

2019-20 FAFSA Verification Instructions – Parent

Contact: IVFINDEP

**You will not be able to receive a Financial Aid award letter until this issue is resolved.
THIS IS AN URGENT MATTER.**

FAFSA has selected your child’s application for “Verification”. “Verification” is a quality control process in which FAFSA requires us to collect additional documents and information in order to confirm the accuracy of the data reported on the student’s FAFSA. This affects about thirty percent (30%) of all FAFSAs. **It is a routine process but processing of your student’s application for Financial Aid cannot continue until this is completed.**

Instructions:

1) Verification Worksheet: You will be required to complete and submit a Verification Worksheet. The appropriate Verification Worksheet required for you has been presented to you on your MyKWU Student Portal under >Student Financial Planning > “Financial Aid Document Tracking”> 2019-20. Print the pdf document, complete and sign it. A parent (whose information is on the 2019-20 FAFSA) must sign this worksheet. Scan/Email, Fax, take a picture and email it to us. Time is of the essence!

2) 2017 Federal Income Tax Return Information: (Form 1040, 1040A or 1040EZ):

- We can no longer accept signed copies of the IRS Tax forms. The preferred method of providing income tax data is via the IRS Data Retrieval Tool within FAFSA.

*For a Step-by-Step instruction on how to use the IRS Data Retrieval Tool:
go to www.kwu.edu > Current Students> Student Financial Planning >
Forms > 2019-20 > Step-by-Step IRS DRT.*

- **Question: What if you are unable to use the IRS Data Retrieval Tool within FAFSA?**
Answer: You can provide a copy of your (and your spouse’s-if you filed separate returns) **2017 IRS Tax RETURN Transcripts** (if you are married now, even if you were not married in 2017). You can obtain the Tax Return Transcript at www.irs.gov> Get Transcript.
- **If you are unable to download the Tax Transcript**, you may be able to have the IRS mail a copy of the IRS Tax Transcript, but they will mail it to the address on the Tax return...so if you have moved, that may not be successful for you. See the instructions under Q&A at the end of this instruction sheet on “Changing Address” with the IRS.

- Question: Whose income tax return transcript will we need?

Parent Marital Status: For:	Parent whose information appears on FAFSA	Both parents information
Parents who are married and living together,		Both parents
Parents who were never married, but are the biological parents and are living together		Both parents
Parents who are divorced and living apart, and not yet remarried,	FAFSA parent only	
Parent who is divorced from the student’s biological parent and remarried		Custodial parent and step parent information

5. If you have not yet filed your 2017 Federal Income Tax Return, **AND** you have requested an extension to file your returns from the IRS, there is another method by which you can complete Verification.
- Go to the www.KWU.edu website>Current Students>Student Financial Planning>Forms.
 - See the pdf titled “2019-20 Tax Extension Verification form”.
 - Download this form and follow the instructions thereon.
 - Submit the required documents to the KWU Student Financial Planning Office.
 - WARNING: You will need to attach a copy of the (*un-expired*) Tax Deadline Extension granted by the IRS.

How to request an IRS Tax Transcript	
<p>1</p> <p>On-Line Request</p> <p>Download a copy of the 2017 IRS Tax RETURN Transcript from the IRS Website.</p> <p>OR</p>	<p>Go to www.IRS.gov.</p> <ul style="list-style-type: none"> • On the main Home Page, Click on “Get My Tax Transcript.” • Follow the instructions therein to download the 2017 IRS Tax RETURN Transcript. • One of the taxpayers on the Return must sign the Tax Transcript. • Send all of the pages to us. (HINT: Sometimes these are dual sided. We will need both sides.) <ul style="list-style-type: none"> • Scan and email to finaid@kwu.edu, or • Fax to 785-404-1485, or • Mail to the above address.
<p>2</p> <p>On-Line Request</p> <p>Request a copy of the 2017 IRS Tax RETURN Transcript to be mailed.</p> <p>OR</p>	<p>Go to www.IRS.gov.</p> <ul style="list-style-type: none"> • On the main Home Page, Click on “Get My Tax Transcript.” • Follow the instructions therein to have your 2017 IRS Tax RETURN Transcript mailed to you. <ul style="list-style-type: none"> ○ Note: This will take about 7 to 10 days and the IRS will mail the Transcript to the address on your tax return. If you have changed addresses since you filed your return, you will need to change your address prior to making this request. See the answer in the Q&A below. • One of the taxpayers on the Return must sign the Tax Transcript. • Send all of the pages to us. (HINT: Sometimes these are dual sided. We will need both sides.) <ul style="list-style-type: none"> • Scan and email to finaid@kwu.edu, or • Fax to 785-404-1485, or • Mail to the above address.
<p>Telephone Request</p> <p>Request a copy of the 2017 IRS Tax RETURN Transcript from the IRS by telephone</p> <p>OR</p>	<p>You may also use the IRS automated phone transcript service at 1-800-908-9946 to receive your transcript by mail. Please allow 5 to 10 calendar days for delivery.</p> <p>The IRS will mail the Tax Return Transcript to the address on the Tax Return</p>



