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

---

**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 A – Student Information (Please print clearly)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Street Address</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section B – Family Information (Please read instructions below before completing)

Please list the people in your household, including:
- yourself, and your spouse (if married),
- your children, if you will provide more than half of their support between July 1, 2018 and June 30, 2019, and
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support between July 1, 2018 and June 30, 2019.

Write the names of all household members in the space(s) below. If you need more space, attach a separate sheet. Also, write in the name of the college for any household member listed, who will be attending college at least half-time between July 1, 2018 and June 30, 2019, in a program that leads to a college degree or certificate.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
<th>Expected Graduation (Month and Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Self</td>
<td>UIC</td>
<td></td>
</tr>
</tbody>
</table>

ENTER YOUR 9-DIGIT UIN

1819 INVR-O N
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)

<table>
<thead>
<tr>
<th></th>
<th>STUDENT</th>
<th>SPOUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 TAX FILERS</td>
<td>☐ A. I have attached my 2016 Tax Return Transcript and W-2/1099 forms</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>☐ B. I have successfully linked the IRS Data Retrieval Tool to the FAFSA</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>☐ 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)</td>
<td>☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>STUDENT</th>
<th>SPOUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 NON TAX FILERS</td>
<td>☐ 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.</td>
<td>☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Individual's Name</th>
<th>Name of Employer</th>
<th>Amount of 2016 Income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| ☐ 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. | ☐                                                                 |

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:

- ☐ Valid Illinois driver’s license or State of IL Identification Card
- ☐ Illinois voter’s registration card
- ☐ Rent or utility bills in the student’s name (every month required)
- ☐ Residential lease in student’s name
- ☐ Illinois high school or college transcript

- ☐ Illinois auto registration card
- ☐ Property tax bill
- ☐ You do not reside in Illinois
- ☐ I cannot provide proof of IL residency prior to 8/27/2017

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
--- | --- | --- | ---

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.