

2018-2019 Dependent Verification Worksheet

Your Free Application for Federal Student Aid (FAFSA) was selected by the Department of Education for a review process called verification. During this review, Illinois State University will compare information submitted on your FAFSA to information on this worksheet and other required documentation. Federal regulations require that we complete verification before processing federal financial aid.

If there are differences between information on your FAFSA and this worksheet, we will send corrections to the FAFSA processor. You will receive an acknowledgement reflecting these changes. If we do make corrections, please do **not** make any subsequent changes to your FAFSA data.

Please FAX the completed original form and any supporting documents to: **(309) 438-3755** or mail to: **Financial Aid Office, Campus Box 2320, Normal, IL 61790-2320**. If you have questions about completing this worksheet, call the Illinois State University Financial Aid Office at (309) 438-2231 or e-mail financialaid@IllinoisState.edu.

A. Student Information

| | | | |
|--|------------|------|--|
| Last Name | First Name | M.I. | Student's ISU UID/EMPLID Number |
| Permanent Home Address (include R.R., P.O. Box, or Apt. No.) | | | Date of Birth (MM/DD/YYYY) |
| City | State | ZIP | Student Cell Phone Number (with area code) |

B. Family Information

List all the people in your parent's household. Include:

- The student.
- The parents (including a stepparent).
- The parents' other children **if** the parents will provide more than half of the children's support from July 1, 2018 through June 30, 2019.
- Other people if they currently live with your parents and your parents provide more than one-half of their support and will continue to through June 30, 2019.
- Include the name of the college for anyone (except a parent) who will attend college at least half-time between July 1, 2018 and June 30, 2019, and who will be enrolled in a program leading to a degree, diploma or certificate.

| Full Name | Age | Relationship to Student | College or University |
|-----------------------------|-----|-------------------------|---------------------------|
| <i>(example)</i> Inez Jones | 18 | self | Illinois State University |
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| | | | |

C. Parent's 2016 Income and Federal Tax Information

Choose ONE option only. Please see Instruction Page for further assistance.

- () The parent(s) filed a 2016 Federal Tax Return and has successfully transferred their IRS tax information directly from the IRS to the FAFSA using the IRS Data Retrieval Tool **and** made no changes to that information.
- () The parent(s) filed a 2016 Federal Tax Return and will provide ISU with a 2016 Federal Tax Return Transcript that can be obtained from www.irs.gov. *****If parent(s) filed an amended return (1040X) or have an IRA or Pension rollover you must submit a Federal Tax Return Transcript.**
- () The parent(s) **have not and are not required** to file a 2016 Federal Tax Return **and** had **no** earnings from work in 2016. Parent(s) will provide a Verification of Non-Filing letter(s) that can be obtained from www.irs.gov.
- () The parent(s) **have not and are not required** to file a 2016 Federal Tax Return **but** had some earnings from work in 2016. Parent(s) will provide a Verification of Non-Filing letter that can be obtained from www.irs.gov and copies of all 2016 W2's. Parent(s) will also complete the chart below listing all employers and earnings for 2016. Use a separate sheet if necessary.

| | Employer(s) Name | 2016 Earnings W-2s (box 1) |
|--------------------|--------------------------|----------------------------|
| Parent1/Stepparent | _____ | _____ |
| | _____ | _____ |
| | Parent1/Stepparent Total | _____ |
| Parent2/Stepparent | _____ | _____ |
| | _____ | _____ |
| | Parent2/Stepparent Total | _____ |

D. Student's 2016 Income and Federal Tax Information

Choose ONE option only. Please see Instruction Page for further assistance.

- () The student filed a 2016 Federal Tax Return and has successfully transferred their IRS tax information directly from the IRS to the FAFSA using the IRS Data Retrieval Tool **and** made no changes to that information.
- () The student filed a 2016 Federal Tax Return and will provide ISU with a 2016 Federal Tax Return Transcript that can be obtained from www.irs.gov. *****If you filed an amended return (1040X) or have an IRA or Pension rollover you must submit a Federal Tax Return Transcript.**
- () The student **has not and is not required** to file a 2016 Federal Tax Return **and** had **no** earnings from work in 2016.
- () The student **has not and is not required** to file a 2016 Federal Tax Return **but** had some earnings from work in 2016. Student will provide copies of all 2016 W2's and will also complete the chart below listing all employers and earnings for 2016. Use a separate sheet if necessary.

| | Employer(s) Name | 2016 Earnings W-2s (box 1) |
|---------|------------------|----------------------------|
| Student | _____ | _____ |
| | _____ | _____ |
| | Student Total | _____ |

E. Sign this Worksheet

By signing this worksheet, each of us certifies that all the information reported here to qualify for federal student aid is complete and correct.

Student Name (printed)

Student Signature

Date

Parent Signature

Date

Student ISU ID Number

Parent Cell Phone Number

Dependent Verification Worksheet Instructions

Sections C and D of the Dependent Verification Worksheet requests information about the student and parent(s) 2016 Federal Tax Return. In order to provide that to Illinois State University you will need to use the IRS Data Retrieval Tool on the FAFSA **OR** request a 2016 IRS Tax Return Transcript. Parents that did not file a 2016 Federal Tax Return must provide a Verification of Non-Filing Letter from the IRS and copies of all W2's (if applicable). Students that did not file a 2016 Federal Tax Return must provide copies of all W2's (if applicable). Below you will find directions on how to utilize the IRS Data Retrieval Tool and how to request an IRS Tax Transcript or Verification of Non-Filing Letter.

Using the IRS Data Retrieval Tool

Access your FAFSA at www.fafsa.gov and log into your account. Once logged in, click on the option to "Make FAFSA Corrections" (this will take you to your completed FAFSA information). If federal taxes have been filed, go to the parent tax information section and update status to "already completed" taxes. Answer the series of questions that follow. If you answer "no" to each question an option will be provided to "link to IRS". Enter parent FSA ID and password, click on the IRS link, and you will be taken to the IRS website and asked to enter your information. Enter your name and address information EXACTLY as it appears on your 2016 tax form. If the tool can locate tax information, click the option to "transfer now". If you need to use the IRS Data Tool for the student, repeat steps in the student section of the FAFSA. Once you are done make sure to "next" through the rest of the FAFSA and complete the new submission on the "Sign and Submit" page.

Requesting an IRS Tax Return Transcript

For Tax Return Transcript go to www.irs.gov, click "Get My Tax Record". Then choose "Get Transcript Online" or "Get Transcript by Mail". The "Get Transcript Online" tool is currently unavailable for new users. If you already have an account established, you can log in to access your Tax Return Transcript. To "Get Transcript by Mail" simply choose that option and supply the requested information. Request can also be made by telephone at (800) 908-9946 or by completing a [4506-T](#) that can be mailed or faxed to the IRS. In any case make sure that you request the "IRS Tax Return Transcript" and **NOT** "IRS Account Transcript". The transcripts requested by "Get Transcript by Mail", Phone and 4506-T are generally received within 10 business days from the IRS's receipt of your request.

Verification of Non-Filing Letter

For Verification of Non-filing letter go to www.irs.gov, click "Get My Tax Record". Then choose "Get Transcript online". The "Get Transcript Online" tool is currently unavailable for new users. If you already have an account established, you can log in to access a Verification of Non-filing letter. Request can also be made by telephone at (800) 908-9946 or by completing a [4506-T](#) that can be mailed or faxed to the IRS. Verification of Non-filing letters requested by phone or 4506-T are generally received within 10 business days from the IRS's receipt of your request.