

2018-2019 Independent Verification General Instruction

Required by U.S Department of Education

Verification is the process used to confirm that the data reported on your FAFSA is accurate. This includes household and income information. If you are selected for verification, do not assume you are accused of doing anything wrong, the Department of Education selects most students at random for the verification process. **This form along with other requested documentation is used to verify income and household information to complete the verification process. You can see a list of your outstanding requirements on WINGS Express, or for new students not yet enrolled in classes, your Applicant Portal.**

The process to verify your FAFSA information will begin after the Office of Financial Aid receives all of the requested verification forms and documentation. You can check the status of the documents on WINGS Express. If the Office of Financial Aid needs additional documentation or has clarifying questions, the status of your requirement will be set to follow-up and a Financial Aid representative may contact you via your WSU e-mail account or by calling the phone number listed on the Verification Worksheet. For information regarding processing timeframes and submission deadlines, please visit <https://www.wright.edu/raider-connect/financial-aid/important-dates>.

When verifying your FAFSA information, if there are differences between your FAFSA and the required documentation you've provided, your FAFSA information will be corrected.

Providing Documentation of Your 2016 Federal Taxes or Non-filing Status.

You may be asked to turn in documentation of your, and if married spouse's, 2016 Federal Taxes or documentation that you did not file a 2016 Federal Tax return with the IRS. Below are instructions on how to request documentation from the IRS based on your filing status.

Tax Filer

If you (and if married your spouse) filed a 2016 federal tax return, you must either use the DRT or request an IRS Tax Return Transcript.

Using the Retrieval Tool (DRT)

Go to [FAFSA.gov](https://fafsa.gov). Log into the FAFSA and select "Make FAFSA corrections". Navigate to the student financial section. When using the DRT, do not modify income before transferring information to the FAFSA. Wright State University will receive confirmation from the department of education within 5 business days that the DRT tool was utilized.

Note: If the tax filer uses the FAFSA DRT and filed an amended tax return (1040X) they will need to request an IRS Tax Return Transcript.

Request an IRS Tax Return Transcript

Get Transcript by MAIL – Go to <https://www.irs.gov/individuals/get-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 <https://www.irs.gov/individuals/get-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. On line 6 be sure to enter the tax form number (ex. 1040) and check box 6a. On line 9, enter the year of period requested (ex. 12/31/2016). The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Non-Tax Filer

Students (and if married spouse) who did not file and were not required to file a 2016 federal tax return must provide documentation that they did not file a 2016 federal tax return with the IRS. To document the status of non-filing, students must request an IRS Tax Return Transcript dated on or after October 1, 2017. The IRS will return to you a tax return transcript that states there is no record of return on file.

Request an IRS Tax Return Transcript for individuals who have never filed a tax return with the IRS.

Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. Complete the form and mail it to the IRS using the instructions on page 2. For a non-filing letter be sure to check box 7, and on line 9 enter the year or period requested (ex. 12/31/2016). The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Additional methods to request an IRS Tax Return Transcript for individuals who have filed a tax return with the IRS in previous years.

Get Transcript ONLINE – Go to <https://www.irs.gov/individuals/get-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.

REMEMBER to Check WINGS Express!

To check the status of your financial aid or view a list of your outstanding financial aid requirements, visit WINGS Express. For more information on how to navigate WINGS Express, visit <https://www.wright.edu/information-technology/services/student-support>. For assistance with campus user names and password resets call the Help Desk at (937) 775-4827 or 1-888-775-4827.

New students who are not yet enrolled in classes view their next steps in the Admissions Portal at wright.edu/apply.

For more information about providing 2016 tax documentation, visit <http://www.wright.edu/raiderconnect/financial-aid/fafsa-verification-process#tax>.

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Student Name:

UID:

D. Student and Spouse (if married) Information

Complete the Federal Work Study Earnings section and either the 2016 Tax Filer or the 2016 Non-Tax Filer section based on your tax filing status.

Student and Spouse (if married) 2016 Federal Work-Study Earnings

1. Did you and/or your spouse earn any Federal Work-Study in 2016? No. Yes. If yes, answer the questions below.

Amount of Federal Work-Study you (the student) earned in 2016: \$ _____

Enter name of the school where Work-Study was earned: _____

Student and Spouse (if married) 2016 TAX FILERS ONLY

Complete this section if you and/or your spouse filed a 2016 Federal Tax Return. If you and/or your spouse did not file and were not required to file taxes for 2016, complete the Non-Tax Filers Only section.

1. You and/or your spouse must use the FAFSA DRT Tool or submit a copy of your 2016 Federal Tax Return Transcript.

Check here if you used the FAFSA IRS Data Retrieval Tool or are submitting a copy of your (or your spouse's) 2016 Federal Tax Return(s) Transcript with this form.

Check here if you and/or your spouse will use the FAFSA IRS Data Retrieval Tool or submit a copy of your (or your spouse's) 2016 Federal Tax Return Transcript at a later date. For more information about providing 2016 tax information, view the first page of general instructions.

Tax filers who have filed an amended tax return (1040X) or filed a non-IRS tax return (e.g., a foreign tax return) you may be required to submit additional documentation. For more information about providing 2016 tax information, visit

<http://www.wright.edu/raiderconnect/financial-aid/fafsa-verification-process#tax> .

2. You and/or your spouse had a transfer of holdings of one IRA to another (rollover) in 2016?

No. Yes. If yes, enter the rollover amount in the box.

Rollover may be all or part of 1040 lines 15a minus 15b (or 1040A lines 11a minus 11b).

\$ _____

3. You and/or your spouse had a transfer of holdings of one pension or annuity to another (rollover) in 2016?

No. Yes. If yes, enter the rollover amount in the box.

Rollover may be all or part of 1040 lines 16a minus 16b (or 1040A lines 12a minus 12b).

\$ _____

Student and Spouse (if married) 2016 NON-TAX FILERS ONLY

Complete this section if you and/or your spouse will not file and are not required to file a 2016 income tax return with the IRS.

1. You and/or your spouse must submit a Tax Return Transcript dated on or after October 1, 2017 that indicates a 2016 IRS income tax return was not filed with the IRS or other relevant tax authority. This is to document your non-filing status with IRS or other relevant tax authority.

Check here if you and/or your spouse are submitting a copy of the 2016 Federal Tax Return(s) Transcript, which documents the status of non-filing, with this worksheet.

Check here if you and/or your spouse will submit a copy of the 2016 Federal Tax Return(s) Transcript, which documents the status of non-filing, at a later date. For more information about providing documentation of non-filing, view the first page of general instructions.

2. You and/or your spouse must submit documentation of your earnings from employment.

Check here if you and/or your spouse was not employed and had no income earned from work in 2016.

Check here if you and/or your spouse was employed in 2016. Complete the table below using the provided instructions.

Enter you or your spouse's name, employer(s), and the amount earned in 2016. NOTE: Attach a copy of the W-2 for each employer. If a copy is not available, attach a statement explaining why a W-2 cannot be obtained. If you earned business or miscellaneous income, a 1099 or business schedules may be requested.

Student/Spouse's Name	Employer's Name	2016 Amount Earned	W-2 Attached?
		\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
		\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
		\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No