

## 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>

### **2023-2024 Independent 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 Student Self-Service Student Requirements under the Financial Aid tab.

#### **2021 TAX FILERS**

##### **Student and Spouse**

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

- Sign into <https://studentaid.gov/h/apply-for-aid/fafsa>
- Select spouse/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 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3
- Include UIN on all pages of signed tax return

#### **2021 NON-TAX FILERS**

##### **Student and Spouse**

#### **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>

**OR**

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

**OR**

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

**Then**

- Submit the Verification of Non-Filing Letter received from the IRS - include UIN
- Submit all 2021 W-2 and 1099 Forms - include UIN

#### **2021 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 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 OR complete the IRS Data Retrieval Tool
- A signed copy of the 2021 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 2021 tax return
- Convert amounts earned to U.S. currency, providing the equivalent to the student and spouse's income from work, Adjusted Gross Income, Income Taxes Paid

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

- Tax Return Database View (TRDBV) transcript for 2021
- Signed and dated statement (by both student and spouse) indicating the individuals were a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft



# 2023-2024 Dependent Verification Worksheet

## Section C – Student Income Information

You **MUST** provide official 2021 federal tax information to the Office of Student Financial Assistance.

- (1) Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application **OR**
- (2) Upload a copy of the signed 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2021 IRS Federal Tax Return, upload 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.

### 2021 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with the student's UIN on all pages.

### 2021 TAX FILERS with special circumstances

- I filed a 2021 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 2021 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 2021 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

### 2021 NON-TAX FILERS

- I did earn income from work in 2021, but I did not and was not required to file a 2021 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.

**I have attached:**

- (1) Copies of 2021 W-2 forms/1099 Misc. forms AND
- (2) **Verification of Non-Filing Letter from the IRS**

Individual's Name	Name of Employer	Amount of 2021 Income

- I did not earn income from wages in 2021. I did not and was not required to file a 2021 IRS Federal Tax Return per the IRS.

ENTER YOUR UIN →

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## Section D – Student's Spouse's Income Information

You MUST provide official 2021 federal tax information to the Office of Financial Assistance.

- (1) Complete the IRS Data Retrieval Tool on the FAFSA application **OR**
- (2) Upload a copy of the signed 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2021 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.

### 2021 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2021 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with my UIN on all pages.

### 2021 TAX FILERS with special circumstances

- I filed a 2021 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 2021 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 2021 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

### 2021 NON-TAX FILERS

- I did earn income from work in 2021, but I did not and was not required to file a 2021 IRS Federal Tax Return Per the IRS. All income sources/amounts are listed below.  
**I have attached:**  
 (1) Copies of 2021 W-2 forms/1099 Misc. forms  
 AND  
 (2) **Verification of Non-Filing Letter from the IRS**

Individual's Name	Name of Employer	Amount of 2021 Income

- I did not earn income from wages in 2021. I did not and was not required to file a 2021 IRS Federal Tax Return per the IRS.

## Section E – Student and Spouse 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 2023-24 academic year.

Student Signature

Date

Spouse's Signature

Date

**IMPORTANT: Signatures MUST be either a wet signature or signed electronically with a stylus or finger. 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 Student Self-Service Student Requirements under the financial aid tab.**

ENTER YOUR UIN →

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