



2023-2024
Standard Verification Worksheet
Independent Student

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Your 2023-2024 FAFSA was selected for verification by the Dept. of Education, which requires us to confirm or correct the current household size and 2021 tax data reported on your FAFSA. You are required to complete the verification process in order to receive financial aid. Please respond with all requested documentation within 14 days. More information available at www.uiw.edu/finaid.

Student Name _____ Student ID _____ Student Phone Number (include area code) _____

STEP 1: FAMILY INFORMATION – attach a separate sheet, if necessary.

- List your spouse, and the people who live with you and for whom you provide **more** than 50% of their support, **and children** who you provide **more** than 50% of their support.
- Include the name of the college for any household member who is or will be enrolled at least half-time (6+ hours) for 2023-2024.

Full Name	Age	Relationship to Student	Name of College (if applicable)	Enrolled 6+ Hours?
				<input type="checkbox"/> YES <input type="checkbox"/> NO or N/A
				<input type="checkbox"/> YES <input type="checkbox"/> NO or N/A
				<input type="checkbox"/> YES <input type="checkbox"/> NO or N/A
				<input type="checkbox"/> YES <input type="checkbox"/> NO or N/A
				<input type="checkbox"/> YES <input type="checkbox"/> NO or N/A

STEP 2: STUDENT’S AND/OR SPOUSE’S 2021 TAX FILING STATUS – Refer to page 2 for instructions on transferring tax information to the FAFSA, requesting an IRS Tax Return Transcript, and/or requesting a Verification of Non-Filing Letter.

Did you (and/or your spouse, if applicable) file, or were you required to file a 2021 U.S. Federal Income Tax Return?

- Yes.** Transfer tax information into FAFSA or submit a SIGNED copy of your 2021 Tax Return.
 - o If you were not married in 2021, but are now married, both tax returns are still required.
 - o If you were married in 2021, but are now separated or divorced, please submit the Student Marital Status form and accompanying documentation to have your income adjusted on the FAFSA.
- No, but I/we earned income in 2021.** Submit copies of 2021 W2(s) and/or 1099(s) provided by your employer **and** a *Verification of Non-Filing Letter* for 2021 from the IRS.
- No, and I/we had no 2021 income.** Submit a *Verification of Non-Filing Letter* for 2021 from the IRS.

STEP 3: STUDENT’S AND/OR SPOUSE’S WORK-STUDY EARNINGS

Did you, (and/or your spouse, if applicable), have any earnings from work-study during 2021?

- Yes.** Submit copies of work-study W2(s) from 2021.
- No.**

STEP 4: STUDENT’S AND/OR SPOUSE’S RETIREMENT DISTRIBUTIONS

Did you, (and/or your spouse, if applicable), receive a coronavirus-related distribution from a retirement plan in 2021?

- Yes.** Submit IRS Form 1099-R or a Wage and Income Statement from the IRS.
- No.**

STEP 5: CERTIFICATION AND SIGNATURES

I certify that all information reported on this worksheet is complete and accurate. I understand if I purposely give false or misleading information on this worksheet, I may be fined, sentenced to jail, or both.

 Student Signature (Required)

 Date (Required)

Please note: The Office of Financial Assistance may request additional information or documents in order to complete verification.

Refer to the instructions below to transfer your/your parent(s)' tax information directly into the FAFSA, request a Tax Return Transcript, or request a Verification of Non-filing Letter from the IRS. Special situations which may require additional documentation are listed below.

Transferring Tax Information into the FAFSA

- Log into your FAFSA at <http://www.fafsa.ed.gov>.
- Choose the 2023-2024 FAFSA and click on **Make FAFSA Corrections**.
- Navigate to **Financial Information** and follow the prompts to link to the IRS.
- Check the box to transfer the information and click on **Transfer Now**, or the information will not be imported.
- Be sure to **submit** the updates to your FAFSA before logging off.
- Revised FAFSA results will be received by the Office of Financial Assistance in 5-10 business days.
- If the data received after transferring your tax information into the FAFSA indicates that you/your spouse amended your tax return, a signed copy of the 1040X will be required. In some cases, the changes were made directly by the IRS, and you/your spouse will have a letter from the IRS indicating this change.

Requesting a Tax Return Transcript from the IRS

- Go to <http://www.irs.gov> and click on **Get Your Tax Record**.
- Click on **Get Transcript by Mail**, and follow the prompts using the primary tax-payer's information.
- Choose **Tax Return Transcript** as the requested form, and **2021** as the tax year. **Enter your student ID number in the Customer File Number box**. The transcript will be mailed to the address on the tax return. We are unable to accept an "Account Transcript," as it does not contain all the required information.
- Repeat the process for your spouse, if necessary.
- If you or your spouse amended the 2021 tax return, a signed copy of the 1040X will be required. In some cases, the changes were made directly by the IRS, and you/your spouse will have a letter from the IRS indicating this change.

Requesting a Verification of Non-Filing Letter from the IRS

- Download IRS form 4506T-EZ from <http://www.irs.gov>
- Fill in items 1-4 and **enter your student ID number in box 5b, Customer File Number**.
- Check Box 7, and enter **12/31/2021** in Box 9.
- Mail or fax the completed form to the address/number indicated in the 4506T instructions.
- If you/your spouse worked in 2021, you must also submit copies of all sources of income.
 - Income documents may include: W2s, 1099s, Social Security/Disability statements, Interest Income, etc.
- The letter will be mailed to the address on the 4506T within 5-10 business days.

Requesting a Wage and Income Statement from the IRS

- Go to <http://www.irs.gov> and click on **Get Your Tax Record**.
- Click on **Get Transcript by Mail**, and follow the prompts using the primary tax-payer's information.
- Choose **Wage and Income Statement** as the requested form, and **2021** as the tax year. **Enter your student ID number in the Customer File Number box**. The transcript will be mailed to the address on the tax return.
- Repeat the process for your spouse, if necessary.

Special Situations (may require additional documentation):

- If you are separated but not divorced, you may still be required to provide tax information for your spouse.
- If you are married but filed taxes separately, you cannot transfer your information into the FAFSA. You will both need to request a Tax Return Transcript and turn in a copy.
- If you were married and filed a joint return in 2021, and we are unable to accurately split you and your spouse's income, you will both need to submit copies of all your 2021 W2s.
- If you were married and filed a joint return in 2021, but are now divorced, you may submit a Student Marital Status form and a **Wage and Income statement** from the IRS to remove your ex-spouse's income from the FAFSA.