#### **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



# 2023-2024 Health Professions Verification Worksheet Instructions

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 requested by July 1st
- (2) Submit Tax information or Verification of Non-Filing Status Letter for parent, student, and spouse
- (3) Include student University ID Number (UIN) on every page

### Complete the VERIFICATION WORKSHEET

- SIGN the form with handwritten signatures (no electronic signatures)
- Answer ALL Questions
- Complete and Submit by JULY 1, 2023

#### **2021 TAX FILERS**

# Parents, Students, and Spouse

# 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

#### **2021 Non-Tax Filers**

# Parents, Students, and Spouse 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
- Submit the Verification of Non-Filing Letter received from the IRS – include UIN
- Submit all 2021 W-2 forms and 1099 forms

TURN

# **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 Schedules 1, 2, and 3 OR complete the IRS Data Retrieval Tool
- Signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return."

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 all filers) indicating the individuals were a victim(s) of identity theft
  and the IRS is aware of the theft.

OR

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# 2023-2024 Health Professions Verification Worksheet

Section A – Student Information (Please print clearly)							
Last Name	First Name	M.I.	Phone Number				
Section B – Hou	usehold Information (F	Please instructions be	elow 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(s) and/or step-parent if married according to FAFSA guidelines
- (3) your parents' other children if:
  - (a) your parent(s) will provide more than half of their support between July 1, 2023 and June 30, 2024 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 do so between July 1, 2023 and June 30, 2024

#### 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 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, 2023 and June 30, 2024**, in a program that leads to a degree/certificate. If a household member's college is UIC, write their University Identification Number (UIN) in the box with UIC listed as the college.

Full Name	Age	Relationship	College	Expected College Graduation (Month and Year)			
		Self	UIC				
		Parent	N/A	N/A			

ENTER YC	OUR 9-DIGIT UIN	$\rightarrow$					
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#### 2023-2024 Health Professions 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 <u>Verification of Non-Filing letter</u> 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.

<u> </u>	IAX	FIL	<u>EKS</u>

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 identity theft.

# **2021 NON-TAX FILERS**

$\neg$	
	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.
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## \*\*\*\* 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.

ENTER YOUR UIN -



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<sup>\*\*\*\*</sup> A Verification of Non-Filing Letter from the IRS is attached.

# **Section D – Student and Spouse Income Information**

You and your spouse 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 those who did not file a 2021 IRS Federal Tax Return, submit a copy of the <u>Verification of Non-Filing Letter</u> from the IRS and any W-2/1099 forms.

Please check the	he appropriate bo	ox and submit	t the requested doc	uments. ONL	Y <u>one</u> box sh	ould be chec	ked on th	is page.
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Student Signatu		Date		Signature		Date		
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