

2023-2024 Verification Instructions (Independent student)

Your Free Application for Federal Student Aid (FAFSA) was selected for review in a process called “**Verification.**” Verification is mandated by the U.S. Department of Education and requires schools to gather additional documentation to check the accuracy of information submitted on the FAFSA.

To facilitate this process, you are required to complete and submit a signed **2023-2024 Independent Student Verification Worksheet**. Other forms of documentation may also be requested by the Financial Aid Office at RHSHS.

Acceptable documentation of tax information may include:

- **An updated FAFSA using the IRS Data Retrieval Tool (IRS DRT) or**
- **A 2021 IRS Tax Return Transcript or**
- **A signed copy of the 2021 Federal Income Tax return with Schedules 1, 2, 3 (if applicable) and all copies of 2021 W-2 forms issued.**

If you did not use the **IRS Data Retrieval Tool** when completing the FAFSA, **we encourage you to go back to the studentaid.gov website** and update your tax information via the IRS Data Retrieval Tool option. In most cases, no further documentation is needed to verify 2021 income information that was transferred into the student’s FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Note: If the student and spouse filed separate 2021 IRS income tax returns, the IRS DRT cannot be used. The 2021 IRS Tax Return Transcript OR a signed copy of the 2021 Federal Income Tax return with Schedules 1, 2, 3 (if applicable) and all copies of 2021 W-2 forms must be provided for both the student and spouse.

A 2021 Tax Return Transcript from the IRS may be obtained through:

- **Get Tax Transcript by Mail** - Go to www.irs.gov, click “**Get Your Tax Record**”. Click “**Get Transcript by Mail.**” Make sure to request the “**IRS 2021 Tax Return Transcript**” and **NOT** the “Account Transcript”. Complete all requested information such as SSN, birth date and mailing address from your latest tax return. The transcript is generally received within 10 business days from the IRS’s receipt of the online request.
- **Get Tax Transcript Online** - Go to www.irs.gov, click “**Get Your Tax Record**”. Click “**Get Transcript Online.**” Make sure to request the “**IRS 2021 Tax 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** - Call the IRS at 1-800-908-9946. The transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.
- **Paper Request Form** - Complete 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.

Verification of 2021 Income Information for Individuals with Unusual Circumstances

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2021 must provide a **signed copy of the 2021 IRS Form 1040X**, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

1. IRS DRT information on an ISIR record with all tax information from the original tax return; or
2. A 2021 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 the income and tax information required to be verified; or
3. A signed copy of the 2021 IRS Form 1040 with Schedules 1, 2, 3 (if applicable) and all copies of 2021 W-2 forms that were filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

1. A Tax Return Database View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2021 income tax return and applicable schedules the individual filed with the IRS; **AND**
2. 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.

Individuals Who Filed Non-IRS Income Tax Returns

1. A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2021 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2021, must provide:

1. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2021.
2. Verification of Non-Filing (VNF) Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022, or a signed statement certifying that the individual attempted to obtain the VNF from the IRS and was unable to obtain the required documentation.
3. A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2021 and,
4. 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 2021.

NOTE: An individual granted a filing extension beyond the automatic six-month extension may be required to submit tax information using the IRS Data Retrieval Tool, by obtaining a transcript from the IRS, or by submitting a copy of the income tax return and the applicable schedules that were filed with the IRS that lists 2021 tax account information.

Financial Aid eligibility will not be determined for those selected for verification until all documents required are submitted and the verification process is completed. If financial aid has already been disbursed and the student is subsequently selected for verification, further disbursements are stopped until the verification process is completed. Failure to submit the required documentation (or submit it in a timely manner) to the RHSHS Financial Aid Office may cancel the eligibility for federal and state awards.