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 Independent Verification Worksheet Instructions

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

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 your and your spouse's Tax Information or Verification of Non-Filing Status
- (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

2021 Tax Filers

You and your spouse must complete one of the following if taxes were filed in 2021:

IRS DATA RETRIEVAL TOOL (DRT) (Preferred Method)

- Sign into https://studentaid.gov/h/apply-for-aid/fafsa
- Select student finances page
- Select "Link to IRS" and follow 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

2021 Non-Tax Filers

You and your spouse each must obtain a letter from the IRS if taxes were not filed in 2021:

VERIFICATION OF NON-FILING LETTER

- Contact the IRS at: https://www.irs.gov/individuals/get-transcript
- Call the IRS local office at 844-545-5640 to pick up letter at 230 S. Dearborn St., Chicago
- 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 obtained from the IRS – include UIN
- Submit all 2021 W-2 forms 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 complete the IRS Data Retrieval Tool
- A 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 person'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 filers) indicating the individuals were a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft

OR

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 Independent Verification Worksheet

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

Section A - Student	: Information (Please print clearl	у)	,				
	F: (N			n.				
Last Name	First Name	N	l.l.	Phone Number				
Section B - Househ	old Informatio	n (Please read instr	uctions below be	fore completing)				
(4) Oher dependents if: (a) they now live with (b) you provide more July 1, 2023 and Fill out the chart below – Write the names of all house	ed), will provide more n you AND than half of their June 30, 2024. all fields must I sehold members he college for an	than half of their supports support and will continue ce completed. in the space(s) below. y household member l	nue to provide more If you need more sisted, who will be at	2023 and June 30, 2024, e than half of their support between space, attach a separate sheet. tending college at least half-time e or certificate.				
Full Name	Age	Relationship	College	Expected College Graduation (Month and Year)				
		Self	UIC					
ENTER YOUR 9-DIGIT	UIN 🛶							
2324 INVR-E	N							

2023-2024 Independent Verification Worksheet

Section C – Student Income Information

You MUST provide official 2021 federal tax information to Student Financial Aid and Scholarships.

- Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application **OR** 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 Verification of Non-Filing Letter from the IRS and if wages were earned, all W-2/1099 forms.

ONLY <u>one (1) box</u> should be checked <u>on this page.</u>
Please check the appropriate box and submit the requested documents.

		4									
2021TAX FILERS											
	I have successfully link	ed the IRS Data Retrieval Too	I to the FAFSA.								
	I have attached a copy and 3 sent to the IRS w	of my signed 2021 IRS Federa vith my UIN on all pages.	al Tax Return including IRS Sc	hedules 1, 2,							
2021 TAX FILERS	with special circumst	<u>ances</u>									
	completed the FAFSA	tax return and have submitted IRS Data Retrieval Tool or sub cluding IRS Schedules 1, 2, and	mitted a copy of my signed 202								
		rn and have submitted that reto s, along with wage statements.		d Taxes Paid							
		ated identity theft and have noti ript for 2021 and a signed, date t.									
2021 NON-TAX FI	<u>LERS</u>										
	Tax Return per the IR ***** I have attached: (1) Copies of 2021 W	I did earn income from work in 2021, but I did not and was not required to file a 2021 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below. **** have attached: Copies of 2021 W-2 forms/1099 Misc. forms AND Werification of Non-Filing Letter from the IRS									
	Individual's Name	Name of Employer	Amount of 2021 Income	7							
				-							
		from wages in 2021. I did not a S. I have attached a Verifica									
ENTER	YOUR UIN										

Page 2 of 3

Section D – Student's Spouse Income Information

You MUST provide official 2021 federal tax information to Student Financial Aid and Scholarships.

- (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 Verification of Non-Filing Letter from the IRS and if wages were earned, all W-2/1099 forms.

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

Please check the appropriate box and submit the requested documents.

2	0	2	1	T	Ά	()	(F		L	Е	R	S	
---	---	---	---	---	---	----	---	---	--	---	---	---	---	--

FILERS with special circumstances									
	I have attached a copy of my signed 2021 IRS Federal Tax Return including IRS Schedules 1, 2 and 3 sent to the IRS with the student's UIN on all pages.								
	I have successfully linked the IRS Data Retrieval Tool to the FAFSA.								

2021 TAX F

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 tax related identity theft.

2021 NON-TAX FILERS

I did earn income from work in 2021, but I did not and was not required to file a 2021 IRS Federal
Tax Return per the IRS. 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
Ī			

I did not earn income from wages in 2021. I did not and was not required to file a 2021 IRS Federal Tax Return per the IRS. I have attached a Verification of Non-Filing letter from the IRS.

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 UIC 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 also warrant an adjustment to any financial aid that has already been offered for the 2023-24 academic year.

Student Signature	Date			Spous	se Signa	ature (if	marrie	d)	Date	
IMPORTANT: To avoid a delay in processing, please review to make sure that every question has been answered and that you have provided all additional documents per the instructions. Submit all documents at the same time. Signatures cannot be typed or stamped- must be ink signatures.										
ENTER YOUR	R UIN -									

Page 3 of 3