

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 Independent 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 as requested
- (2) Submit Your and your spouse's tax information or Verify Non-Filing Status

Complete the VERIFICATION WORKSHEET

- SIGN the form with handwritten signatures (no electronic signatures)
- Answer **ALL** Questions
- Include proof of IL residency

2016 Tax Return Filed

You and your spouse must complete one of the following if taxes were filed in 2016:

IRS DATA RETRIEVAL TOOL (DRT)

- Sign into <https://www.fafsa.ed.gov>
- Select 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> (this can take up to 6 weeks to receive)
- Submit copies of 2016 W-2 and 1099 forms

OR

2016 Non-Tax Filer

You and your spouse each must obtain a letter from the IRS if taxes were not filed in 2016:

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
- 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 person'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 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.

2018-2019 Independent Verification Worksheet

Section C – Student and Spouse Income Information

1. You and your spouse **MUST** check the method below in which you are providing your official 2016 federal tax information to the Office of Student Financial Aid. **Please check the appropriate box** and submit the requested documents.
(Student and Spouse, if applicable, should select only one box per column)

2016 TAX FILERS

STUDENT

SPOUSE

- | | | |
|--------------------------|--|--------------------------|
| <input type="checkbox"/> | A. I have attached my 2016 Tax Return Transcript and W-2/1099 forms | <input type="checkbox"/> |
| <input type="checkbox"/> | B. I have successfully linked the IRS Data Retrieval Tool to the FAFSA | <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, foreign return, etc) | <input type="checkbox"/> |

2016 NON TAX FILERS

STUDENT

SPOUSE

- | | | |
|--------------------------|---|--------------------------|
| <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. Must submit a Verification of Non-Filing form from the IRS. | <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. Must submit a Verification Letter of Non-Filing from the IRS. | <input type="checkbox"/> |
|--------------------------|---|--------------------------|

2. If you are an undergraduate student and a resident of Illinois, **you must submit documents verifying that you have resided in Illinois for 12 continuous full months immediately prior to the start of the academic year.**

You are an Illinois Resident and **ONE** of the following residency documentation from 8/26/17-8/27/18 is attached:

- | | |
|--|--|
| <input type="checkbox"/> Valid Illinois driver's license or State of IL Identification Card
<input type="checkbox"/> Illinois voter's registration card
<input type="checkbox"/> Rent or utility bills in the student's name (every month required)
<input type="checkbox"/> Residential lease in student's name
<input type="checkbox"/> Illinois high school or college transcript | <input type="checkbox"/> Illinois auto registration card
<input type="checkbox"/> Property tax bill
<input type="checkbox"/> You do not reside in Illinois
<input type="checkbox"/> I cannot provide proof of IL residency prior to 8/27/2017 |
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Section D – 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 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	Spouse Signature (if married)	Date
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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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