2	<p>Visit a local office of the IRS and request a copy of your 2017 Tax Transcript.</p> <p>Have a taxpayer on the form sign it.</p> <p>Forward all pages to the Office of Student Financial Planning.</p>	<p>These are government offices. Their lobbies close promptly at 4:30 PM; be sure to arrive in plenty of time to complete your transaction with the IRS. Bring two forms of government identification. Only a taxpayer on the form will be allowed to make this request.</p> <table border="1" style="width: 100%;"> <thead> <tr> <th colspan="4" style="text-align: center;">IRS Offices Nearest to KWU</th> </tr> <tr> <th style="text-align: left;">City</th> <th style="text-align: left;">Street Address</th> <th style="text-align: left;">Days/Hours of Service</th> <th style="text-align: left;">Telephone*</th> </tr> </thead> <tbody> <tr> <td>Overland Park</td> <td>6717 Shawnee Mission Pkwy Overland Park, KS 66202</td> <td>Monday-Friday – 8:30 AM - 4:30 PM</td> <td>(816) 966-2840</td> </tr> <tr> <td>Topeka</td> <td>120 S.E. Sixth Ave. Topeka, KS 66603</td> <td>Monday-Friday – 8:30 AM - 4:30 PM</td> <td>(785) 235-3053</td> </tr> <tr> <td>Wichita</td> <td>555 N. Woodlawn Building 4 Wichita, KS 67208</td> <td>Monday-Friday – 8:30 AM - 4:30 PM</td> <td>(316) 352-7401</td> </tr> </tbody> </table> <p style="text-align: center;">To locate additional IRS Offices that provide the Tax Transcript service, go to http://www.irs.gov/uac/Contact-Your-Local-IRS-Office-1</p>	IRS Offices Nearest to KWU				City	Street Address	Days/Hours of Service	Telephone*	Overland Park	6717 Shawnee Mission Pkwy Overland Park, KS 66202	Monday-Friday – 8:30 AM - 4:30 PM	(816) 966-2840	Topeka	120 S.E. Sixth Ave. Topeka, KS 66603	Monday-Friday – 8:30 AM - 4:30 PM	(785) 235-3053	Wichita	555 N. Woodlawn Building 4 Wichita, KS 67208	Monday-Friday – 8:30 AM - 4:30 PM	(316) 352-7401
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Shortly after we receive the above documents, check your MyKWU Portal Account > Financial Aid Document Tracking>2019-20. If Verification is then completed, this alert will show “Completed”, and if all other documents have been received, you can expect an award letter in your KWU email and your MyKWU Portal account in the near future. If Verification is not completed, a new alert may appear and show “Expected” and you should contact the Office of Student Financial Planning for further instructions.

Q & A:

1) What if I have changed my address since I filed my return?”

Here is the IRS’ advice copied from the IRS Website:

What if my address has changed since I filed my last tax return and it doesn’t match IRS records when I try to use [Get Transcript by Mail](#) or the automated phone transcript service 1-800-908-9946?

Don’t use your old address. The transcript won’t get forwarded to you. You will need to file Form 8822, Change of Address, which you will download from the IRS Website. Generally, *it takes four to six weeks to process a change of address.*

In other words, **before you request the Transcript by phone or on the web,**

- Submit the Form 8822 to change your address with the IRS.
- After 4 weeks, access the Transcript Request to see if they have updated your address yet.
- Keep trying until the new address shows up.
- Then request the IRS Transcript via the Web or via phone. It will go to the correct (new) address.



- 2) What are the time frames for the availability of IRS Tax Return Transcripts?
a. See the chart on the next page.

Current Year Transcript Availability



Use the table below to determine the general timeframe when you can request a transcript for a current year Form 1040, 1040A, or 1040EZ return filed on or before the April due date. Availability varies based on the method you used to file your return and whether you have a refund or balance due.

The time frames for IRS Data Retrieval are the same as for IRS Tax Transcripts

When your original return shows a ...	and you filed <i>electronically</i> , then	and you filed on <i>paper</i> , then
refund amount or no balance due.	allow 2-3 weeks after return submission before you request a transcript.	allow 6-8 weeks after you mailed your return before you request a transcript.
balance due and you paid in full with your return,	allow 2-3 weeks after return submission before you request a transcript.	we process your return in June and you can request a transcript in mid to late June. Note: we process all payments upon receipt.
balance due and you paid in full after submitting the return,	allow 3-4 weeks after full payment before you request a transcript.	
balance due and you didn't pay in full,	we process your return in mid-May and you can request a transcript by late May.	

Free help with filing your Income Tax Return may be available from the IRS Volunteer Income Tax Assistance Program.

- ❖ Go to the IRS website (<http://www.irs.gov/Individuals/Free-Tax-Return-Preparation-for-You-by-Volunteers>) to search for a VITA program in your area.

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