verification must be completed by 9/9/2022, or 120 days after the last date of the student's 2021-2022 academic year enrollment, whichever is earlier.

- **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.
  - 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 additional assistance with other forms that have been assigned to you.*
2021-2022 Verification Instructions

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

2021-2022 Dependent Verification Form

Student Name: ___________________________ Student ID: ____________

2021-2022 Independent Verification Form

Student Name: ___________________________ Student ID: ____________
2021-2022 Dependent Student 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 to the previous or next slide in the module.

- Use the navigation menu to go to a specific set of instructions.

*Skip to Section:*
- Parent Household Information
- Special Circumstances
- Student Income Information
- Parent Income Information
- Submitting Forms
- Additional Information
Parent Household Information

- List the parent you included on the FAFSA.

- If that parent was married as of the date the FAFSA was filed, include their spouse in the household section.

- Include your parent’s other children if they meet either of the following criteria:
  
  A. Your parent(s) will provide more than half of their support from July 1, 2021 through June 30, 2022, OR
  B. The children would be required to provide parental information if they were completing a 2021-2022 FAFSA.

Include each person’s 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, 2021 and June 30, 2022.

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

Other people 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, 2022.

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 each of 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.

- 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

- **Note:** If the IRS Data Retrieval was used and the FAFSA indicates a student’s or parent’s taxes were amended, the Student Financial Aid Office will follow up for additional information.

If a student or parent amended their taxes, submit copies of the following documents with the verification forms:

- Copies of all 2019 income documents: W-2s, or a 2019 Wage and Income Transcript from the IRS.
- A signed copy of the 2019 Tax Return (IRS Form 1040) showing the original information, or a copy of a 2019 Tax Return Transcript from the IRS.
- A signed copy of a 2019 1040X showing the changes between the original and amended tax returns.
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.
Marital Status Change Instructions

If a student or parent’s marital status has changed since January 1, 2020:

- Check the box for student or parent.
- Complete the statement on the verification form:

  Marital Status Change:
  If you are separated, divorced, or widowed and filed a joint 2019 IRS Income Tax Return, or you are married to someone other than the individual included on your joint 2019 IRS Income Tax Return. **You must complete the following:**
  
  My marital status changed from: __________ to __________ as of ________(month) ________(year)

- Attach 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 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

- IRS Data Retrieval Tool (Recommended)
- Submit Income and Tax Documents
- I Already Used the IRS Data Retrieval Tool
- I Don’t Know if I used the IRS Data Retrieval Tool
- I Don’t Have This Page

**Option A:** Use the IRS Data Retrieval Tool to update your FAFSA and skip the next two pages of this form:

*Student Financial Aid Office’s Recommended Option*

**Option B:** Complete the next two pages of this form and include the required documents with this form.
Using the IRS Data Retrieval Tool is strongly recommended!

- It allows you to transfer your information from the IRS directly into your FAFSA.
- 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.

You must sign and resubmit the FAFSA!
- Include the date you resubmitted your FAFSA on your verification form.
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 and Student Tax Return Verification Pages and submit appropriate documentation.

If you updated your FAFSA using the IRSDRT, please skip the next two pages:

- Student Income Verification and Student Tax Return Verification.

We will contact you if any additional information is needed.

The next two pages must be completed if you choose Option B.
Student Income Earned from Work

- Check the correct box to indicate whether or not you worked in 2019.
  - I did not work in 2019. My 2019 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 2019. Complete the following table and attach your 2019 income document(s) to this form.

- If you did work, complete the table on the form:
  - List where you worked in 2019.
  - Include how much you earned from each employer.
  - Write the total amount you earned from working.

<table>
<thead>
<tr>
<th>Employer Name(s)</th>
<th>Copy of 2019 income document* attached?</th>
<th>Student's Amount Earned in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

How much did you (the student) earn from working in 2019? Add the amounts listed above and any amounts reported on a separate page. $__________
If you worked, submit copies of your 2019 Income documents with your verification form.

*Acceptable 2019 Income Documents:
- IRS W-2 Form(s)
- IRS Wage and Income Statement
- Schedule C(s)

- 2019 W-2s
- 2019 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**
You must check the correct box to indicate your tax filing status in 2019.

