

# University of Illinois Springfield -- Office of Financial Aid

## 2024-2025 Dependent Verification Worksheet Instructions

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**For Timely Processing Submit Form within 15 business days.**

**Failure to submit all documents together may result in a processing delay.**

### What you should do:

- (1) Complete the Verification Worksheet and all additional information as requested
- (2) Signatures **MUST** be either a wet signature or signed electronically with a stylus or finger.
- (3) To avoid a delay in processing, please review to make sure that every question has been answered. Upload all documents to the Financial Aid Home Page on Student Self-Service.
- (4) Please include the student's University Identification Number (UIN) on all supporting documentation.

### 2022 TAX FILERS Parents and Students

- Student and parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form.
  - If 2022 income tax return information was not imported from the IRS, please submit the following:
    - 2022 IRS Tax Return Transcript (visit [www.irs.gov](http://www.irs.gov) to request)
- OR**
- A signed copy of the 2022 IRS Federal Tax Return (1040) including IRS Schedules.

### 2022 UNUSUAL TAX FILING SITUATIONS

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

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

- Amendment: A signed copy of the 2022 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the changes; **AND**
- Original Return: Signed copy of the 2022 IRS Federal Tax Return including IRS Schedules or a 2022 IRS Tax Return Transcript

#### **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 2022 tax return; **AND**
- Convert amounts earned to U.S. currency, providing the equivalent to each tax filer's income from work, Adjusted Gross Income, Income Taxes Paid

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

- Tax Return Database View (TRDBV) transcript for 2022 obtained from the IRS; **AND**
- Signed and dated statement by the tax filer indicating the individuals were a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft.

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### Section A : Student Information (Please print clearly)

UIN :	_____	Email :	_____
Last Name :	_____	Current Address :	_____
First Name :	_____	City & State :	_____
M.I. :	_____	Zip Code :	_____

### Section B – Family Size (Please read instructions below before completing)

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

- (1) The student.
- (2) The student's parents, even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce.
- (3) The student's siblings if:
  - (a) They live with the student's parents or live apart because of college enrollment);
  - (b) They receive more than half of their support from the student's parents; and
  - (c) They will continue to receive more than half their support from the student's parents during the award year.
- (4) Other persons if the following are true:
  - (a) They live with the student's parents and they receive more than half of their support from the student's parents;
  - (b) They will continue to receive more than half their support from the student's parents during the award year.
  - (c) Unborn children should not be included in family size.

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

Full Name	Age	Relationship
		Self

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### Section C – Parent Income Information

Parents listed on the FAFSA must provide official 2022 federal tax information to the Office of Financial Assistance. Each parent contributor listed on the FAFSA must provide the following information:

- (1) Consent to import Federal Tax Information (FTI) directly from the IRS; OR
- (2) Submit a 2022 Tax Return Transcript or a copy of the signed 2022 IRS Federal Tax Return including IRS Schedules.

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

#### **2022 TAX FILERS**

I/We have consented to import Federal Tax Information (FTI) directly from the IRS on the FAFSA.

I/We have attached 2022 Tax return Transcript(s) or a copy, or copies, of the signed 2022 IRS Federal Tax Return (1040) including IRS Schedules.

#### **2022 TAX FILERS with unusual circumstances**

I/We filed a 2022 amended tax return and have submitted (1) a signed 1040X and (2) have consented to import Federal Tax Information directly from the IRS, submitted and IRS tax transcript or submitted a copy of my signed 2022 IRS Federal Tax Return including IRS Schedules.

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 are a victim of tax related identity theft and have notified the IRS. Attached is the Tax Return Database View Transcript for 2022 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

#### **2022 NON-TAX FILERS**

One or both parents were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the parents by their employers]. List every employer even if the employer did not issue an IRS W-2 form.

Name of Employer	IRS W-2/Equivalent Document Provided? (Y/N)	Amount of 2022 Income

Neither parent was employed, and neither had income earned from work in 2022.

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### Section D – Student Income Information

The student must provide the following information:

- (1) Consent to import Federal Tax Information (FTI) directly from the IRS; OR
- (2) Submit a 2022 Tax Return Transcript or a copy of the signed 2022 IRS Federal Tax Return including IRS Schedules.

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

Please check the appropriate box and submit the requested documents.

#### **2022 TAX FILERS**

I have consented to import Federal Tax Information (FTI) directly from the IRS.

I have attached an IRS Tax Transcript or a copy of my signed 2022 IRS Federal Tax Return including IRS Schedules

#### **2022 TAX FILERS with special circumstances**

I filed a 2022 amended tax return and have submitted (1) a signed 1040X and (2) have consented to import Federal Tax Information directly from the IRS, submitted and IRS tax transcript or submitted a copy of my signed 2022 IRS Federal Tax Return including IRS Schedules.

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 2022 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

#### **2022 NON-TAX FILERS**

I was employed in 2022 and has listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document is provided. [Provide copies of all 2022 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the

Name of Employer	IRS W-2/Equivalent Document Provided? (Y/N)	Amount of 2022 Income

I was not employed and had no income earned from work in 2022.

I certify that I have not filed and am not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

### 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 2024-25 academic year.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's Signature

\_\_\_\_\_  
Date