University of Illinois Springfield – Office of Financial Assistance

One University Plaza, MS UHB 1015 -- Springfield, Illinois 62703-5407 -- Phone: (217) 206-6724 https://www.uis.edu/cost-aid/financial-aid

2022-2023 Dependent Verification Worksheet Instructions

For Priority Processing Submit Form within 15 business days

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.

2020 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 <u>signed</u> copy of the 2020 IRS Federal Tax Return including IRS Schedules1, 2, and 3
- Include UIN on all pages of signed tax return

2020 NON-TAX FILERS

Parents

VERIFICATION OF NON-FILING LETTER From the IRS

 Contact the IRS to request verification of non-filing at: https://www.irs.gov/individuals/get-transcript

<u>OR</u>

 Mail or Fax <u>Form 4506-T</u> to the IRS https://www.irs.gov/pub/irs-pdf/f4506t.pdf

<u>OR</u>

 Call the IRS local office at (217) 993-6783 to pick up letter at 3101 Constitution Drive, Springfield, IL 62704

Then

- Submit the Verification of Non-Filing Letter received from the IRS - include UIN
- Submit all 2020 W-2 and 1099 Forms include UIN

2020 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 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 OR complete the IRS Data Retrieval Tool
- A signed copy of the 2020 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 2020 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 2020
- Signed and dated statement (by both parents) indicating the individuals were a victim of IRS taxrelated identity theft and the IRS is aware of the tax-related identity theft

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Section A – Student	Information	(Please prin	t clearly)
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Last Name	First Name	M.I.	Phone Number	
Street Address	City	State	Zip Code	

Section B - Household Information (Please read instructions below before completing)

Please list the people in your parent(s)' household, including:

- (1) yourself (even if you don't live with your parents)
- (2) your parent, or parents if married/living together, and/or step-parent if married according to FAFSA guidelines
- (3) your parents' other children if:
 - (a) your parents will provide more than half of their support between July 1, 2022 and June 30, 2023 OR
 - (b) the children would be required to provide parental information when applying for Federal Student Aid
- (4) other dependents if:
 - (a) they now live with your parents AND
 - (b) your parents provide more than half of their support and will continue to provide more than half of their support between **July 1, 2022 and June 30, 2023**

Fill out the chart below - all fields must be completed.

Write the names of all household members as defined above. If you need more space, attach a separate sheet. Write in the name of the college for any household member listed (excluding parent(s)), who will be attending college at least half-time between **July 1, 2022 and June 30, 2023,** in a program that leads to a college degree/certificate. If the household member's college is UIS, write their University Identification Number (UIN) in the box along with UIS listed as the college.

Full Name	Age	Relationship	College	Expected College Graduation (Month and Year)
		Self	UIS	

ENTER YOU	R 9-DIGIT UIN	→					
2223	DPVR-O	N					

2022-2023 Dependent Verification Worksheet

Section C – Parent Income Information

Your parents MUST provide official 2020 federal tax information to the Office of Financial Assistance. Each parent listed on the FAFSA and in the Household Information section must provide information.

- Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application OR
- Submit a copy of the signed 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS OR
- For those who did not file a 2020 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.

	_	should be checked opropriate box and	ed on this page. submit the requested docu	ments.						
2020 TAX F	FILERS	<u>S</u>								
		I have successfully lin	nked the IRS Data Retrieval Tool	to the FAFSA.						
		I have attached a copy of my signed 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with the student's UIN on all pages.								
2020 TAX F	ILERS	S with special cir	<u>rcumstances</u>							
		completed the FAFSA		(1) a signed 1040X and (2) either hav mitted a copy of my signed 2020 IRS I 3.	'e					
			turn and have submitted that retu d to US dollars, along with wage							
		I am a victim of tax related identity theft and have notified the IRS. Attached is the Tax Return Database View Transcript for 2020 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.								
2020 NON-	TAX F	ILERS								
	I did earn income from work in 2020, but I did not and was not required to file a 2020 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below. I have attached:									
	 (1) Copies of 2020 W-2 forms/1099 Misc. forms AND (2) Verification of Non-Filing Letter from the IRS 									
	Inc	Individual's Name Name of Employer Amount of 2020 Income								
		I did not earn income r Federal Tax Return po		d was not required to file a 2020 IRS						

ENTER YOUR UIN

Section D - Student Income Information

You MUST provide official 2020 federal tax information to the Office of Financial Assistance.

- Complete the IRS Data Retrieval Tool on the FAFSA application OR
- Submit a copy of the signed 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS OR
- For those who did not file a 2020 IRS Federal Tax Return, submit a copy of all W-2/1099 forms if wages were earned.

		snould be check appropriate box and			_	docum	nents.					
2020 T	AX FILER	<u>s</u>										
		I have successfully l	inked the IR	S Data F	Retrieva	l Tool to	the FAI	FSA.				
		I have attached a co and 3 sent to the IRS				ederal ⁻	Tax Retu	ırn inclu	ding IRS	S Sched	dules 1,	2,
2020 T <i>A</i>	AX FILER	S with special c	<u>ircumsta</u>	nces								
		I filed a 2020 amend completed the FAFS Tax Return including	A IRS Data	Retrieva	l Tool o	r submi	,		,	,		eral
		I filed a foreign tax re Taxes Paid translate							gs, AGI	, and		
		I am a victim of tax r Database View Tran tax related identity th	script for 20									f the
<u>2020 NC</u>	N-TAX FI	<u>LERS</u>										
		I did earn income fro Tax Return Per the I I have attached: Co	RS. All inco	me sour	ces/amo	ounts a	re listed	below.	to file a	2020 IR	S Feder	al ·
	I	ndividual's Name	Nam	ne of Emp	oloyer		Amount of 2020 Income					
		I did not earn income IRS Federal Tax Re	turn per the	IRS.). I did r	not and	was not	require	d to file a	a 2020		
		ident and Parer										
of Financial of Educatio	l Assistance n n. Additionally	t, I/we certify that all the intices a discrepancy, I/w /, I/we understand that ar 2-23 academic year.	e understand	correctio	ns to my	/ FAFSA	will be s	ubmitted	directly t	to the U.	S. Depar	tment
Student Sig	gnature	Date	F	Parent's S	Signatur	re		Date				
nave provi	ded all additi	a delay in processing, ponal documents per the efinancial aid tab.										ou
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