A. □ I will not file and am not required to file a 2019 IRS Income Tax Return.

B. □ I have filed a 2019 IRS Income Tax Return.

If you filed taxes, you must submit copies of your 2019 Tax Information. Choose an option below to view instructions.

Option 1: 2019 Student Tax Return Transcript

Option 2: Signed 2019 Tax Return (IRS Form 1040)
Student Taxes Option 1:

Submit a copy of your 2019 Tax Return Transcript.

A Tax Return Transcript will show information from various schedules, if they were filed.

_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 2019 Tax Return.

Note: Some versions of the IRS Form 1040 may provide information on a single page.

Remember: Your 2019 Tax Return must have your handwritten signature on it.
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.

### Schedule 1 (Form 1040 or 1040-SR)

**Part I: Additional Income**
- Taxable refunds, credits, or offsets of state and local income taxes.
- (2a) Alimony received.
- (2b) Date of original divorce or separation agreement (see instructions).
- (3) Business income or losses. Attach Schedule C.

**Part II: Additional Income**
- (1) Alternative minimum tax. Attach Form 6251.
- (2) Excess advance premium tax credit repayment. Attach Form 8962.
- (3) Add lines 1 and 2. Enter here and include on Form 1040 or 1040-SR, line 12b.

### Schedule 2 (Form 1040 or 1040-SR)

**Part I: Additional Taxes**
- (1) Alternative minimum tax, Attach Form 6251.
- (2) Excess advance premium tax credit repayment, Attach Form 8962.

### Schedule 3 (Form 1040 or 1040-SR)

**Part I: Nonrefundable Credits**
- (1) Foreign tax credit. Attach Form 1116 if required.
- (2) Credit for child and dependent care expenses. Attach Form 2441.
- (3) Education credits from Form 8863, line 19.
- (4) Retirement savings contributions credit. Attach Form 8880.

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- Student Income Menu
- IRS Data Retrieval Tool Instructions
- Required Income Information
- Required Tax Information
- Skip to Parent Income and Tax Options
Parent Income and Tax Options

Choose a link to view the instructions for each option.

- IRS Data Retrieval Tool
  - **Option A:** Use the IRS Data Retrieval Tool to update your FAFSA and skip the next two pages of this form. *(Student Financial Aid Office’s Recommended Option)*

- Submit Income and Tax Documents
  - **Option B:** Complete the next two pages and include the required documents with this form.

- My Parent 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
Using the IRS Data Retrieval Tool is strongly recommended!

- It allows you to transfer your information from the IRS directly into your FAFSA.
- 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.

If you choose to use the FAFSA IRS Data Retrieval Tool:

1. Follow the instructions on the UofL Student Financial Aid Office's website at https://louisville.edu/financialaid/verification/irs-data-retrieval, or contact us at (502) 852-5511.
2. Check the box below if you updated your FAFSA using the IRSDataRT and indicate the date you signed and submitted the FAFSA correction.

- □ 2021-2022 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.
Next Steps

Choose the next section of instructions from the options below.

- My parent used the IRS Data Retrieval Tool. What’s next?
  - If your parent(s) updated your FAFSA using the IRSDRT, please skip the next two pages:
    - Parent Income Verification and Parent Tax Return Verification.
    - We will contact you if any additional information is needed.
  - 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 and Parent Tax Return Verification Pages and submit appropriate documentation.
  - Parent Income Page
  - Parent Tax Information
Your parent must check the box to let us know whether or not they earned income from working in 2019.

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 2019.
If your parent(s) worked, they need to complete the table(s) on the form:
- List where they worked.
- Include how much they earned from each employer.
- Write their total earnings at the bottom of the table.

<table>
<thead>
<tr>
<th>Employer Name(s)</th>
<th>Copy of 2019 income document* attached?</th>
<th>Parent 1 Amount Earned in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐</td>
<td>$</td>
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<tr>
<td></td>
<td>☐</td>
<td>$</td>
</tr>
</tbody>
</table>

How much did Parent 1 earn from working in 2019?
Add the amounts listed above and any amounts reported on a separate page.

