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 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 Student Self-Service Student Requirements under the Financial Aid tab.

2021 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 2021 IRS Federal Tax Return including IRS Schedules1, 2, and 3
- · Include UIN on all pages of signed tax return

2021 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

OR

 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 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 each parent'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 parents) indicating the individuals were a victim of IRS taxrelated identity theft and the IRS is aware of the tax-related identity theft

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 Dependent Verification Worksheet

For Priority Processing Submit Form within 15 business days

Section A – Student Information	on (Please print clearly)
---------------------------------	---------------------------

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, 2023 and June 30, 2024 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, 2023 and June 30, 2024**

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, 2023 and June 30, 2024,** 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 YO	OUR 9-DIGIT UIN	\rightarrow					
2324	DPVR-E	N					

2023-2024 Dependent Verification Worksheet

Section C – Parent Income Information

Your parents MUST provide official 2021 federal tax information to the Office of Financial Assistance. Each parent/step-parent listed on the FAFSA must provide information.

- Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application OR
- Submit 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 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 t	the ap	propriate box and	submit the requested docu	ments.					
2021 TAX FIL	LERS	3							
		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 FIL	ERS	with special cir	rcumstances						
Ē		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.							
E		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-T <i>A</i>	AX FI	<u>LERS</u>							
E		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								
	Ind	lividual's Name	Name of Employer	Amount of 2021 Income					
Ľ		l did not earn income Federal Tax Return p		d was not required to file a 2021 IRS					

Section D - Student 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) Submit 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 chec	k the a	ppropriate box and	submit the requ	ested docu	iments.				
2021 TAX F	FILER	<u>s</u>							
	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 F	FILER	S with special ci	rcumstances						
		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-T	AX FI	<u>LERS</u>							
	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: Copies of 2021 W-2 forms/1099 Misc. forms								
	Individual's Name								
		I did not earn income IRS Federal Tax Ret	_	1. I did not an	d was not required to file a 20	21			
Section F	– Stu	dent and Paren	·						
By signing this w of Financial Assi of Education. Ad	orksheet stance no Iditionally	, I/we certify that all the in otices a discrepancy, I/we	nformation reported of understand correcti	ons to my FAF	et is correct to the best of our kno SA will be submitted directly to the an adjustment to any financial ai	e U.S. Department			
Student Signature Date			Parent's	Signature	Date				
processing, plea	ase revie	ew to make sure that eve	ery question has be	en answered a	with a stylus or finger. To avoid and that you have provided all a sudent Requirements under the	additional			
					 				
ENT	TER YO	OUR UIN -							

Page 3 of 3