FAFSA Verification and IRS Data Retrieval Tool Help and Tips

What is verification?

Each year students and their families apply for financial aid by submitting a Free Application for Federal Student Aid (FAFSA) to help meet higher education expenses. Some applicants are asked to provide supporting documents to verify the information on the FAFSA through a process called verification. The supporting documentation is used by the financial aid office to double check the FAFSA information and make corrections if needed.

Verification is an important process used to ensure that the right amount of financial aid is provided to the right students at the right time. You and your family along with all tax payers would want no less when it comes to taking care that your tax dollars are awarded accurately in the financial aid process.

Why was I selected for verification?

There are various reasons why a FAFSA applicant may be selected for verification. Perhaps the FAFSA included estimates of federal income tax information and the actual information now needs to be confirmed. Or maybe the FAFSA was submitted with data that appears inconsistent or unusual, or includes the type of information that is frequently misreported. Finally, you may have been selected for verification through a random process used to get a sampling of how accurately families fill out the FAFSA. You are in good company, though. Each year we select well over 2,000 applications for verification.

What happens if I do not provide the verification information requested?

If you do not provide the verification documentation, you are not eligible for federal or state financial aid. You also are ineligible for many forms of financial aid that your college may have to offer. So, please submit the requested verification information promptly to avoid a delay in your financial aid application processing!
What can I do to make sure the verification information I provide is accurate and complete?

- Carefully read the verification letter and verification worksheet. When completing the worksheet respond to every question. Do not leave any lines blank. If the correct answer is zero, write in a 0.

- Submit all documentation requested such as the Verification Worksheet and student and parent W-2 forms. Submit your tax data by using the IRS Data Retrieval Tool if you are eligible or an IRS Tax Transcript if you are not eligible to use the IRS data retrieval tool. See the information on the IRS Data Retrieval Tool below.

- Do not submit incomplete materials. Wait until you have all your verification materials before submitting your verification packet.

- Preferred Document Attachment Order:
  1. Verification Worksheet
  2. W2 forms
  3. Student’s IRS Tax Return Transcript (if unable to use IRS data retrieval tool)
  4. Parent’s IRS Tax Return Transcript (if unable to use IRS data retrieval tool)

- Do not submit unrequested documents such as copies of tax returns, tax schedules, tax year comparison reports, or state tax returns.

- Keep your originals – send us copies.

- Make sure the Verification Worksheet is signed by the student and one of the parents who’s information is reported on the FAFSA.

- Make sure that you provide all of the W-2 earnings statements you received from employers. The total earnings shown in box 1 of the student W-2’s must match the Wages, Salaries & Tips line of the IRS tax transcript. The same goes for parents.
  - If you are missing a W-2, contact your employer for a replacement copy.
  - Sometimes people receive earnings reportable on the tax return where a W-2 is not required from an employer. In this circumstance, include a written description of the amount and source of income and include any supporting document you may have regarding this income.
• When you submit your verification documentation, make sure to include the student name and Western ID number at the top of your W2 forms and on the IRS tax transcript (if you are ineligible to use the IRS data retrieval tool).

• Provide all Verification Information Promptly

Please provide your verification information as quickly as possible. Given the large number of financial aid applications we receive, it may take an extended time before we work on your aid application; however, we process the completed applications in the order we receive them.

Sometimes while reviewing the verification information we find inconsistent information or errors that must be resolved which may create delays in processing. You can help avoid this delay by making sure that you provide accurate and complete verification information. In some circumstances we may need to request additional information from you, so watch carefully for new correspondence from us.

**What if I requested a filing extension for my tax return?**

If you filed for an extension, let us know when you expect to file your tax return. Once you complete your tax return you can then send us your IRS tax transcript (if you cannot use the IRS data retrieval tool). Important Note: we must discontinue our work on your financial aid application until we receive all of your verification documentation.

**Can I send copies of my tax returns?**

No. Federal verification regulations now require students and families to use the IRS Data Retrieval Tool, or, submit a copy of the IRS tax return transcript if they are ineligible to use the IRS data retrieval tool.

**Watch out for the three most common errors!**

1. Do not leave any line blank where indicated on the verification form. If the correct value is zero, write 0.
*Students submitting the form electronically from their Western assigned email account do not need to sign the form.

### Am I eligible to use the IRS Data Retrieval Tool (DRT)?

Most students and parents can use the DRT. However, students and parents who are married but filed separate tax returns cannot use the IRS Data Retrieval Tool. Other tax filing statuses ineligible for the IRS Data Retrieval Tool include:

- Filing as Head of Household;
- Filing an amended return; and
- Puerto Rican or foreign returns

Students and parents unable to use the IRS Data Retrieval Tool must submit a copy of their IRS Tax Return Transcript. *Do not submit copies of your tax returns!*

If you file an amended return you will needed to provide an IRS Tax Account Transcript in addition to the IRS Tax Return Transcript since these two documents together provide the necessary information for verification purposes.
Is the IRS Data Retrieval Tool easy to use?

Yes! From the FAFSA Financial Information tab, click IRS Data Retrieval Tool to view and transfer your tax information directly from the IRS.

1. Your FAFSA will be saved and you will be transferred to the IRS Web site.
2. On the IRS Web site, enter the requested information.
3. Once the IRS has validated your identification, your IRS tax information will display. You can either transfer your information from the IRS, or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return from the IRS Web site, you will have to login to open your saved FAFSA.
4. If you transfer your IRS tax information, questions that are populated with tax information will be marked with “Transferred from the IRS.”

For most students, the DRT will provide all required tax data*. Students and parents unable to use the IRS Data Retrieval Tool must submit a copy of their IRS Tax Return Transcript.

* In some cases, the tax transcript may be needed in addition to the data submitted by using the IRS data retrieval tool.

Do you have additional questions?
Please contact the WWU Financial Aid Services Center at 360-650-3470.