



Student Financial Services

2019-2020 Independent Verification Information

You have been selected for verification; you must complete the verification process to be eligible for financial aid. The law says we have the right to ask you for this information before awarding Federal aid. The sooner we verify your information, the sooner you'll be able to receive financial aid if you're eligible. If there are differences between your application information and your financial documents, the FAFSA may need corrections. **Verification should be completed prior to the start of the school term or within 60 days for students who file after the start of the term. Continuing students will not be awarded until verification is completed.**

Independent Student Verification for 2019-2020

Verification is a process to confirm information you provided on the FAFSA. You must provide the following:

- You (and if married your spouse) must complete, sign and submit a 2019-20 Independent Verification Worksheet. This form can be obtained from the Quincy University Student Financial Services Office or request the form via email at financialaid@quincy.edu.
- If you (and if married your spouse) are a tax filer, you may submit tax information by using the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2017 IRS income information into your FAFSA, or if you are unable or chose not to use the IRS Data Retrieval Tool, then you must submit to the Student Financial Services Office 2017 IRS Tax Return Transcripts. Schools are NO longer allowed to accept paper tax returns for verification.
- If either you and/or your spouse will not file and are not required to file a 2017 income tax return with the IRS, then you (if married and/or your spouse is nonfiler) must complete the student nonfiler section of the Verification Worksheet. If either of you had earnings from employment in 2017 then you must also submit a copy of 2017 W-2 forms from all employers.
- If either you and/or your spouse are nonfilers, you and/or your spouse must also provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 income tax return was not filed with the IRS or other relevant tax authority.

Verification ensures that the information students report is accurate. Please refer to the back of this form for additional information on the IRS Data Retrieval process or how to request IRS Tax Return Transcripts. The sooner verification is completed; the sooner financial aid eligibility can be confirmed.

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Tax Information For Verification

Per the Federal Register Notice published March 28, 2018 regarding FAFSA information subject to verification and acceptable documentation for the 2019-20 award year, acceptable documentation of a tax filer's information is either unaltered data transferred to FAFSA on the Web using the IRS Data Retrieval Process or the IRS Tax Return Transcript obtained from the IRS.

IRS Data Retrieval Tool

The best way to meet requirements to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and select the "Financial Information" tab. Change the tax filing status to "Already Completed". The FAFSA will ask several questions to determine if the student/spouse are eligible for the IRS DRT. Enter your FSA ID and click on "LINK TO IRS". It will ask for your permission to redirect you to the IRS website – click "OK". Enter the name and address exactly as it appears on your Federal Tax Return, and click "Submit". Once accuracy has been ensured, the student/spouse should indicate "Transfer My Tax Information into the FAFSA" and click "Transfer Now". You will be redirected back to the FAFSA.gov and you should receive a message: "You have successfully transferred your 2017 IRS tax information". Once returned to the FAFSA, students and spouse if married should be able to see text indicating that information has been "Transferred from the IRS". The transferred information will be masked and cannot be viewed by the student. Students should not make any changes to any of the transferred information, as doing so will nullify the transfer process. Make sure to sign and submit the FAFSA with the Student FSA ID information. You should receive a Confirmation Page stating that you have successfully submitted changes to your FAFSA.

An aid applicant is unable to utilize the IRS Data Retrieval Tool and will have to submit an IRS Tax Return Transcript to complete verification if: (a) The student is married and either the student or his/her spouse filed as Married Filing Separately; (b) The student is married, and either the student or his/her spouse filed as Single or Head of Household in 2017; (c) The student filed an amended tax return; or, (d) The student/spouse filed a Puerto Rico or foreign tax return.

An applicant will also need to request an IRS Tax Return Transcript if: (a) The applicant was unable or chose not to use the IRS Data Retrieval Process – either on the initial FAFSA or through the FOTW correction process; or (b) Information included on the FAFSA using the IRS Data Retrieval Process was changed after being imported from the IRS.

IRS Tax Return Transcript

A 2017 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by MAIL** -- Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- **Get Transcript Online** -- Go to www.IRS.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript." To use the Get Transcript Online tool the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- **Automated Telephone Request** -- 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- **Paper Request Form** -- IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

If the student and spouse are reported on the FAFSA and filed 2017 IRS income tax returns separately, the IRS DRT cannot be used and the **2017 IRS Tax Return Transcript(s)** must be provided for each.

If the student or spouse filed an amended return, contact your financial aid counselor for special instructions.