

UNIVERSITY OF ILLINOIS 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/>



2023-2024 Dependent Verification Worksheet Instructions

Fall/Spring Students: Form Submission Deadline is August 1, 2023

Spring Only Students: Form Submission Deadline is November 1, 2023

**** Please see our website to access this form in Spanish****

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

- (1) Complete the Verification Worksheet
- (2) Submit tax information for parent and student
- (3) Submit Verification of Non-Filing Status for parent if applicable
- (4) Include your University ID Number (UIN) on every page submitted

Complete the VERIFICATION WORKSHEET

- Provide handwritten signatures (no electronic signatures)
- Answer **ALL** questions

2021 TAX FILERS

Parents and Students

**IRS DATA RETRIEVAL TOOL (DRT)
(Preferred Method)**

- Sign in to <https://studentaid.gov/h/apply-for-aid/fafsa>
- Select parent/student finances page
- Select "Link to IRS" and follow prompts
- 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

2021 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 *Form 4506-T* 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
- Submit all 2021 W-2 and 1099 forms

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 submit the IRS Data Retrieval Tool
- 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 victims and the IRS is aware of their tax-related identity theft

2023-2024 Dependent Verification Worksheet

Section C – Parent Income Information

Each parent listed on the FAFSA and in the Household Information section must provide official 2021 federal tax information.

- (1) Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application **OR**
- (2) Submit a copy of the signed IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) Those who did not file a 2021 IRS Federal Tax Return must submit a Verification of Non-Filing letter from the IRS **and** a copy of all W-2/1099 forms if applicable.

Please check the appropriate box and submit the requested documents. ONLY **one** box should be checked on this page.

2021 TAX FILERS

- 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 with the student's UIN on all pages.

2021 TAX FILERS with special circumstances

- 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 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 theft.

2021 NON-TAX FILERS

- I earned income from work in 2021, but I did not and was not required to file an IRS Federal Tax Return. 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**

Individual's Name	Name of Employer	Amount of 2021 Income

- I did not earn income from wages in 2021 and was not required to file an IRS Federal Tax Return.
****** A Verification of Non-Filing Letter from the IRS is attached.**

ENTER YOUR UIN →

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Section D – Student Income Information

You MUST provide official 2021 federal tax information.

- (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 students who did not file a 2021 IRS Federal Tax Return, submit a copy of all W-2/1099 forms if wages were earned.

Please check the appropriate box and submit the requested documents. ONLY **one** box should be checked on this page.

2021 TAX FILERS

- 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 with my UIN on all pages.

2021 TAX FILERS with special circumstances

- 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 identity theft.

2021 NON-TAX FILERS

- I earned income from work in 2021, but I did not and was not required to file a 2021 IRS Federal Tax Return. All income sources/amounts are listed below.
******I have attached:** Copies of 2021 W-2 forms/1099 Misc. forms

Individual's Name	Name of Employer	Amount of 2021 Income

- I did not earn income from wages in 2021 and was not required to file a 2021 IRS Federal Tax Return.

Section E – Student and Parent Signatures

By signing this worksheet, I/we certify that all the information reported on is correct to the best of our knowledge. If Student Financial Aid and Scholarships 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 warrant an adjustment to financial aid that has already been offered for the 2023-24 academic year.

Student Signature

Date

Parent's Signature

Date

IMPORTANT: To avoid processing delays, answer EVERY question and provide all requested documents. Submit all documents together in person, by fax, via mail at: UIC Student Financial Aid and Scholarships, 1200 W. Harrison St., M/C 334, Chicago, IL 60607-7163, or via UIC Portal upload under Financial Aid Requirements.

ENTER YOUR UIN →

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