

COMPLETING VERIFICATION REQUIREMENTS FOR 2013-14

Approximately one out of every three FAFSA applications is randomly selected for the verification process by the Central Processing System. Students selected must submit information to verify key components reported on the FAFSA. Students will receive a missing information e-mail if selected. **Federal aid cannot be awarded until the verification process has been completed.**

Effective with the 2013-14 FAFSA, students selected for verification will be placed in one of the five verification tracking groups as part of the Department of Education's long-term goal to achieve a customized approach to verification. You can review the five verification tracking groups and requirements in section C.

A. Review Missing Requirements and Instructions

- 1) Log into Pipeline and click on the RaiderNet tab.
- 2) Click on the “**Financial Aid**” tab and choose the “**Eligibility**” option
- 3) Choose “**2013-14 Financial Aid Year**” in the drop down menu of “**Select Aid Year**” and **submit**
- 4) The “**Student Requirements**” will display and include all “**Unsatisfied Requirements**” and “**Instructions**”. Click on a required form to automatically link to the correct form. The instructions tab will detail procedure to complete a non-form requirement.

Click the “**Requirement Messages**” tab to view all requirement messages together.

B. Verify Income Reported on the FAFSA

Students selected for the Standard Verification (VI) and Aggregate Verification (V5) groups will be required to verify the 2012 income reported on the FAFSA for student/spouse and parents (if dependent). Tax filers must verify their income by utilizing the **IRS Data Retrieval Tool** (Option 1) or by submitting a copy of their **Tax Return Transcript** (Option 2) for 2012 obtained from the IRS. Instructions included below. **Note:** If you owe the IRS, you may not be able to utilize either of these options until your tax obligation has been paid in full.

[Option 1: The IRS Data Retrieval Tool](#)

We strongly encourage students/parents to use option 1. It is the easiest and fastest option to access IRS tax return information and transfer the data directly into the FAFSA on the original application as well as the corrections on the web process. This will satisfy the request for tax information, but you must still submit the Verification Worksheet.

- Electronically filed federal tax return information will be available online from the IRS site in 2-3 weeks after the return has been filed.
- Data from paper federal tax returns will be available in 8-11 weeks.

You <u>can</u> use Option 1 if:	You <u>cannot</u> use Option 1 if:
<ul style="list-style-type: none">• You have filed your federal tax return	<ul style="list-style-type: none">• Marital status changed after 12/31/12
<ul style="list-style-type: none">• You have a valid social security number	<ul style="list-style-type: none">• Married, but filed separate tax returns or as Head of Household
<ul style="list-style-type: none">• You have a FAFSA PIN number	<ul style="list-style-type: none">• Filed an amended return. Submit:<ol style="list-style-type: none">1. Signed copy of all pages of original tax return and W-2s <u>or</u> Tax Return Transcript.2. Signed copy of IRS 1040X.

How to Use the IRS Data Retrieval Tool

1. Log into the FAFSA using your name, Social Security Number and date of birth.
2. Select "Make FAFSA Corrections".
3. Enter your PIN and Password.
4. Click on the "Financial Information" tab. If you are a dependent student, the "Parent Financial Information" screen will display. Select "already completed" from the drop down box. If you are an independent student, the "Student Financial Information" screen will display and you will select "already completed".
5. Correct tax filing status on the FAFSA from "will file" return to "already completed" return. Answer questions that determine if the IRS Data Retrieval Tool can be used. If eligible to use the IRS Data Retrieval, enter your PIN and link to IRS. You will be notified that you are leaving FAFSA on the web. Click "OK" to continue.
6. Enter requested information exactly as it appears on the filed tax return. Click "Submit". If the IRS is able to validate your identification, the Federal Income Tax Information will display. Click "Transfer Now" and then return to the FAFSA using the link provided. If you are a dependent student and filed a tax return, select "already completed" and repeat the process to use the IRS Data Retrieval.
7. Once completed, continue to the "Sign & Submit" tab and submit your corrections.
8. Corrected FAFSA results will be sent to your school. By successfully using the IRS Data Retrieval Tool, you will only have to submit the appropriate Verification Worksheet.

Do not change FAFSA information imported by using the IRS Data Retrieval Tool.

[Option 2: Tax Return Transcript](#)

If you cannot or chose not to use the IRS Data Retrieval Tool or have changed your IRS data on the FAFSA since using the IRS Data Retrieval Tool, you must:

- Submit a signed copy of your Tax Return Transcript to the Financial Aid Office. The Tax Return Transcript must be obtained directly from the IRS. **[Include the student's M# on each page.](#)**

