

## What Does Verification Mean?

Verification is a process initiated by the U.S. Department of Education, where the information provided on the Free Application for Federal Student Aid (FAFSA) is compared with the student (and parent/spouse) tax information and/or other financial documents that were submitted to the IRS. The selection of an application for verification does not mean the information provided is incorrect. Some applications are selected for review on a random sample basis, and some applications are selected based upon a set of common edits that check data for consistency and logic. If there are discrepancies between the FAFSA and the financial documents, The Office of Financial Assistance will send the necessary corrections electronically to the Central Processor.

If you are selected for verification:

1. Download the appropriate Verification worksheet
2. Complete, sign, and return the worksheet with appropriate tax information for the calendar year preceding the academic year for which you are applying.
3. Monitor your Hornet e-mail. If additional information/documents are needed, they will be requested via email. **The University reserves the right to request additional documents to confirm any information provided. (i.e. SNAP, child support paid, etc.)**

**NOTE:** It is important that the verification process be completed in a timely manner. Students are strongly encouraged to complete their FAFSA by April 1st, which is the priority filing date, to avoid delays in receiving both notice and disbursement of their financial aid. If you are selected for verification, you will not be eligible for any federal or state aid until all of the necessary documentation is received and the review is complete. Upon completion of the verification process, the Office of Financial Assistance will determine your financial aid eligibility and will send an email notification that instructs you to review your financial aid in MyHSSU.

**Due to changes in the federal regulations, the Department of Education is no longer allowing students (parents) to self-report their income. This means that the Office of Financial Assistance no longer accepts tax forms. Students who are selected for verification can choose from two options to verify their federal income tax information:**

1. **Use the IRS Data Retrieval Option on the FAFSA (preferred)**
2. **Request a copy of student/parent tax transcript from the IRS and submit it to the Office of Financial Assistance.**

The IRS Data Retrieval Tool allows students and parents to access the IRS tax return information needed to complete the Free Application for Federal Student Aid (FAFSA). Students and parents may transfer the data electronically into their FAFSA.

If you are eligible to use the IRS Data Retrieval Tool, we prefer you use the tool for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You won't need to provide a copy of your or your parents' tax returns to HSSU.

If you have not already used the tool, go to [www.FAFSA.gov](http://www.FAFSA.gov), log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information onto your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool contact the Office of Financial Assistance.

- **If you opt to use the IRS Data Retrieval Tool you must ensure that your adjusted gross income, earned income from work and any relevant tax credits are entered correctly on your FAFSA.**

If you do not use the IRS Data Retrieval Tool to provide tax information and HSSU requests a copy of your tax return or your parents' tax return, you will be required to obtain an official tax transcript from the IRS. The official free IRS transcript can be requested by:

1. Go to [www.IRS.gov](http://www.IRS.gov) and click on the "Order a Return or Account Transcript" link
  - a. You will need your Social Security Number, date of birth, and the address listed on the latest tax return filed.
  - b. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript."
2. Call 1-800-908-9946.
  - a. You will need your Social Security Number, date of birth, and the address listed on the latest tax return filed.
  - b. Select "Option 2" to request an IRS Tax Return Transcript and then enter "2011."
3. Download IRS Form 4506T-EZ at [www.IRS.gov/pub/irs-pdf/f4506tez.pdf](http://www.IRS.gov/pub/irs-pdf/f4506tez.pdf)
  - a. Complete lines 1-4, following the instructions on page 2 of the form. Note that line 3 should be the most current address on file with the IRS. This is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on line 4.
  - b. Line 5 provides you with the option to have your IRS Tax Return Transcript mailed directly to a third party by the IRS.
  - c. Enter "2011" on line 6 to receive IRS tax information on the 2011 tax year that is required for the 2012-2013 FAFSA.

- d.** You must sign and date the form and enter your telephone number. Only one signature is required to request a transcript for a joint return.
- e.** Mail or fax the completed IRS Form 4506T-EZ to the appropriate address or fax number provided on page 2 of Form 4506T-EZ.
- f.** Processing Form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax you that it was not able to provide the transcript. If successfully validated, you can expect to receive a paper IRS Tax Return Transcript, at the address included in your request.

It can take up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you are married and you and your spouse filed separate 2011 tax returns, you must submit tax return transcripts for both you and your spouse.