#### UNIVERSITY OF ILLINOIS AT CHICAGO – Office of Student Financial Aid and Scholarships

1200 W. Harrison Street, M/C 334 -- Chicago, Illinois 60607-7163 -- Phone: (312) 996-3126 Website: https://financialaid.uic.edu/

### 2021-2022 Dependent Verification Worksheet Instructions

Fall/Spring Students: Form Submission Deadline is August 1, 2021

Spring Only Students: Form Submission Deadline is November 1, 2021

\*\*This form is available in Spanish. Please see our website to access the form.\*\*

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) Submit Tax Information or Verification of Non-Filing Status to Student Financial Aid and Scholarships for parent and student
- (3) Include your University ID Number (UIN) on every page of your tax documents

### Complete the VERIFICATION WORKSHEET

- SIGN the form with handwritten signatures (no electronic signatures)
- Answer ALL questions

### 2019 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 signed copy of the IRS Federal Tax Return including IRS Schedules 1, 2, and 3
- Include UIN on all pages of signed tax return

# **2019 Non-Tax Filers**

#### **Parents**

# VERIFICATION OF NON-FILING LETTER From the IRS

- Contact the IRS at: https://www.irs.gov/individuals/get-transcript
- Mail or Fax <u>Form 4506-T</u> to the IRS https://www.irs.gov/pub/irs-pdf/f4506t.pdf
- Call the IRS local office at 844-545-5640 to pick up letter at 230 S. Dearborn St., Chicago
- Submit the Verification of Non-Filing Letter received from the IRS – include UIN
- Submit all 2019 W-2 and 1099 forms include UIN

#### **2019 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 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 OR complete the IRS Data Retrieval Tool
- A signed copy of the 2019 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 2019 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 2019
- 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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# 2021-2022 Dependent Verification Worksheet

Fall/Spring Students: Form Submission Deadline is August 1, 2021

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Section A – Student Information (Please print clear
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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, 2021 and June 30, 2022 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, 2021 and June 30, 2022**

#### 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**, **2021 and June 30**, **2022**, in a program that leads to a college degree/certificate. If the household member's college is UIC, write their University Identification Number (UIN) in the box along with UIC listed as the college.

Full Name	Age	Relationship	College	Expected College Graduation (Month and Year)
		Self	UIC	

ENTER YOU	IR 9-DIGIT UIN 🦰	<b>→</b>					
2122	DPVR-E	N					

# 2021-2022 Dependent Verification Worksheet

## **Section C – Parent Income Information**

Your parents MUST provide official 2019 federal tax information to Student Financial Aid and Scholarships. 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 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS OR
- For those who did not file a 2019 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 the appropriate box and submit the requested documents.

2019 TAX	<b>FILERS</b>
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2019 TAX FI	<u>LERS</u>								
		I have successfully link	ed the IRS Data Retrieval Tool to the	e FAFSA.					
		I have attached a copy sent to the IRS with the	of my signed 2019 IRS Federal Tax student's UIN on all pages.	Return including IRS Schedules 1, 2, and	3				
2019 TAX FI	LERS	with special circu	<u>ımstances</u>						
		I filed a 2019 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 2019 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 2019 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.							
2019 NON-T	AX FIL	<u>ERS</u>							
	I did earn income from work in 2019, but I did not and was not required to file a 2019 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.  *****    have attached:   Copies of 2019 W-2 forms/1099 Misc. forms AND   Verification of Non-Filing Letter from the IRS								
	In	dividual's Name	Name of Employer	Amount of 2019 Income					
		Tax Return per the IRS		ns not required to file a 2019 IRS Federal					

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You MUST provide official 2019 federal tax information to Student Financial Aid and Scholarships.

- Complete the IRS Data Retrieval Tool on the FAFSA application **OR**
- Submit a copy of the signed 2019 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS OR
- For those who did not file a 2019 IRS Federal Tax Return, submit a copy of all W-2/1099 forms if wages were earned.

	appropriate box and su	ubmit the requested do	ocuments.					
2019 TAX FIL	<u>ERS</u>							
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	I have attached a the IRS with my U	copy of my signed 2019 JIN on all pages.	IRS Federal Tax	Return including IRS	Schedules 1, 2, and	3 sent to		
2019 TAX FIL	ERS with special o	<u>circumstances</u>						
	the FAFSA IRS D	I filed a 2019 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 2019 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.						
		ax related identity theft ar ranscript for 2019 and a				x related		
2019 NON-TA	X FILERS							
	Tax Return per th	from work in 2019, but I ne IRS. All income sourc ed: Copies of 2019 W-2	es/amounts are li	sted below.	019 IRS Federal			
	Individual's Name	Name of E	Name of Employer		9 Income			
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		ome from wages in 2019.	I did not and wa	s not required to file a	a 2019 IRS Federal			
Continu E C	Tax Return per th							
By signing this work	tudent and Parent ksheet, I/we certify that all	Signatures I the information reported						
By signing this work Financial Aid and S Department of Educ	tudent and Parent	Signatures I the information reported crepancy, I/we understard understand that any such	d corrections to r	ny FAFSA will be sub	mitted directly to the l	J.S.		
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