



2022-2023

Standard Verification Worksheet

Dependent Student

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FVWD03

Your 2022-2023 FAFSA was selected for verification by the Dept. of Education, which requires our office to confirm or correct the current household size and 2020 tax information reported on your FAFSA. You are required to complete the verification process in order to receive financial aid. Please submit all requested documentation within 14 business days. For more information, please visit www.uiw.edu/finaid.

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

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

- List your **parent(s), step-parent** and individuals who live with and receive **more** than 50% of their support from your parent(s).
- List child(ren) of the same parent(s) who receive **more** than 50% of their support from them.
- Include the name of the college for any household member who is or will be enrolled at least half-time (6+ hours) for 2022-2023.

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 2020 TAX FILING STATUS – Refer to page 2 for instructions on transferring tax information into the FAFSA and requesting IRS documents such as a Tax Return Transcript.

- A. Did you file, or were you required to file, a 2020 U.S. Federal Income Tax Return?
- Yes.** Transfer tax information to the FAFSA or submit a SIGNED copy of your 2020 Tax Return.
 - No, but I earned income in 2020.** Submit copies of 2020 W2(s) and/or 1099(s) provided by your employer.
 - No, I had no 2020 earned income.** Skip Question B and proceed to provide your signature.
- B. Did you earn income from work-study during 2020?
- Yes.** Submit copies of 2020 W2(s) from work-study earnings.
 - No**

Student Certification and Signature: 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)**

STEP 3: PARENT(S) 2020 TAX FILING STATUS – Refer to page 2 for instructions on transferring tax information into the FAFSA and requesting IRS documents such as a Tax Return Transcript or a Verification of Non-filing Letter.

- A: Did your parent(s) file, or were they required to file, a 2020 U.S. Federal Income Tax Return?
- Yes.** Transfer tax information to the FAFSA or submit a SIGNED copy of their 2020 Tax Return.
 - No, but they earned income in 2020.** Submit copies of all 2020 earned income documents (W2s, 1099s, etc.) **and a Verification of Non-Filing Letter** for 2020 from the IRS.
 - No, but they did file a foreign tax return.** Submit signed *original* and *translated* copies of foreign tax return, with amounts converted to USD and showing total earned, adjusted gross income, and taxes paid.
 - No, they had no 2020 earned income.** Submit a *Verification of Non-Filing Letter* for 2020 from the IRS.
- B: Did your parent(s) receive a coronavirus-related distribution from a retirement plan in 2020?
- Yes.** Submit IRS Form 1099-R or a Wage and Income Statement from the IRS.
 - No.**

Parent Certification and Signature: 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.

_____ **Parent Signature (Required)** _____ **Date (Required)**

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 2022-2023 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.
- Repeat the process for the student or parent, as necessary.
- 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 or your parent(s) amended the 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 parent(s) will have a letter from the IRS indicating this change.

Requesting a Tax Return Transcript from the IRS

- If you/your parent are unable to locate a copy of the Tax Return, you may request one 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 **2020** as the tax year. **Enter the student's 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 the student or parent, as necessary.
- If you or your parent(s) amended the 2020 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 parent(s) 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 the student's ID number in box 5b, Customer File Number**.
- Check Box 7 and enter **12/31/2020** in Box 9.
- Mail or fax the completed form to the address/number indicated in the 4506T instructions.
- If your parent(s) worked in 2020, they 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 **2020** 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.

Special Situations (may require additional documentation):

- If your parents are separated but not divorced, they may still both be required to provide tax information.
- If your parents are married but filed taxes separately, you cannot transfer their information into the FAFSA. Both will need to provide signed copies of their returns or request a Tax Return Transcript and turn in a copy.
- Biological/adoptive parents who are unmarried but living together must both provide tax information on the FAFSA as well as Tax Returns for the verification process.
- If your custodial parent is remarried, the step-parent must provide tax information on the FAFSA and will be required to submit a Tax Return for the verification process, if they filed separately.
- If your parents were married and filed a joint return in 2020, but are now divorced, you may submit a Parent Marital Status form and a **Wage and Income statement** from the IRS to remove the non-custodial parent's income from the FAFSA.