2023-2024 Independent Verification Checklist

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Verification is a process required by the Dept. of Education to confirm the information you provided on the FAFSA. Your award letter will indicate all documents needed to complete your financial aid file. You may also view your list of requirements online via BannerWeb, and will receive weekly email notifications of documents which are missing or incomplete. Follow the checklists below to see which documents you may need to submit—be sure to include your student ID number on all documents submitted.

If you/your spouse filed a federal tax return in 2021:

1. Submit the verification worksheet(s) indicated in your award letter or notification emails
2. Transfer your tax return data into your FAFSA using the Data Retrieval Process (DRT) at *www.studentaid.gov*

    - Log back into your FAFSA at *www.studentaid.gov* using your FSA ID.
    - Choose the 2023-2024 FAFSA, and click on *Make FAFSA Corrections.*
    - Click on *Financial Information* and follow the prompts to link to the IRS. Check the box to transfer the information and click on *Transfer Now*, or the information will not be imported to your FAFSA.
    - Be sure to submit the updates to your FAFSA before logging off.

3. If you are unable to or choose not to use the DRT process, submit a SIGNED copy of your Federal tax return.

4. If you are unable to locate a copy of your tax return, you may request a *Tax Return Transcript* from the IRS:

     Online**:**

    - Go to *http://www.irs.gov*.

        Click *Get Transcript by Mail,* and follow the prompts using the primary tax-payer's information from the tax return.

    - Download IRS Form 4506T-EZ at *http://www.uiw.edu/finaid/forms.html,* or at *www.irs.gov*
    - Fill in items 1-4, and check Box 7.
    - Enter "12/31/2021" in Box 9, sign and date the form.
    - Enter your student ID in the "Customer File Number" box
    - Mail or fax the completed form to the address/number indicated in the instruction sheets.
        * ***Do not*** *list the Office of Financial Assistance address as a 3rd party to have the transcript sent directly to us, as we may be unable to match up your information, which will delay your aid.*

3. If you/your spouse worked in 2021, you must also submit copies of all sources of income (W-2s, 1099s, etc.)