

## **2021-2022 Dependent Verification Worksheet Instructions**

**For Priority Processing Submit Form by July 15, 2021**

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) Upload Tax Information or Verification of Non-Filing Status to Enterprise Self-Service Student Requirements under the Financial Aid tab.

### **Complete the VERIFICATION WORKSHEET**

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

#### **2019 TAX FILERS**

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

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

- Sign into <https://studentaid.gov/h/apply-for-aid/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

#### **2019 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>
- Call the IRS local office at (217) 993-6783 to pick up letter at 3101 Constitution Drive, Springfield
- Submit the Verification of Non-Filing Letter received from the IRS – include UIN
- Submit all 2019 W-2 and 1099 forms – include UIN

#### **2019 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 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 OR complete the IRS Data Retrieval Tool
- A signed copy of the 2019 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS

##### **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 2019 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 2019
- 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



# 2021-2022 Dependent Verification Worksheet

## Section C – Parent Income Information

Your parents MUST provide official 2019 federal tax information to the 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 **OR**
- (2) Submit a copy of the signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2019 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.

### 2019 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with the student's UIN on all pages.

### 2019 TAX FILERS with special circumstances

- I filed a 2019 amended tax return and have submitted (1) a signed 1040X and (2) either have completed the FAFSA IRS Data Retrieval Tool or submitted a copy of my signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3.
- 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 2019 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

### 2019 NON-TAX FILERS

- I did earn income from work in 2019, but I did not and was not required to file a 2019 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.  
**\*\*\*\*I have attached:**

- (1) Copies of 2019 W-2 forms/1099 Misc. forms AND
- (2) **Verification of Non-Filing Letter from the IRS**

Individual's Name	Name of Employer	Amount of 2019 Income

- I did not earn income from wages in 2019. I did not and was not required to file a 2019 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 2019 federal tax information to the Office of Financial Assistance.

- (1) Complete the IRS Data Retrieval Tool on the FAFSA application **OR**
- (2) Submit a copy of the signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2019 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.

### 2019 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with my UIN on all pages.

### 2019 TAX FILERS with special circumstances

- I filed a 2019 amended tax return and have submitted (1) a signed 1040X and (2) either have completed the FAFSA IRS Data Retrieval Tool or submitted a copy of my signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3.
- 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 2019 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

### 2019 NON-TAX FILERS

- I did earn income from work in 2019, but I did not and was not required to file a 2019 IRS Federal Tax Return Per the IRS. All income sources/amounts are listed below.  
**\*\*\*\*I have attached: Copies of 2019 W-2 forms/1099 Misc. forms**

Individual's Name	Name of Employer	Amount of 2019 Income

- I did not earn income from wages in 2019. I did not and was not required to file a 2019 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 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 2021-22 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. Upload all documents to Enterprise Self-Service Student Requirements under the financial aid tab.**

ENTER YOUR UIN →

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