Your Student Aid Report (SAR) indicates that you have been selected for verification of federal financial aid eligibility. You must submit a verification worksheet and provide the required Income Verification or Verification of Non-filing documentation to our office.

Part 1 - Verification Worksheet

Complete the 2019-20 Verification Worksheet.

Part 2 – IRS Income Verification

Tax filers selected for verification for the 2019-20 year can provide IRS Income Verification by using the IRS Data Retrieval Tool (IRS DRT) to transfer income information from the IRS to the *FAFSA on the Web* at FAFSA.gov, by requesting Tax Return Transcript(s) from the IRS, or by providing signed copies of their 2017 federal tax return that was filed with the IRS. Note: The best way to verify income is by using the IRS DRT. In most cases, no further documentation is needed to verify 2017 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed. Tax Return Transcripts may take additional time to receive. Wesleyan strongly recommends using the IRS DRT option when possible.

Option 1 - IRS Data Retrieval Tool (IRS DRT)

Using the IRS Data Retrieval Tool (IRS DRT) to transfer tax return information from the IRS to the *FAFSA on the Web* is recommended. Some individuals may not be eligible to use the IRS DRT based on type of filing or filing status. *If you are ineligible or choose not to use the IRS DRT, you may provide an IRS Tax Return Transcript to verify income information.*

- **To use IRS DRT** login at FAFSA.gov to submit corrections to your 2019-20 FAFSA using the *Link to IRS* button.

Option 2 - IRS Tax Transcripts

Tax transcripts are available from the IRS free of charge. You will need to provide identifying information including: tax filing status, Social Security Number and date of birth of the first person listed on the income tax return, and the mailing address from the latest tax return filed. *Be sure to choose **Tax Return Transcript** when selecting the transcript type*. More information can be found at IRS.gov and clicking "Get Your Tax Record." *Married tax filers with separate returns must provide transcripts for both spouses.*

A 2017 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to IRS.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and *NOT* the "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 IRS.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and *NOT* the "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.

Option 3 – Signed Copy of 2017 Federal Tax Return

You may also submit a copy of the 2017 IRS form 1040, 1040A, or 1040EZ that was filed with the IRS and was signed by the taxpayer, or if completed by a paid preparer, includes the tax preparer's Social Security Number (SSN), Employer Identification Number (EIN), or Preparer Tax Identification Number (PTIN) and has been signed, stamped, typed, or printed with the name and address of the preparer of the return. Copies must be legible and contain all relevant information as filed with the IRS.

Verification of Non-filing (VNF)

Parents of dependent students and independent students and/or their spouses who did not file and were not required to file a 2017 income tax return with the IRS must provide a Verification of Non-Filing Letter from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed. *Non-filers must also complete the applicable sections of the Verification Worksheet, listing all sources and amounts of 2017 employment income (even if the employer did not issue an IRS W-2 form), and provide copies of all 2017 IRS W-2 forms or equivalent documents issued by each employer.*

- **To request an IRS Verification of Non-Filing Letter:** Follow the instructions provided above for IRS Tax Transcripts, choosing *Verification of Non-Filing Letter* when selecting the transcript type.
- **If unable to obtain the VNF from the IRS:** Complete the applicable sections of the *Verification Worksheet*.

<u>Verification of Income Information for Individuals with Unusual Circumstances</u>

Amended IRS Income Tax Returns
An individual who filed an amended IRS income tax return for tax year 2017 must provide:

- A signed copy of the 2017 IRS Form 1040X "Amended U.S. Individual Tax Return" that was filed with the IRS, **<u>and</u>** one of the following:
- IRS DRT information on the *FAFSA on the Web* with all tax information from the *original tax return*; **<u>or</u>**
- A 2017 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **<u>or</u>**
- A signed copy of the 2017 tax return containing the original information filed with the IRS.

IRS Tax Extension Granted (Form 4868)
An individual who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2017, must provide:

- A copy of IRS Form 4868, ''Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,'' that was filed with the IRS for tax year 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2017;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed, see above) from the IRS or other relevant tax authority dated on or after October 1, 2018;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2017 **<u>and</u>**,
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2017.

Victims of IRS Tax-Related Identity Theft
An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; **<u>and</u>**
- A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico or the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. Please note: the tax filer may be required to provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

<u>Submit the Verification Worksheet and applicable income verification documents to:</u>

Wesleyan University
Financial Aid Office
237 High Street
Middletown, CT 06459
finad@wesleyan.edu
fax: 860.685.2801

<u>NOTE:</u> IRS Income Verification does not replace Wesleyan's federal tax return (1040, 1040A, 1040EZ) requirement(s). Additional documentation may be required upon review.