

2025-2026 Independent Verification Worksheet Instructions

**For Timely Processing Submit Form within 15 business days. Failure to submit all documents may result in a processing delay. Deadlines for submission are November 15 for Fall term, April 15 for Spring term, and June 15 for Summer term.**

**What you should do:**

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

**2023 TAX FILERS**

**Students and Spouses**

- Students and spouses will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form. If 2023 income tax return information was not imported from the IRS, please submit the following:
  - 2023 IRS Tax Return Transcript (visit [www.irs.gov](http://www.irs.gov) to request) **OR**
  - A signed copy of the 2023 IRS Federal Tax Return (1040) including IRS Schedules.

**2023 UNUSUAL TAX FILING SITUATIONS**

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

**AMENDED TAX FILERS:** An individual who filed an amended IRS income tax return for tax year 2023 must provide:

- A signed copy of the 2023 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 made by the IRS; **AND**
- A signed copy of the 2023 IRS Form 1040 and the applicable schedules or a 2023 IRS Tax Return Transcript

**NON-IRS TAX RETURNS:** (Individuals who filed a tax return in a foreign country, Puerto Rico, or U.S. Territory)

- A signed copy of the filed 2023 tax return; **AND**
- Convert amounts earned to U.S. currency, providing the equivalent to each tax filer's income from work, Adjusted Gross Income, and Income Taxes Paid

**IRS IDENTITY THEFT VICTIMS:**

- A copy of the signed 2023 income tax return and applicable schedules; **AND**
- An IRS 4674C (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS Tax-related identity theft, and the IRS is aware of it.

# University of Illinois Springfield -- Office of Financial Aid

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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 household, including:**

- (1) The student and the student's spouse.
- (2) The student's dependent children if the following are true:
  - (a) They live with the student (or live apart because of college enrollment);
  - (b) They receive more than half of their support from the student; and
  - (c) They will continue to receive more than half of their support from the student during the award year.
- (3) Other persons if the following are true:
  - (a) They live with the student, and they receive more than half of their support from the student; and
  - (b) They will continue to receive more than half their support from the student 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 – Student Income Information

You must provide official 2023 federal tax information to the Office of Financial Assistance.

- (1) Consent to import Federal Tax Information (FTI) directly from the IRS; **OR**
- (2) Submit a 2023 Tax Return Transcript or a copy of the signed 2023 IRS Federal Tax Return including IRS Schedules.

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

#### 2023 TAX FILERS

- ☐ I have consented to import Federal Tax Information (FTI) directly from the IRS on the FAFSA.
- ☐ I have attached 2023 Tax return Transcript(s) or a copy of the signed 2023 IRS Federal Tax Return (1040) including IRS Schedules.

#### 2023 TAX FILERS with unusual circumstances

- ☐ I filed a 2023 amended tax return and have submitted (1) a signed 1040X and (2) have consented to import Federal Tax Information directly from the IRS or submitted an IRS tax transcript or submitted a copy of my signed 2023 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 signed 2023 income tax return and applicable schedules and an IRS 4674C letter or a signed, dated statement indicating the IRS is aware of the tax related identity theft.

#### 2023 NON-TAX FILERS

- ☐ I did earn income from work in 2023 and have listed the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form, or an equivalent document is provided. [Provide copies of all 2023 IRS W-2 forms]. 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 2023 Income

- ☐ I did not earn income from wages in 2023.

I certify that I have not filed and am not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

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

\_\_\_\_\_  
Date

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

You must provide official 2023 federal tax information to the Office of Financial Assistance.

(1) Consent to import Federal Tax Information (FTI) directly from the IRS; **OR**

(2) Submit a 2023 Tax Return Transcript or a copy of the signed 2023 IRS Federal Tax Return including IRS Schedules.

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

#### **2023 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 2023 IRS Federal Tax Return including IRS Schedules

#### **2023 TAX FILERS with special circumstances**

- ☐ I filed a 2023 amended tax return and have submitted (1) a signed 1040X and (2) have consented to import Federal Tax Information directly from the IRS or submitted and IRS tax transcript or submitted a copy of my signed 2023 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 signed 2023 income tax return and applicable schedules and an IRS 4674C letter or a signed, dated statement indicating the IRS is aware of the tax related identity theft.

#### **2023 NON-TAX FILERS**

- ☐ I was employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form, or an equivalent document is provided. [Provide copies of all 2023 IRS W-2 forms issued by the 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 2023 Income

- ☐ I was not employed and had no income earned from work in 2023.

I certify that I have not filed and am not required to file a 2023 income tax return, as well as the sources of 2023 income earned from work and the amount of income from each source.

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

### 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 2025-26 academic year.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse’s Signature

\_\_\_\_\_  
Date