

## Independent Student Instructions for Completing Verification 2018-2019 Academic Year

Verification is a process required by the U. S. Department of Education to ensure accuracy of financial aid applications. Our office must collect documentation to verify the information submitted on the Free Application for Federal Student Aid (FAFSA).

### ***Please follow the steps to complete the Verification Worksheet:***

- Students must complete the online Verification Worksheet located at **my.butler.edu (Self Service Student Homepage → Student Center → Finances → Financial Aid → Verification Worksheet 2018-2019)**.
  - Every field must have a value. *Enter “o” when applicable.* Review the untaxed income questions carefully.
- The verification worksheet needs to be signed by the student and if married, the student’s spouse. The electronic submission satisfies the student signature requirement. If applicable upon submission, a pop-up window will appear with instructions to print the worksheet so that your spouse can sign and return the worksheet to our office.

### ***For tax filers, please complete the steps to provide your 2016 federal income tax information:***

- Complete the IRS Data Retrieval tool (preferred method) using the “Make FAFSA Corrections” link at [www.fafsa.gov](http://www.fafsa.gov).
  - If you are unable to utilize the IRS Data Retrieval tool, request a **2016 IRS Tax Return Transcript** using one of the following options:  
Online Request – Go to [www.irs.gov](http://www.irs.gov), click **"Get My Tax Record."** Click “Get Transcript ONLINE” or “Get Transcript by MAIL.” *Make sure to request the “IRS Tax Return Transcript” and NOT the “IRS Tax Account Transcript.” The IRS Declaration of Electronic Filing (e-file) is not a tax return and is not acceptable* documentation to complete verification.
    - Telephone Request – 1-800-908-9946
    - Paper Request Form – Form 4506T-EZ or Form 4506-T
  - If you (or your spouse, if married) filed an **amended** federal tax return (1040X) with the IRS, then you must submit the following:
    - Signed copy of your original 2016 1040 tax return
    - Signed copy of your 1040X
    - IRS tax transcript (see instructions above)
  - If you (or your spouse, if married) have an outstanding 2016 tax **extension**, then you must submit the following:
    - **Approved** IRS Form 4868 - Application for Filing an Extension
    - Signed *drafted* federal tax return
    - W-2(s), income statements, and 1099(s)
    - Please submit the IRS Verification of Non-filing Letter by visiting [www.irs.gov](http://www.irs.gov) click **"Get My Tax Record"** or by using IRS form 4506-T and check box 7.  
*We encourage you to complete the IRS Data Retrieval Tool or submit an IRS Tax Transcript when you have filed your tax return.*
  - If you (or your spouse, if married) have a **rollover** on your 2016 Federal 1040, you must submit the following:
    - IRS tax transcript
    - 1099R documentation or other proof of a rollover

### ***For non-tax filers - please complete the steps below to provide your 2016 untaxed income information:***

- All the following items are required for federal tax non-filers:
  - Please visit [www.irs.gov](http://www.irs.gov). Search and print the Form 4506T. Complete (lines 1-5, 7 and 9). Check Signatory attest box, sign, date and fax or mail to the IRS. When you receive the Verification of Non Filing Letter submit it to our office.
  - Submit copies of all W-2 forms for 2016 for each source of income received (or an equivalent document such as the Wage and Income Transcript from the IRS).

**Please submit all documents to the Office of Financial Aid.** Contact information is provided below for email and fax (preferred methods). You may also mail to:

Butler University • Office of Financial Aid • 4600 Sunset Avenue • Indianapolis, IN 46208