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

2020-2021 Student IRS Data Retrieval Review

Section A – Student Information (Please print clearly)

Last Name First Name M.I. Phone Number

Section B – Family Income Information

The data transferred from the IRS appears inconsistent with other information reported on the FAFSA.

1. Indicate the dollar amount of income you received for each source below for 2018. **Enter zero (0) if no funds were received.**
2. **Submit the following: 1. 2018 W-2/1099 form(s) and 2. Your signed 2018 IRS Federal Tax Return with Schedules 1, 2, and 3.**

Calendar Year 2018 (January 1, 2018 - December 31, 2018)

Indicate wages earned in 2018. *Separate student and spouse's income. Indicate $0 if no income was received in 2018.* ***Submit all 2018 W-2/1099 forms and your signed 2018 IRS Federal Tax Return with Schedules 1, 2, and 3*** $

Grant and Scholarship Aid. Only include taxable portions of grants *(for example, Federal Pell, State MAP are not taxable grants and should not be included). Submit your signed 2018 IRS Federal Tax Return with Schedules 1, 2, and 3* $

Child support **PAID**. *If the amount is greater than $0, you will also need to submit a signed statement certifying the following: 1) Total amount paid in 2018, 2) The name of the person to whom, and (3) For whom the support was paid* $

Need Based Employment *(such as Federal Work Study) - Submit 2018 W-2 forms* $

Combat Pay or Co-op Earnings - *Submit 2018 W-2 forms* $

Untaxed Income

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H, and S. **Don't include amounts reported in code DD.** *Submit 2018 W-2 forms* $

Rollover Pension Amount - *Submit 2018 1099 form indicating this is a Rollover* $

Child support **RECEIVED** for any of your children. **Don't include** foster care or adoption payments. $

Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing. $

Veteran's non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances. $

Other untaxed income such as workers' compensation, disability, untaxed foreign income, health savings accounts, etc. **Don't include** extended foster care benefits, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, WIOA educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements, foreign income exclusion, or credit for federal tax on special fuels. $

Other money received, or paid on your behalf, not reported elsewhere on this form (exclude support from parents). For example, a friend or relative is helping pay your bills. $

Section C – 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 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 2020-2021 academic year.

Student Signature **Date** **Spouse's Signature** **Date**

ENTER YOUR 9-DIGIT **UIN** →

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