<table>
<thead>
<tr>
<th>Employer Name(s)</th>
<th>Copy of 2019 income document* attached?</th>
<th>Parent 2 Amount Earned in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐</td>
<td>$</td>
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<td>$</td>
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<tr>
<td></td>
<td>☐</td>
<td>$</td>
</tr>
</tbody>
</table>

How much did Parent 2 earn from working in 2019?
Add the amounts listed above and any amounts reported on a separate page.
If your parent worked, submit copies of their 2019 Income documents.

*Acceptable 2019 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

- 2019 W-2s
- 2019 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(s) must check the correct box to indicate their tax filing status in 2019.

A. □ (parent 1 name) will not file and is not required to file a 2019 IRS Income Tax Return.
   □ (parent 2 name) will not file and is not required to file a 2019 IRS Income Tax Return.

B. □ (parent 1 name) has filed a 2019 IRS Income Tax Return.
   □ (parent 2 name) has filed a 2019 IRS Income Tax Return.

If either parent filed taxes, they must submit copies of their 2019 Tax Information. Choose an option below to view instructions.

My parent(s) did not file taxes

Option 1: 2019 Parent Tax Return Transcript

Option 2: Signed 2019 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 2019 Tax Year.

  - 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
Requesting a 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 a IRS Form 4506-T.

- Check Box 7 and list 12/31/2019 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, please contact our office.
Parent Tax Option 1:

- Submit a copy of your parent’s 2019 Tax Return Transcript.

- A Tax Return Transcript will show the information from various schedules, if they were filed.

- Do not submit any of the following:
  - State Tax Returns.
  - Tax information from a different tax year.
Parent Taxes Option 2:

- Submit a copy of the first two pages of your 2019 Tax Return.
  - **Note:** Some versions of the IRS Form 1040 may provide information on a single page.

Remember: Your parent’s 2019 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 Taxes 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.
Signing and Submitting Your Forms

- 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!

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 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 switch between slides.

Use the navigation menu to go to a specific set of instructions.
List yourself.

If you were married as of the date you filed the FAFSA, list your spouse.

Include your children if you will provide more than half of their financial support from July 1, 2021 through June 30, 2022.

Include each person's age and relationship to you (the student).

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

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, 2022.

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

Other people 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, 2022.

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 each of 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.

- 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

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.

If a student or their spouse amended their taxes, submit copies of the following documents with the verification forms:

- Copies of all 2019 income documents: W-2s, or a 2019 Wage and Income Transcript from the IRS.
- A signed copy of the 2019 Tax Return (IRS Form 1040) showing the original information, or a copy of a 2019 Tax Return Transcript from the IRS.
- A signed copy of a 2019 1040X showing the changes between the original and amended tax returns.

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.
Marital Status Change Instructions

- If a student's (or their spouse's) marital status has changed since the January 1, 2020:
  - Check the box to indicate whether your and/or spouse's marital status has changed.
  - Complete the statement(s) on the verification form.
  - Include a copy of supporting documentation of the marital status change (i.e. divorce decree, marriage or death certificate, separation agreement, etc.) with your verification forms.

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.

- IRS Data Retrieval Tool
  - Option A: Use the IRS Data Retrieval Tool to update your FAFSA and skip the next two pages of this form:
    - Student Financial Aid Office’s Recommended Option

- Submit Income and Tax Documents
  - Option B: Complete the next two pages of this form and include the required documents with this form:

- I Already Used the IRS Data Retrieval Tool
- I Don’t Know if I Used the IRS Data Retrieval Tool
- I Don’t Have this Page
Using the IRS Data Retrieval Tool is strongly recommended!

- It allows you to transfer your information from the IRS directly into your FAFSA.
- 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.

You must sign and resubmit the FAFSA!

- Include the date you resubmitted your FAFSA on your verification form.
Next Steps

Choose the next section of instructions from the options below.

- I used the IRS Data Retrieval Tool. What's next?
  - If you updated your FAFSA using the IRSDRT, please skip the next two pages:
    - Student Income Verification and Student Tax Return Verification.
    - We will contact you if any additional information is needed.

