

2023-2024

Standard Verification Worksheet **Dependent Student**

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FVWD04

Your 2023-2024 FAFSA was selected for verification by the Dept. of Education, which requires our office to confirm or correct the current household size and 2021 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	e Number (include area code)
STEP 1: HOUSEHOLD INFORMA			(mornes area cons
 List your parent(s), step-parent and List child(ren) of the same parent(s) v Include the name of the college for an 	people who live with and receive who receive <i>more</i> than 50% of their	more than 50% of their support r support from them.	
Full Name	Age Relationship to Student	Name of College (if applicable)	Enrolled 6+ Hours?
			YES NO or N/A
			YES NO or N/A
			YES NO or N/A
			YES NO or N/A
			YES NO or N/A
STEP 2: STUDENT'S 2021 TAX F the FAFSA and requesting IRS docur			sferring tax information into
A. Did you file, or were you required to file, a 2021 U.S. Federal Income Tax Return?			
Yes. Transfer tax information to the FAFSA or submit a SIGNED copy of your 2021 Tax Return. No, but I earned income in 2021. Submit copies of 2021 W2(s) and/or 1099(s) provided by your employer.			
No, I had no 2021 earned income. Skip Question B and proceed to provide your signature.			
B Did you earn income from work-study during 2021?			
 Yes. Submit copies of 2021 W2(s) from work-study earnings. No 			
Student Certification and Signature I understand if I purposely give false or			
Student Signature (Required)		Date (Required)	
STEP 3: PARENT(S) 2021 TAX FI the FAFSA and requesting IRS docur			
A: Did your parent(s) file, or were they required to file, a 2021 U.S. Federal Income Tax Return?			
☐ Yes. Transfer tax information to the FAFSA or submit a SIGNED copy of their 2021 Tax Return.			
 No, but they earned income in Verification of Non-Filing Letter No, but they did file a foreign 	er for 2021 from the IRS.		
amounts converted to USD and showing total earned, adjusted gross income, and taxes paid.			
No, they had no 2021 earned income. Submit a Verification of Non-Filing Letter for 2021 from the IRS.			
B: Did your parent(s) receive a coronavirus-related distribution from a retirement plan in 2021?			
☐ Yes. Submit IRS Form 1099-R☐ No.	or a Wage and Income Stateme	ent from the IRS.	
Parent Certification and Signature	: I certify that all information rep	orted on this worksheet is con	1 . 1
i anderstand if i purposery give talse of	misleading information on this v		

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.
- o Choose the 2023-2024 FAFSA and click on Make FAFSA Corrections.
- o Navigate to *Financial Information* and follow the prompts to link to the IRS.
- o Check the box to transfer the information and click on *Transfer Now*, or the information will not be imported.
- o Repeat the process for the student or parent, as necessary.
- o Be sure to **submit** the updates to your FAFSA before logging off.
- o Revised FAFSA results will be received by the Office of Financial Assistance in 5-10 business days.
- o 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

- o If you/your parent are unable to locate a copy of the Tax Return, you may request one from the IRS.
- o Go to http://www.irs.gov and click on Get Your Tax Record.
- o 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 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.
- o Repeat the process for the student or parent, as necessary.
- o If you or your parent(s) 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 parent(s) will have a letter from the IRS indicating this change.

Requesting a Verification of Non-Filing Letter from the IRS

- o Download IRS form 4506T-EZ from http://www.irs.gov
- o Fill in items 1-4 and enter the student's ID number in box 5b, Customer File Number.
- o Check Box 7 and enter **12/31/2021** in Box 9.
- o Mail or fax the completed form to the address/number indicated in the 4506T instructions.
- o If your parent(s) worked in 2021, they must also submit copies of all sources of income.
 - o Income documents may include: W2s, 1099s, Social Security/Disability statements, Interest Income, etc.
- o 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

- o Go to http://www.irs.gov and click on Get Your Tax Record.
- o Click on Get Transcript by Mail, and follow the prompts using the primary tax-payer's information.
- O 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.

Special Situations (may require additional documentation):

- o If your parents are separated but not divorced, they may still both be required to provide tax information.
- o 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.
- o 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.
- o If your parents were married and filed a joint return in 2021, 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.