



2022-2023 Verification Policy - Independent Student

Group 1 - Standard Verification Group

- ❖ **Purpose:** This policy sheet is designed to help you understand the verification process. Your application was selected for review in a process called Verification. In this process, the law states schools have the right to ask you for this information before awarding Federal aid. Complete the attached verification form and submit it to the Student Financial Services Office by mail, email or fax as soon as possible to avoid delays in financial aid disbursements. Follow the directed steps in this packet to ensure Rochester University will be comparing information from your FAFSA application to official IRS data of your spouse and your Federal tax information. If there are differences between your FAFSA information and your IRS financial data, your Financial Service Advisor must make corrections electronically.
 - ❖ **Deadline:** You must complete the verification worksheet and submit the supporting documentation by the end of the first semester you attend for the academic year in which you have been selected for verification. **You are not eligible to receive any Federal, Title IV financial aid disbursements until you have completed this process.** Verifications submitted after the first attended semester will not be evaluated and therefore you will not receive any campus based aid or federal loans or aid for that year. However, if you have extenuating circumstances on why you were not able to meet the deadline, you may file a written appeal to the Director of Student Financial Services for consideration.
 - ❖ **Corrections:** Based on the items submitted, the Student Financial Services office will enter the data into the Department of Education software and once information is recalculated, our office will make any applicable changes. Should additional information be needed, you will be contacted by email and/or mail.
 - ❖ **Notification:** Within one week of completing the verification, the Student Financial Service Office will notify you by email if the verification resulted in a different Expected Family Contribution (EFC).
 - ❖ Please contact your Financial Service Advisor with any questions; we are here to help you.
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IRS DATA RETRIEVAL DIRECTIONS:

(If you have already completed the IRS Data Retrieval when completing your FAFSA, you may disregard these directions. Please move on to completing the "Student Information" section and the remaining sections of the worksheet).

Go to www.fafsa.gov and after signing in using "Log In", click "Make Corrections to FAFSA". Go to "Financial Information". Enter PIN if not already done so at the beginning of your session. At that point, your FAFSA will be saved and you will be transferred to the IRS Web site:

1. On the IRS Web site, enter the requested information.
2. Once the IRS has validated your identification, your IRS tax information will display. At this point you will transfer your information from the IRS
3. Once you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."
4. It is very important not to change data amounts transferred from the IRS. Your FAFSA will be coded if changes were made and you will be required to go back in and re-transfer the data.

The instructions and certifications below apply to the student. Complete this section if the student will not file and are not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

To request the confirmation of nonfiling letter online, go to www.irs.gov and click "Get Transcript Online". Enter the requested information and click "continue". Click "Verification of Non-filing Letter" and in the Tax Year field, select "2020". If successfully validated, you will be able to view your IRS Verification of Non-filing letter. Sign and submit the letter to the office of Student Financial Services. If you are unable to retrieve your letter online, please complete from 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).

E. Spouse Tax Forms and Income Information

1. Please only check one box

- I am not required to file my taxes but have attached my W-2's and all other documents that apply to me. (Please list each employer and the amount received for 2020 below.) **Please also go to Section F and complete the required fields as a nontax filer for 2020.**
- I did not work in 2020 and have no income to report. **Please also go to Section F and complete the required fields as a nontax filer for 2020.**
- I sent my taxes in via the IRS Data Retrieval
- I sent my taxes to the Student Financial Services Office

2. If you are not required to file taxes, please send copies of W-2's to the Student Financial Services Office.

Sources	2020 Amount

F. Spouse NonTax Filer Requirements

The instructions and certifications below apply to the student's spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- Check here if confirmation of nonfiling is provided.
- Check here if confirmation of nonfiling will be provided later.

To request the confirmation of nonfiling letter online, go to www.irs.gov and click "Get Transcript Online". Enter the requested information and click "continue". Click "Verification of Non-filing Letter" and in the Tax Year field, select "2020". If successfully validated, you will be able to view your IRS Verification of Non-filing letter. Sign and submit the letter to the office of Student Financial Services. If you are unable to retrieve your letter online, please complete from 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>).

G. Sign this Worksheet (must be printed and signed, we are not able to accept typed signatures)

By signing this worksheet, we certify that all the information reported on it is complete and correct.

Student Signature (Required) _____ Date _____

Spouse Signature (Preferred, not required) _____ Date _____

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Fax: 248-218-2065

Email: sfs@rochesteru.edu