The federal government selects approximately 30% of our student population for verification, which requires families to submit additional information to our office.

**Verification Requirements:**
- Verification Worksheet Dependent Student or Verification Worksheet Independent Student
- Parent(s): IRS Tax Return Transcript or Data Retrieval via FAFSA on the Web or Verification of Non-filing Letter
- Student: IRS Tax Return Transcript or Data Retrieval via FAFSA on the Web or Verification of Non-filing Letter

**Document Description:**
- The Verification Worksheet Dependent Student and Verification Worksheet Independent Student are both forms available online at www.oxy.edu/financial-aid/forms
- An IRS Tax Return Transcript is an official document from the Internal Revenue Service (IRS) that summarizes the information on the tax return you filed. You can obtain this document online through the IRS website, by phone, or by completing IRS Form 4506-T and mailing or faxing it to the IRS.
- Data Retrieval via FAFSA on the Web allows you to electronically transfer your tax data directly into your FAFSA. If you go through this process, you are not required to submit an IRS Tax Return Transcript.
- A Verification of Non-filing Letter is an official document from the IRS indicating that you did not file a tax return. You can obtain this document online through the IRS website or completing IRS Form 4506-T and mailing or faxing it to the IRS.

**Deadlines:**
These verification requirements are due by **July 1, 2017**. Although we will be able to issue a tentative financial aid award without these requirements, the student’s award will not be official until we receive this documentation. **Without these documents, we will not be able to post financial aid to the student’s account in time for the first bill of the fall semester.** If these requirements are not submitted, your financial aid will be placed in an inactive status and may be cancelled. For more details, please visit our website at www.oxy.edu/financial-aid/verification-requirements.

**DATA RETRIEVAL VIA FAFSA**
If you use Data Retrieval via FAFSA on the Web, it will take 1-3 business days for our office to receive your updated information.

1. Go to the FAFSA website (www.fafsa.ed.gov)
2. Click “Login”
3. Input the student’s information (Name, SSN, DOB)— click next
4. Scroll down and click on the link “Make FAFSA Corrections”
5. Enter the student’s PIN and password information— click next
6. Click on the “Financial Information” tab at the top of the page
7. Double check that your filing status is “Already Completed”
8. You should see a box under the marital status question that says “You, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS”
9. Read the information to see if you are eligible to use the IRS Data Retrieval tool— in order to be eligible to retrieve tax data, your answer to both questions must be “no”
10. If eligible, enter which person is requesting the data and enter that person's FSA ID— click on “Link to IRS”— if not eligible, you must request an IRS Tax Return Transcript (see page 2)
11. You will be notified that you are leaving FAFSA on the web— click “OK”
12. You should now be on the IRS website— enter the requested information regarding tax filing status and address— click “Submit” on lower right corner— the address you enter must match exactly the address on your tax return
13. Review tax data that will be transferred— scroll to the bottom of the page and check mark “Transfer My Tax Information into the FAFSA”— click “Transfer Now”
14. You should receive a message that says “Application was successfully saved”— do not make any adjustments to this data, otherwise the retrieval will be invalid
15. Scroll down to the bottom of the page and click “Save”
16. Repeat steps 7-14 if retrieving data for both student and parent(s) tax information
17. Click on the “Sign & Submit” tab at the top
18. Scroll to the bottom of the “Sign & Submit” section and click next
19. Sign the FAFSA (the student and parent must sign this corrected FAFSA)— click the “Submit my FAFSA Now” link
If you use the online request, you will immediately receive your IRS Tax Return Transcript or IRS Verification of Non-filing Letter. Please note, you will only be able to use this option if you have a valid email address and an established financial account (such as a credit card, mortgage, or car loan)/

1. Go to the IRS website (www.irs.gov)
2. Click the orange “Tools” tab
3. Click “Get Transcript”
4. Click “Get Transcript Online”
5. Log-in or Create a Login
6. If creating a login—Click the “Get Started” icon
7. Follow steps 1-6 to set-up your account and request your transcript
8. Step 1- enter personal information (first name, last name, e-mail address)
9. Step 2- retrieve Confirmation Code that was sent to your e-mail address—enter confirmation code and click “Verify e-mail confirmation code”
10. Step 3- enter personal information (social security number, day of birth, filing status, address) — select the option to “Create a User ID and password” or “Proceed as Guest”— click “Continue”
11. Step 4 – answer security questions— click “Continue”
12. Step 5- Select reason for requesting a transcript— select “Higher Education/Student Aid”— click “Go”— under “Return Transcript” select 2015 for the year
13. Step 6- If successful, your 2015 IRS Tax Return Transcript or IRS Verification of Non-filing Letter should have opened in a new window— if not, double check that your pop-up blocker is off
14. Save your transcript or non-filing letter to your desktop

If you request your IRS Tax Return Transcript by phone, it will be mailed to the address listed on your taxes within 5-10 business days.

1. To request an IRS Tax Return Transcript or Tax Account Transcript by phone call 1-800-908-9946.
2. Follow the prompts and enter your personal information.
3. For a Tax Return Transcript press option 2, for a Tax Account Transcript press option 1

You can complete Form 4506-T and mail or fax your request for an IRS Tax Return Transcript or an IRS Verification of Non-filing Letter. After the IRS receives your request, it can take 5-10 business days for your transcript or non-filing letter to be mailed to the address you list on your form. You can request that your document be sent directly to our office by completing Line 5. If so, please make sure to list the following address: Financial Aid Office, Occidental College, 1600 Campus Road F-35, Los Angeles, CA 90041.

1. Go to the IRS website (www.irs.gov)
2. Click the orange “Forms & Pubs”
3. Find & download Form 4506-T
4. Answer questions 1-5
5. To request an IRS Tax Return Transcript check box 6a
6. To request an IRS Verification of Non-filing Letter check box 7
7. Answer question 9 to request your transcript or non-filing letter for the 2015 tax year by entering 12/31/2015 in one of the boxes
8. Sign and date
9. Mail or fax this form to your state's IRS office (see page 2 of the 4506-T form for addresses and fax numbers)