- I was unable (or do not want) to use the IRS Data Retrieval Tool. What do I do?
  - You must complete the Student Income and Student Tax Return Verification Pages and submit appropriate documentation.
Check the box to let us know whether or not you earned income from working in 2019.

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 2019.
If you and/or your spouse worked, you need to complete the table(s) on the form:
- List where you worked.
- Include how much you earned from each employer.
- Write your total earnings at the bottom of the table.

<table>
<thead>
<tr>
<th>Employer Name(s)</th>
<th>Copy of 2019 income document* attached?</th>
<th>Student's Amount Earned in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

How much did you (the student) earn from working in 2019? Add the amounts listed above and any amounts reported on a separate page.

$___________

<table>
<thead>
<tr>
<th>Employer Name(s)</th>
<th>Copy of 2019 income document* attached?</th>
<th>Spouse's Amount Earned in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

How much did your spouse earn from working in 2019? Add the amounts listed above and any amounts reported on a separate page.

$___________
If you and/or your spouse worked, submit copies of your 2019 Income documents:

- 2019 W-2s
- 2019 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 tax filing status in 2019.

A. □ I will not file and am not required to file a 2019 IRS Income Tax Return.
□ My spouse will not file and is not required to file a 2019 IRS Income Tax Return.

B. □ I have filed a 2019 IRS Income Tax Return.
□ My spouse has filed a 2019 IRS Income Tax Return.

If you filed taxes, you must submit copies of your 2019 Tax Information. Choose an option below to view instructions.

I / My spouse was not required to file taxes.
Option 1: Student 2019 Tax Return Transcript
Option 2: Signed 2019 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 2019 Tax Year.

  - 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.
Requesting Verification of Non-Filing by Mail

- If you (or your 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.
  - Check Box 7 and list 12/31/2019 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 2019 Tax Return Transcript.
- A Tax Return Transcript will show information from various schedules, if they were filed.

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 2019 Tax Return.

- **Note:** Some versions of the IRS Form 1040 may provide information on a single page.

**Remember:** Your 2019 Tax Return must have your handwritten signature on it.

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Instructions:
- **Required Income Information**
- **Required Tax Information**
- **Skip to Submitting Forms**
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.
Signatures must be handwritten.

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

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 process:

- 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.).

### How to submit this form:

Return all pages of this form along with copies of required supporting documentation by mail, fax, or in person at:

<table>
<thead>
<tr>
<th>Undergraduate, Graduate, Law and School of Medicine Students:</th>
<th>Mail / In Person:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Student Financial Aid Office (Houchens Room 110)</td>
</tr>
<tr>
<td></td>
<td>University of Louisville</td>
</tr>
<tr>
<td></td>
<td>Louisville, KY 40292</td>
</tr>
</tbody>
</table>

Fax: (502) 852-0182
Requests for Additional Information

Additional documents may be requested for the following reasons:

- Confirming tax items required to be verified by the U. S. Department of Education.
- Resolving potential conflicting information between your verification form and your FAFSA.

Examples include, but are not limited to:

- A Marital status conflicting with appropriate Tax Filing status.
- Verifying the amount of Scholarship or Grant aid included in the Adjusted Gross Income (as reported on the FAFSA).
- In cases of a marital status change, ensuring the correct tax information is included on the FAFSA.
Resources for Income and Tax Documents

Choose one of the links below to view step-by-step instructions for providing or requesting the information needed to complete verification:

- IRS Data Retrieval Tool Instructions
- Requesting a Tax Return Transcript
- Requesting a Wage and Income Transcript
- Requesting a 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
Contacting the Office

- If you need additional assistance or have questions, please feel free to contact our office.
  - Email - finaid@louisville.edu
  - Note: Do not submit your verification forms or any documents by email.
  - Call: (502) 852-5511

The Student Financial Aid Office is located in the Houchens Building (Suite 110) on UofL's Belknap Campus.
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.

**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 will 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.
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!
This is the end of the 2021-2022 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

Student Financial Aid Office
University of Louisville
Louisville, KY 40292