

# Financial Aid Verification Update

## 2012-13

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**The Federal Department of Education has instituted some changes to the verification process for the 2012-13 Academic Year.**

### WHAT THIS MEANS

- You can no longer submit a signed copy of IRS tax forms as a way to confirm the income reported on the FAFSA. Now the FAFSA gives you the option to have your tax information retrieved directly through the IRS Data Retrieval Tool. Choosing this option will shorten the time to be evaluated for aid eligibility and could lessen the amount of requested documents.
- If you do not use this option, or use this option but then change any of the IRS information, you may be selected for verification. In this case, you must turn in an IRS tax transcript, along with a verification worksheet. Tax transcripts would be required for anyone who reported income tax information on the FAFSA, including you and your spouse and/or parent(s).

### USING THE IRS DATA RETRIEVAL TOOL

You can use this tool when you initially complete your FAFSA or when making a correction to the FAFSA. If the retrieved data is not changed, then an IRS tax transcript will not be required. Filers must wait 2-3 weeks after filing electronically (or up to 8 weeks after filing by mail) in order to successfully use the IRS Data Retrieval Tool. For more information about this IRS Data Retrieval Tool, see our "IRS Data Retrieval" document.

### IF YOU WILL NOT FILE AN IRS TAX FORM

If you are selected for verification and you (or your parent or spouse) will not file taxes, please indicate this on the verification worksheet. If you worked, you must also request W-2 transcripts from the IRS. Copies of W-2 forms from all employers must be submitted to the One Stop Student Services with the verification worksheet.

### TAX FILERS WITH SPECIAL CIRCUMSTANCES

**The IRS Tax Retrieval may not be available for the student, spouse or student's parent in the following circumstances:**

- The parent has all zeroes for a SSN.
- The student or parent was not married in 2011 but is married at the time the FAFSA is filed, or is currently married to someone other than the individual included on the 2011 joint tax return. The current spouse's income must be reported on the FAFSA.
- A joint tax return was filed for 2011 and the student or the student's parents have filed the FAFSA with a marital status of separated, divorced or widowed.
- The student or parent is married but filed tax returns separately.
- The student or parent filed taxes as Head of Household.
- The student or parent has filed a Puerto Rican tax return or a foreign tax return. (Applicants filing a foreign tax return must submit a signed copy of their 2011 tax documents along with a verification worksheet to One Stop Student Services).
- The student or parent indicates they have not already filed a tax return or will not file a tax return.
- An amended tax return was filed. (Applicants filing an amended return will need to provide CWI with both an IRS Tax Return Transcript as well as the IRS Tax Account Transcript – also known as the Amended IRS Tax Transcript).

# Requesting an IRS Tax Transcript or W-2s

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You can order a tax return transcript online, by phone, or through the mail.

## Order Online:

Go to [www.irs.gov](http://www.irs.gov)

Click "Order a Tax Return or Account Transcript"

Click "Order a Transcript"

Enter the tax filer's information

Click "Continue"

In the Type of Transcript field, select "Return Transcript"

Orders are processed in approximately 5-10 business days

## Mail in Form 4506-T:

You may complete Form 4506-T, "Request for Transcript of Tax Return" and mail it to the address indicated on the form. You should receive your transcript within 10-15 days.

(Form 4506 is available at [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf)).

## Call:

1-800-908-9946 and request a transcript through the automated system.

When calling between 7 a.m. and 10 p.m., please select the following options:

Select the option for your preferred language

Enter your Social Security Number.

Enter the Numbers in your street address.

Select Option 2 for a tax return transcript.

Enter the year of the Return you are requesting.

Orders are processed in approximately 5-10 business days.

## To Order a W-2 Transcript:

Call 1-800-829-1040

Listen to all options and you will be transferred to speak to an IRS Representative.

You must call during business hours to speak with an IRS Representative.

Your W-2 transcript(s) will be mailed within 10 to 15 days.

## Other changes to requirements in the 2012-13 Academic Year:

### FOOD STAMP RECIPIENTS

On the FAFSA if Question 75 confirms that Food Stamp benefits, also known as Supplemental Nutrition Assistance Program (SNAP) were received in either 2010 or 2011 by any member of the student's family (as included on the FAFSA), recipients of Food Stamps must provide documentation that Food Stamps were received. If documentation is not provided, additional income and asset information may be requested. Students can indicate that benefits were received on the verification worksheet and must submit this form along with documentation to One Stop Student Services.

### CHILD SUPPORT PAID

Applicants who have been chosen for verification and who have indicated that **child support was paid** by the student, student's spouse, or student's parent(s) during 2011 must confirm the amounts of child support paid, to whom the payments were made, and the names and address of the children receiving the child support. This information can be completed on the verification form and submitted to One Stop Student Services.

## NEED HELP?

Contact  
**One Stop Student Services**  
for questions about  
financial aid or any  
other student services  
issue.

208.562.3000  
[onestop@cwidaho.cc](mailto:onestop@cwidaho.cc)



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