



## **2021-2022 Verification Worksheet Information and Instructions**

### **What is Verification?**

Your 2021–2022 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The Department of Education requires that before awarding Federal Student Aid, we must ask you to confirm the information you (and your custodial parents if applicable) reported on your FAFSA application. Additional documents may be requested to resolve conflicting data.

To verify that we have the correct information:

- We will compare your FAFSA information with the information on the Verification Worksheet and with other required documents. If there are discrepancies, we will make corrections to your FAFSA.
- Attach all required documents, and submit the Verification Worksheet and required document(s) to the Financial Aid Office.

If you have questions about verification, contact the Financial Aid Office as soon as possible so your financial aid awards will not be delayed.

### **What happens after verification is completed?**

All submitted documents will be reviewed for accuracy. If necessary, corrections will be made to the FAFSA and students will be notified by the Central Processing System that changes have been made. Once the changes are processed, and funding is determined, the student will receive an award notice. Awards can be viewed and accepted through Student Online Services from your “My Herkimer” account.

### **Deadline for submitting documents**

All requested information must be received within 30 days. Failure to submit information in a timely manner may result in your application being filed as inactive with no further consideration and no federal aid will be processed.

**The Verification Worksheet must be signed, dated and returned to the Financial Aid Office. This may be mailed, faxed, or emailed to:**

**Herkimer County Community College**

**100 Reservoir Road**

**Herkimer, NY 13350**

**315-574-4035**

**Fax: 315-866-2908**

**[finaid@herkimer.edu](mailto:finaid@herkimer.edu)**

## **INSTRUCTIONS FOR INCOME VERIFICATION**

The verification process involves verifying income as well as verifying if a student (or parent(s), if applicable) did not file a tax return.

### **IRS VERIFICATION FOR NON-FILING**

#### **For independent students and parents of dependent students who *did not* filed a 2019 income tax return.**

If you did not or were not required to file a 2019 tax return, you will need to submit an *IRS Verification of Non-filing* (for each non-filer).

1. You will need to complete IRS form 4506-T <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
2. Complete lines 1-5
3. Line 7: Select the checkbox on the right hand side of Verification of Non-filing
4. Line 9: Year or period requested field, enter "12/31/2019"
5. Check Signatory Attests box, include phone number and sign and date the application
6. Send the application to: Internal Revenue Service, RAIVS Team, PO Box 145500, Stop 2800 F, Cincinnati, OH 45250 or fax: 855-821-0094
7. You can expect to receive the Non-filing Statement within 5-10 days. Please submit it to the Financial Aid Office.

### **IRS VERIFICATION OF FILING**

#### **For students (and parent(s), if applicable) who filed a 2019 income tax return**

There are three ways the Financial Aid Office can determine that the FAFSA income information is correct.

1. **IRS Data Retrieval Tool (IRS DRT)** - The ***BEST*** way to verify income is by using the IRS Data Retrieval Tool as part of FAFSA application. To use the tool:
  - a. Go to [www.fafsa.gov](http://www.fafsa.gov), login to the student's FAFSA record
  - b. Select "Make FAFSA Corrections"
  - c. Navigate to the FINANCIAL INFORMATION section of the form. From there, follow the instructions to determine if the student and/or parent is eligible to use the IRS Data Retrieval Tool to transfer **2019** IRS income tax information into the student's FAFSA. For a demonstration on how to use this tool, go to: <https://studentaid.ed.gov/sa/resources/irs-drt-text>
2. **IRS Income Tax Return** – You may submit a copy of your 2019 **SIGNED** Income Tax Return to the Financial Aid Office.
3. **IRS Tax Transcript** – There are three ways you can request an IRS Tax Transcript. Make sure to request the "*IRS Tax Return Transcript*" and **NOT** the "*IRS Tax Account Transcript*". You will need your social security number, date of birth, and the exact address used when you filed your tax return.

Note: If you are a parent requesting an IRS Tax Transcript, please list the student's name and ID on the top page of the transcript prior to sending it to the Financial Aid Office so that we can process the student's financial aid.

  - a. **ONLINE:** <https://www.irs.gov/individuals/get-transcript> and select "Get Transcript". You may choose ONLINE or MAIL. By selecting "Get Transcript by Mail" a transcript will be mailed to the requestor within 5-10 days. **THIS CANNOT BE SENT DIRECTLY TO HERKIMER COLLEGE.** When received, please send the tax transcript to the Financial Aid Office.
  - b. **TELEPHONE:** 1-800-829-1040. A transcript will be mailed to the requestor within 5-10 days. **THIS CANNOT BE SENT DIRECTLY TO HERKIMER COLLEGE.** When received, please send the tax transcript to the Financial Aid Office.
  - c. **IRS FORM 4506T-EZ:** <https://www.irs.gov/pub/irs-pdf/f4506tez.pdf>. A transcript will be mailed to the requestor within 5-10 days. When received, please send the tax transcript to the Financial Aid Office.

**IRS Amended Tax Returns** - If an individual filed an amended IRS income tax return for tax year 2019, submit the following to the Financial Aid Office:

- a. A 2019 IRS Tax Return Transcript or a signed copy of your 2019 income tax return; and
- b. A signed copy of the 2019 IRS Form 1040X, "Amended U.S. Individual Income Tax Return" that was filed with the IRS.