

# 2020

DEPENDENT STUDENT



ILLINOIS STATE UNIVERSITY  
*Illinois' first public university.*

## 2019-2020 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](mailto:financialaid@IllinoisState.edu).

### A. Student Information

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_____	_____	_____	_____
Last Name	First Name	M.I.	Student's ISU ID 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

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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, 2019 through June 30, 2020.
- 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, 2020.
- Include the name of the college for anyone (except a parent) who will attend college at least half-time between July 1, 2019 and June 30, 2020, 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
		self	Illinois State University

### C. Parent's 2017 Income and Federal Tax Information

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

- The parent(s) filed a 2017 Federal Tax Return and have successfully transferred the 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 2017 Federal Tax Return and will provide ISU with a 2017 Federal Tax Return Transcript that can be obtained from [www.irs.gov](http://www.irs.gov).
- The parent(s) **have not and are not required** to file a 2017 Federal Tax Return **and** had **no** earnings from work in 2017. Parent(s) will provide a Verification of Non-filing letter(s) that can be obtained from [www.irs.gov](http://www.irs.gov).
- The parent(s) **have not and are not required** to file a 2017 Federal Tax Return **but** had some earnings from work in 2017. Parent(s) will also provide a Verification of Non-filing letter that can be obtained from [www.irs.gov](http://www.irs.gov) and copies of all W2's. Parent(s) will also complete the chart below listing all employers and earnings for parent(s). Use a separate sheet if necessary.

	Employer(s) Name	2017 Earnings W-2s (box 1)
Parent1/Stepparent	_____	_____
	_____	_____
	Parent1/Stepparent Total	_____
Parent2/Stepparent	_____	_____
	_____	_____
	Parent2/Stepparent Total	_____

### D. Student's 2017 Income and Federal Tax Information

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

- The student filed a 2017 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 2017 Federal Tax Return and will provide ISU with a 2017 Federal Tax Return Transcript that can be obtained from [www.irs.gov](http://www.irs.gov).
- The student **has not and is not required** to file a 2017 Federal Tax Return **and** had **no** earnings from work in 2017.
- The student **has not and is not required** to file a 2017 Federal Tax Return **but** had some earnings from work in 2017. Student will provide copies of all 2017 W2's and will complete the chart below listing all employers and earnings. Use a separate sheet if necessary.

	Employer(s) Name	2017 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) 2017 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 2017 IRS Tax Return Transcript. Parents that did not file a 2017 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 2017 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.studentaid.gov](http://www.studentaid.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 already been filed, you will be able to utilize the IRS DRT once you get to the Financial Information section. First, you must indicate that 2017 taxes were "Already completed", select the tax filing status and answer whether or not a Puerto Rican or foreign tax return was filed for 2017. If you answer "No" then the IRS Data Retrieval Tool will be displayed. Click "link to IRS". In order to complete the IRS DRT for a parent you will need to enter the parents' FSA ID and password, click "Next", then click "Proceed to IRS Site" and you will then be taken to the IRS website and asked to enter their information. Enter their name and address exactly how it appears on the 2017 federal tax return. 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 for the student in the Student Financial Information section. 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](http://www.irs.gov), click "Get My Tax Record". Then choose "Get Transcript Online" or "Get Transcript by Mail". To use the "Get Transcript Online" tool, users must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication. Requests 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. If you already have an account established, you can log in to access your Tax Return Transcript. 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](http://www.irs.gov), click "Get My Tax Record". Then choose "Get Transcript online". You must register with the IRS to use the online service to get the Verification on Non-Filing Letters. To use the "Get Transcript Online" tool, users must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication. If you already have an account established, you can log in to access a Verification of Non-filing letter. Requests 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.