

If your FAFSA is selected for verification; *Federal Tax Return Transcripts, W-2 forms and additional financial information* may be needed to complete your financial aid file. Your financial aid will be estimated and cannot be finalized nor can it credit to your student account until the requested items have been received and reviewed.

Below are some helpful hints to insure submitted items are correct and complete.

Federal Tax Return Transcripts

You must either import your tax return data directly to the FAFSA by using the IRS import feature on the FAFSA (see page 2 for instructions) or you must request a Tax Return Transcript directly from the IRS. (See page 2 for instructions.)

When will your tax transcripts be available?

- A. If you were not required to send a payment to the IRS, your transcript information should be available two weeks after filing electronically or eight weeks after filing by mail.
- B. If you had to send the IRS a payment, your transcript should be available after May 1st if you filed electronically and after June 1st if you filed by mail.
- C. If you filed for an extension, your transcript should be available two weeks after your final return is filed.

Please also note:

- If you filed an amended return, you will need to send us a signed copy of your original tax transcript and a copy of the 1040X form.
- If you're married but you and your spouse filed separate returns, you are not eligible for the import and must request copies of both tax transcripts.
- Foreign tax filers: Please provide a signed copy of your foreign tax return (and the currency exchange rate if not in U.S. dollars).
- Same-sex couples must report their marital status as married if they were legally married in a state or other jurisdiction that permits same-sex marriage, without regard to where the couple resides.

What if I didn't file a tax return?

If you did not file and were not required to file a federal tax return, you must complete a **Verification of Non-Filing Letter** (VONF) from the IRS site Form 4506-T and send it to the Office of Financial Aid. You can either mail, fax or email us this information.

Do you need to file a tax return?

Please refer to www.IRS.gov for more specific filing requirements, but typically you must file if:

- A. You are married and your combined gross income is more than \$20,700 (if filing separate: must file with income over \$4,050)
- B. You are single (with a dependent-filing as head of household) and gross income is more than \$13,350
- C. You are single (and parents claim you on their tax return) and earned income is more than \$6,300
- D. You are single (and parents cannot claim you on their tax return) and gross income is more than \$10,400

Which parent's W-2 and tax information do we need?

- A. If parents are married to each other, we need tax information for both parents.
- B. If parents are divorced and **custodial parent*** is **not** remarried, we need tax information for your custodial parent only.
- C. If parents are divorced and **custodial parent*** is **remarried**, we need tax information for your parent and step-parent.
- D. If parent is single (or widowed and not remarried), we need tax information for that parent only.
- E. If parents are not married, but live together, we need tax information for both parents.

***For divorced parents, the custodial parent is the parent who you have lived with most during the 12 months prior to filing the FAFSA. If you lived equally with both parents, then the parent who provided more financial support is the custodial parent.**

Using the FAFSA IRS Retrieval Tool

1. Sign in at <https://fafsa.gov>.
2. Select **Make A Correction**. (Select Continue if you started a FAFSA, but haven't submitted it yet.)
3. Choose **Financial Information Tab**
4. First question on page needs to be answered: **Already Completed**.
5. Then review the check boxes to see if any of these circumstances apply, if not, select **None of the Above**.
You **cannot** use the retrieval tool if any of the following apply (please see options below to request your tax return transcript):
 - a. Married, filing separately
 - b. Married, but one or both filed as Head of Household
 - c. Filed an amended tax return
 - d. Filed a Puerto Rican or foreign tax return
6. You will be presented with the option to Link to the IRS:
 - a. Click **link to IRS** and continue to select OK as you are being directed to IRS website.
 - b. Fill in filing status
 - c. Fill in address information
 - d. Click **Submit**
 - e. Check the box for "Transfer My Tax Information into the FAFSA" and then Select **Transfer Now**.
7. Once back into FAFSA, go to bottom of screen and click **Save**, then click on **Next**.
8. To complete the **Student's IRS Data retrieval**, repeat steps 4-7.
9. **IMPORTANT STEP:** Once back into FAFSA, Save and Submit your FAFSA by signing with your FSA ID, agreeing to their terms, and then click **Submit**.

To request a Tax Return Transcript from the IRS, you may:

1. Go to the IRS website at <https://www.irs.gov> and click on Get My Tax Record." Click on "Get Transcript Online." You may print one on-line or you can order one and have it sent via mail.
2. Download the IRS2GO App. If you have an Apple iPhone, or iPod Touch you can download the free IRS2Go app by visiting <https://iTunes.apple.com>. If you have an Android device you can visit <https://play.google.com> to download the free IRS2Go app.
3. Call the IRS at 1-800-908-9946.
4. Complete the IRS form 4506-T on-line or you can print a paper copy and mail to the IRS.

W-2 Forms

If employed the prior year and a tax return was filed W-2 forms are needed for everyone listed on the FAFSA.

If a federal tax return **was not filed** you will need to submit a **Verification of Non-filing Letter** using form 4506-T .

If you **did not file**, but still had wages then you are required to submit a **Wage and Income Tax Transcript** also available at <https://www.irs.gov>.

All forms can be requested from the IRS.gov site or you may complete the **4506-T** form and have these documents mailed to you. The **4506-T** form does provide a section that allows you to have reports sent to a third party as long as the name and address appear on the form.

Instructions to obtain Verification of Non-filing:

1. Go to <https://www.irs.gov>, click on Forms & Instructions
2. On the next page scroll down until you find form **4506-T**
3. Click on the form and a PDF will open. Fill out 1a, 1b, 3 and 5 if you are sending this to a third party.
4. Then check the box to the right of 7 (Verification of Non-filing).
5. Also check the box to the right of 8 (Form W-2, Form 1099), regardless of whether or not you worked.
6. On page 2, find the address or fax number of the IRS office closest to your home and send the form.
7. The IRS will send you a letter of verification of Non-filing and a Wage and Income Transcript.

Additional Financial Information

In addition to the Tax Transcripts and the W-2 forms, you may be asked to submit supplementary documents available on our website at www.valpo.edu/student-financial-services. If requested, these downloadable forms provide information necessary to complete the verification process. The most commonly requested forms include: **Dependent or Independent Verification Worksheet, FAFSA signature page or Asset worksheet**. **Please be sure to check the "My documents" section of DataVU to view all needed documents.**

Please submit all requested items to: Office of Financial Aid, Kretzmann Hall,
1700 Chapel Drive, Valparaiso, IN 46383
Phone: 219-4645015 Fax: 219-464-5012
Email: FinAid@valpo.edu