

UNIVERSITY OF ILLINOIS AT CHICAGO – Office of Student Financial Aid

1200 W. Harrison St., M/C 334 - Chicago, IL 60607-7163 - Phone: (312) 996-3126 Document Fax Line: (312) 996-3385

2018-2019 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 Verify Non-Tax Filing status to OSFA for parent and student

Complete the VERIFICATION WORKSHEET

- SIGN the form with handwritten signatures (no electronic signatures)
- Answer **ALL** Questions
- **Complete and Submit by JULY 1, 2018**

2016 TAX FILERS

Parents and Students

IRS DATA RETRIEVAL TOOL (DRT) (Preferred Method)

- Sign into <https://www.fafsa.ed.gov>
- Select parent/student finances page
- Select “Link to IRS” and complete steps with IRS
- Data will show as “Transferred from the IRS”

OR

IRS TAX RETURN TRANSCRIPT

- Contact the IRS to obtain a 2016 Tax Return Transcript at <https://www.irs.gov/individuals/get-transcript> - can take up to 6 weeks to receive
- Submit copies of all 2016 W-2 and 1099 forms

2016 NON-TAX FILER

Parents and Students **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>
- Submit the Verification Letter of Non-Filing received from the IRS
- Submit all 2016 W-2 forms and 1099 forms

2016 UNUSUAL TAX FILING SITUATIONS

Individuals who fall into one of the IRS Tax categories below must submit the listed information.

AMENDED TAX FILERS:

- 2016 IRS Tax Return Transcript from the IRS with W-2 forms OR complete the IRS DRT
- A signed copy of the 2016 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 2016 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 2016
- Signed and dated statement (by all filers) indicating the individuals were a victim of IRS tax-related identity theft and the IRS is aware of the tax-related identity theft.

2018-2019 Health Professions Verification Worksheet

Section C – Student and Parent Income Information

You and your parents MUST check the method below in which you are providing your official federal tax information to the Office of Student Financial Aid. Please **check the appropriate box** and **submit the requested documents**.

(Student and Parent should select only one box per column)

2016 TAX FILERS

STUDENT

PARENT

- | | | |
|--------------------------|--|--------------------------|
| <input type="checkbox"/> | A. I Already Completed the FAFSA IRS Data Retrieval Tool Process | <input type="checkbox"/> |
| <input type="checkbox"/> | B. I have attached my 2016 Tax Return Transcript and W-2/1099 Forms | <input type="checkbox"/> |
| <input type="checkbox"/> | C. I filed a 2016 amended tax return, filed a foreign tax return, or cannot obtain a tax transcript due to IRS Identity Theft. I have provided the necessary documentation per the instructions (1040X form, foreign return, etc.) | <input type="checkbox"/> |

2016 NON TAX FILERS

STUDENT

PARENT

- | | | |
|--------------------------|--|--------------------------|
| <input type="checkbox"/> | D. I did earn income from work in 2016. I did not and was not required to file a 2016 Federal Income Tax Return per the IRS. All income sources/amounts are listed below and 2016 W-2 form(s) and 1099 Misc. forms are attached.
A Verification of Non-Filing Letter from the IRS is attached. | <input type="checkbox"/> |
|--------------------------|--|--------------------------|

Individual's Name	Name of Employer	Amount of 2016 Income

- | | | |
|--------------------------|--|--------------------------|
| <input type="checkbox"/> | E. I did not earn any income in 2016. I did not and was not required to file a 2016 Federal Income Tax Return per the IRS regulations.
A Verification Letter of Non-Filing from the IRS is attached. | <input type="checkbox"/> |
|--------------------------|--|--------------------------|

Section D – Student and Parent 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 the UIC Office of Student Financial Aid 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 2018-19 academic year.

Student Signature

Date

Parent's Signature

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!**

ENTER YOUR UIN →

--	--	--	--	--	--	--	--	--	--