### 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 <a href="https://studentaid.gov/h/apply-for-aid/fafsa">https://studentaid.gov/h/apply-for-aid/fafsa</a>
- 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: <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a>

#### <u>OR</u>

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

#### <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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## 2022-2023 Dependent Verification Worksheet

For Priority Processing Submit Form within 15 business days

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	<b>→</b>					
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:						
	<ul><li>(1) Copies of 2020 W-2 forms/1099 Misc. forms AND</li><li>(2) Verification of Non-Filing Letter from the IRS</li></ul>						
	Inc	dividual'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.

- (1) Complete the IRS Data Retrieval Tool on the FAFSA application OR
- (2) Submit a copy of the signed 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) 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.

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

Please chec	k the a	ppropriate box and	submit the requested do	ocuments.				
2020 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 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with my UIN on all pages.							
2020 TAX F	FILER	S with special ci	rcumstances					
		I filed a 2020 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 2020 IRS Federal Tax Return including IRS Schedules 1, 2, and 3.						
			turn and have submitted that d to US dollars, along with wa					
			elated identity theft and have r script for 2020 and a signed, c eft.					
2020 NON-T	AX FI	LERS						
		Tax Return Per the IF	m work in 2020, but I did not a RS. All income sources/amou pies of 2020 W-2 forms/1099	ints are liste	d below.	IRS Federal		
	lı	ndividual's Name	Name of Employer	Amo	Amount of 2020 Income			
Section E	☐ – Stu	I did not earn income IRS Federal Tax Retu	•	t and was no	ot required to file a 202	2:0		
of Financial Assi of Education. Ad	stance no	otices a discrepancy, I/we	nformation reported on this works a understand corrections to my F y such corrections may also war	AFSA will be	submitted directly to the	U.S. Department		
Student Signatu	ıre	Date	Parent's Signature		Date			
processing, plea	ase revie	ew to make sure that eve	signature or signed electronica ery question has been answerd uments to Enterprise Self-Serv	ed and that y	you have provided all a	dditional		
ENT	 ΓER Y(	OUR UIN -		T		$\Box$		

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