

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

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Website: <https://financialaid.uic.edu/>

2020-2021 Independent Verification Worksheet Instructions

Form Submission Deadline is August 1, 2020

****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

2018 Tax Filers

You and your spouse must complete one of the following if taxes were filed in 2018:

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

- Sign into <https://studentaid.ed.gov/sa/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

OR

2018 Non-Tax Filers

You and your spouse each must obtain a letter from the IRS if taxes were not filed in 2018:

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 *Form 4506-T* 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 2018 W-2 forms and 1099 forms

2018 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 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 OR complete the IRS Data Retrieval Tool
- A signed copy of the 2018 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 2018 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 2018
- 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

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Section C – Student Income Information

You MUST provide official 2018 federal tax information to Student Financial Aid and Scholarships.

- (1) Complete the IRS Data Retrieval Tool (DRT) on the FAFSA application **OR**
- (2) Submit a copy of the signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2018 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.

2018 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with my UIN on all pages.

2018 TAX FILERS with special circumstances

- I filed a 2018 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 2018 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 2018 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

2018 NON-TAX FILERS

- I did earn income from work in 2018, but I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.
******I have attached:**
(1) Copies of 2018 W-2 forms/1099 Misc. forms AND
(2) **Verification of Non-Filing Letter from the IRS**

Individual's Name	Name of Employer	Amount of 2018 Income

- I did not earn income from wages in 2018. I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS. **I have attached a Verification of Non-Filing Letter from the IRS.**

ENTER YOUR UIN →

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Section D – Student’s Spouse Income Information

You MUST provide official 2018 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 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS **OR**
- (3) For those who did not file a 2018 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.

2018 TAX FILERS

- I have successfully linked the IRS Data Retrieval Tool to the FAFSA.
- I have attached a copy of my signed 2018 IRS Federal Tax Return including IRS Schedules 1, 2, and 3 sent to the IRS with the student’s UIN on all pages.

2018 TAX FILERS with special circumstances

- I filed a 2018 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 2018 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 2018 and a signed, dated statement indicating the IRS is aware of the tax related identity theft.

2018 NON-TAX FILERS

- I did earn income from work in 2018, but I did not and was not required to file a 2018 IRS Federal Tax Return per the IRS. All income sources/amounts are listed below.

******I have attached:**

- (1) Copies of 2018 W-2 forms/1099 Misc. forms AND
- (2) **Verification of Non-Filing Letter from the IRS**

Individual’s Name	Name of Employer	Amount of 2018 Income

- I did not earn income from wages in 2018. I did not and was not required to file a 2018 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 2020-21 academic year.

Student Signature

Date

Spouse Signature (if married)

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 UIN →

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