How to Obtain a Tax Return Transcript

On-line	Telephone Request	Paper Request
<ul style="list-style-type: none"> • Request a Tax Return Transcript <p>Go to www.irs.gov. Search Tax Return Transcript.</p> <ul style="list-style-type: none"> • Select "Order a Transcript" from the search results • Select "Order a Transcript" under # 3 • Enter requested personal information and continue • Choose "Return Transcript" as the type of transcript, 2012 as the tax year and continue. 	<ul style="list-style-type: none"> • Call the IRS at 1-800-908-9946. Enter requested personal information • Select "Option 2" to request an IRS Tax Return Transcript and then enter "2012" 	<p>Only use this option, if you are unable to use either of the other two options. This is the slowest option and can take up to 30 days.</p> <ul style="list-style-type: none"> • Print IRS Form 4506T-EZ (http://www.irs.gov/pub/irs-pdf/f4506tez.pdf) • Mail or fax the completed form to the appropriate address listed on page 2 of the form

NOTE REGARDING NON-FILERS: Students and/or Parents who **have not and are not required to file a tax return** **MUST** mark this on the **Verification Worksheet**. All income earned in 2012 must be reported on the FAFSA, even if a tax return is not required. Fully complete this information on the Verification Worksheet. Include the name of each employer, the amount earned for the calendar year of 2012, AND submit a copy of each W-2. If a W-2 is not available, submit a signed statement (preferably on letterhead) from the employer verifying the 2012 earnings and explanation of the absence of the W-2.

C. Five Verification Tracking Groups:

V1. Standard Verification:

Dependent Student (as defined by the FAFSA)	Independent Student (as defined by the FAFSA)
Submit the Verification Worksheet for Dependent Students: http://www.mtsu.edu/financialaid/forms/1314Verwrkshtdep.pdf	Submit the Verification Worksheet for Independent Students http://www.mtsu.edu/financialaid/forms/1314Verwrkshtind.pdf
<ul style="list-style-type: none"> Number in the Family/Number in College SNAP Benefits (formerly – Food Stamps) Child Support Paid 	<ul style="list-style-type: none"> Number in the Family/Number in College SNAP Benefits (formerly – Food Stamps) Child Support Paid
Tax Filers: Utilize IRS Data Retrieval Tool or submit IRS Tax Return Transcript for student and/or parent	Tax Filers: Utilize IRS Data Retrieval Tool or submit IRS Tax Return Transcript for student/spouse
Not required to file a tax return: Submit a copy of all W-2s of student and/or parent to verify all earned income in 2012. If a W-2 is not available, submit a signed statement (preferably on letterhead) from the employer verifying the 2012 earnings and explanation of the absence of the W-2.	Not required to file a tax return: Copy of all W-2s of student/spouse to verify all earned income in 2012. If a W-2 is not available, submit a signed statement (preferably on letterhead) from the employer verifying the 2012 earnings and explanation of the absence of the W-2.

V2. **SNAP Verification:** <http://www.mtsu.edu/financialaid/forms/1314VerSNAP.pdf>

V3. **Child Support Paid Verification:**
<http://www.mtsu.edu/financialaid/forms/1314VerChildSupport.pdf>

V4. **Custom Verification:** Submit all four of the following forms:

- **2013-14 Verification of High School Completion Status**
<http://www.mtsu.edu/financialaid/forms/1314VerHSCompletion.pdf>
- **2013-14 Verification of Identity and Statement of Educational Purpose**
<http://www.mtsu.edu/financialaid/forms/1314VerIDandStatementofPurpose.pdf>
- **2013-14 Verification of SNAP Benefits** (link provided above in V2)
- **2013-14 Verification of Child Support Paid** (link provided above in V3)

V5. **Aggregate Verification:**

Dependent Student (as defined by the FAFSA)	Independent Student (as defined by the FAFSA)
Submit the Verification Worksheet for Dependent Students: http://www.mtsu.edu/financialaid/forms/1314Verwrkshtdep.pdf Used to verify the following:	Submit the Verification Worksheet for Independent Students: http://www.mtsu.edu/financialaid/forms/1314Verwrkshtind.pdf Used to verify the following:
<ul style="list-style-type: none"> Number in the Family/Number in College SNAP Benefits (formerly – Food Stamps) Child Support Paid 	<ul style="list-style-type: none"> Number in the Family/Number in College SNAP Benefits (formerly – Food Stamps) Child Support Paid
Tax Filers: Utilize IRS Data Retrieval Tool or submit IRS Tax Return Transcript for student and/or parent	Tax Filers: Utilize IRS Data Retrieval Tool or submit IRS Tax Return Transcript for student/spouse
Not required to file a tax return: Copy of all W-2s of student and/or parent to verify all earned income.	Not required to file a tax return: Copy of all W-2s of student/spouse to verify all earned income.
Submit the 2013-14 Verification of High School Completion Status form with required documentation.	Submit the 2013-14 Verification of High School Completion Status form with required documentation.
Submit the 2013-14 Verification of Identity and Statement of Educational Purpose form. This form must be signed in the Financial Aid Office or notarized and submitted with a copy of the same document used by the Notary to verify your identity.	Submit the 2013-14 Verification of Identity and Statement of Educational Purpose form. This form must be signed in the Financial Aid Office or notarized and submitted with a copy of the same document used by the Notary to verify your identity.