

## **2020-2021 Dependent Verification Worksheet Instructions**

**For Priority Processing Submit Form by July 15, 2020**

Failure to submit all documents together may result in a processing delay or less financial aid.

- (1) Complete the Verification Worksheet and all additional information as requested
- (2) Submit Tax Information or Verification of Non-Filing Status to Student Financial Aid and Scholarships for parent and student
- (3) Include your University ID Number (UIN) on every page of your tax documents

### **Complete the VERIFICATION WORKSHEET**

- SIGN the form with handwritten signatures (no electronic signatures)
- Answer **ALL** questions

#### **2018 TAX FILERS**

##### **Parents and Students**

##### **IRS DATA RETRIEVAL TOOL (DRT) (Preferred Method)**

- Sign into <https://studentaid.ed.gov/sa/fafsa>
- Select parent/student finances page
- Select "Link to IRS" and complete steps with IRS
- Data will show as "Transferred from the IRS"

**OR**

##### **SIGNED IRS FEDERAL TAX RETURN**

- Submit a signed copy of the IRS Federal Tax Return including IRS Schedules 1, 2, and 3
- Include UIN on all pages of signed tax return

#### **2018 NON-TAX FILERS**

##### **Parents**

##### **VERIFICATION OF NON-FILING LETTER From the IRS**

- Contact the IRS at:  
<https://www.irs.gov/individuals/get-transcript>
- Mail or Fax *Form 4506-T* to the IRS  
<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
- Submit the Verification of Non-Filing Letter received from the IRS – include UIN
- Submit all 2018 W-2 and 1099 forms – include UIN

#### **2018 UNUSUAL TAX FILING SITUATIONS**

Individuals who fall into one of the IRS Tax categories below must submit the listed information.

##### **AMENDED TAX FILERS:**

- Signed copy of the 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3
- A signed copy of the 2018 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS
- An official 2018 IRS Account Transcript indicating the 1040X was processed.

##### **NON-IRS TAX RETURNS:** (Individuals who filed a tax return in a foreign country, Puerto Rico, or U.S. Territory)

- Signed copy of the filed 2018 tax return
- Convert amounts earned to U.S. currency, providing the equivalent to each parent's income from work, Adjusted Gross Income, Income Taxes Paid

##### **IRS IDENTITY THEFT VICTIMS:**

- Tax Return Database View (TRDBV) transcript for 2018
- Signed and dated statement (by both parents) indicating the individuals were a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft



# 2020-2021 Dependent Verification Worksheet

## Section C – Parent Income Information

Your parents MUST provide official 2018 federal tax information to the UIS Office of Financial Assistance. Each parent listed on the FAFSA and in the Household Information section must provide information.

- (1) Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application: \*This is the preferred method\*
  - (a) Log into your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
  - (b) Elect to use the Data Retrieval process.
  - (c) You will be taken to the IRS website where you will enter personal information to process the retrieval. Check the "Transfer My Tax Information into the FAFSA" box.
  - (d) Once completed, you will return to the FAFSA, make sure to sign electronically with your FSA ID.  
**\*\*If successful, you will not need to provide a copy of your tax return transcript to our office.  
 \*\*if unsuccessful please provide the items listed for items 2 or 3.**
- (2) Submit a copy of the signed IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2018 IRS Federal Tax Return, submit a Verification of Non-Filing letter obtained from the IRS **and** a copy of all W-2/1099 forms if wages were earned.

ONLY **one (1) box** should be checked on this page.  
Please check the appropriate box and submit the requested documents.

### 2018 TAX FILERS

- I/We have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I/We have attached a copy of my signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with the student's UIN on all pages.

### 2018 TAX FILERS with special circumstances

- I/We filed a 2018 amended tax return and have submitted (1) a signed 1040X and (2) a copy of my signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 and (3) an official 2018 IRS Account Transcript indicating the 1040X was processed.
- I/We filed a foreign tax return and have submitted that return with the Earnings, AGI, and Taxes Paid translated to US dollars, along with wage statements.
- I/We am a victim of tax related identity theft and have notified the IRS. Attached is the Tax Return Database View Transcript for 2018 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

### 2018 NON-TAX FILERS

- I/We did earn income from work in 2018, but I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.  
**\*\*\*\*I have attached:**
- (1) Copies of 2018 W-2 forms/1099 Misc. forms AND
  - (2) **Verification of Non-Filing Letter from the IRS**

| Individual's Name | Name of Employer | Amount of 2018 Income |
|-------------------|------------------|-----------------------|
|                   |                  |                       |
|                   |                  |                       |

- I did not earn income from wages in 2018. I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS.  
**\*\*\*\*A Verification of Non-Filing Letter from the IRS is attached.**

ENTER YOUR UIN →

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## Section D – Student Income Information

You MUST provide official 2018 federal tax information to the UIS Office of Financial Assistance.

- (1) Complete the IRS Data Retrieval Tool on the FAFSA application **\*This is the preferred method\***
  - (a) Log into your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
  - (b) Elect to use the Data Retrieval process.
  - (c) You will be taken to the IRS website where you will enter personal information to process the retrieval. Check the "Transfer My Tax Information into the FAFSA" box.
  - (d) Once completed, you will return to the FAFSA, make sure to sign electronically with your FSA ID.  
**\*\*If successful, you will not need to provide a copy of your tax return transcript to our office.  
 \*\*If unsuccessful please provide the items listed for items 2 or 3.**
- (2) Submit a copy of the signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS
- (3) For those who did not file a 2018 IRS Federal Tax Return, submit a copy of all W-2/1099 forms if wages were earned.

ONLY **one (1) box** should be checked **on this page**.

Please check the appropriate box and submit the requested documents.

### 2018 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with my UIN on all pages.

### 2018 TAX FILERS with special circumstances

- I filed a 2018 amended tax return and have submitted (1) a signed 1040X and (2) a copy of my signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 and (3) an official 2018 IRS Account Transcript indicating the 1040X was processed.
- I filed a foreign tax return and have submitted that return with the Earnings, AGI, and Taxes Paid translated to US dollars, along with wage statements.
- I am a victim of tax related identity theft and have notified the IRS. Attached is the Tax Return Database View Transcript for 2018 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

### 2018 NON-TAX FILERS

- I did earn income from work in 2018, but I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.  
**\*\*\*\*I have attached:** Copies of 2018 W-2 forms/1099 Misc. forms

| Individual's Name | Name of Employer | Amount of 2018 Income |
|-------------------|------------------|-----------------------|
|                   |                  |                       |
|                   |                  |                       |

- I did not earn income from wages in 2018. I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS.

## Section E – Student and Parent Signatures

By signing this worksheet, I/we certify that all the information reported on this worksheet is correct to the best of our knowledge. If the UIS Office of Financial Assistance notices a discrepancy, I/we understand corrections to my FAFSA will be submitted directly to the U.S. Department of Education. Additionally, I/we understand that any such corrections may also warrant an adjustment to any financial aid that has already been offered for the 2020-21 academic year.

Student Signature

Date

Parent's Signature

Date

**IMPORTANT: To avoid a delay in processing, please review to make sure that every question has been answered and that you have provided all additional documents per the instructions. Submit all documents at the same time in person, via mail to the UIS Office of Financial Assistance or upload in self-service (please do not email/fax).**

ENTER YOUR UIN →

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