# 2023
**INDEPENDENT STUDENT**

**ILLINOIS STATE UNIVERSITY**
*Illinois' first public university.*

# 2022-2023 Independent 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 review, complete and return this form to document your compliance using one of the following methods.

- Upload the completed original form at: my.illinoisstate.edu
- FAX to: **(309) 438-3755**
- mail to: **Financial Aid Office, Campus Box 2320, Normal, IL 61790-2320**

If you have questions about completing this form, 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 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

**List all the people in your household.  Include:**
- Yourself.
- Spouse if you are married.
- Your dependent children *if* you will provide more than half of their support from July 1, 2022 through June 30, 2023.
- Other people if they currently live with you and you provide more than one-half of their support and will continue to through June 30, 2023.
- Write the name of the college for anyone who will attend college at least half-time between July 1, 2022 and June 30, 2023, and who will be enrolled in a program leading to a degree, diploma or certificate.

| Full Name | Age | Relationship to Student | College or University |
|---|---|---|---|
| (*example*) Inez Jones | 23 | spouse | Illinois State University |
| | | self | Illinois State University |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

## C. Student's (and spouse's) 2020 Income and Federal Tax Information

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

❑ The student (and spouse) filed a 2020 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 (and spouse) filed a 2020 Federal Tax Return and will provide ISU with a 2020 Federal Tax Return Transcript that can be obtained from www.irs.gov.

The student (and spouse) filed a 2020 Federal Tax Return and will provide ISU with a **signed** copy of their 2020 Federal Tax Return and Schedules 1, 2, and 3.

❑ The student (and spouse) **have not and are not required** to file a 2020 Federal Tax Return **and** had **no** earnings from work in 2020.  Student (and spouse) will provide a Verification of Non-filing letter(s) that can be obtained from www.irs.gov.

❑ The student (and spouse) **have not and are not required** to file a 2020 Federal Tax Return but had some earnings from work in 2020.  Student (and spouse) will provide a Verification of Non-filing letter(s) that can be obtained from www.irs.gov and copies of all W2's.  Student (and spouse) will also complete the chart below listing all employers and earnings.  Use a separate sheet if necessary.

|  | Employer(s) Name | 2020 Earnings W-2s (box 1) |
|---|---|---|
| Student | _____ | _____ |
|  | _____ | _____ |
|  | Student Total | _____ |
| Spouse | _____ | _____ |
|  | _____ | _____ |

## D. Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported here to qualify for federal student aid is complete and correct.

_____
Student Name

_____          _____
Student Signature                              Date          Spouse Signature                              Date

_____          _____
Student ISU ID Number                              Cell Phone Number

# Independent Verification Worksheet Instructions

Section C of the Independent Verification Worksheet requests information about the student (and spouse) 2020 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 2020 IRS Tax Return Transcript.  Student's (and spouse's) that did not file a 2020 Federal Tax Return must provide copies of all W2's (if applicable) and a Verification of Non-Filing Letter from the IRS.  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](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 2020 taxes were "Already completed", select the tax filing status and answer whether or not a Puerto Rican or foreign tax return was filed for 2020.  If you answer "No" then the IRS Data Retrieval Tool will be displayed.  Click "link to IRS" and then click "Proceed to IRS Site" and you will then be taken to the IRS website and asked to enter your information.  Enter your name and address exactly how it appears on your 2020 federal tax return.  If the tool can locate tax information, click the option to "transfer now".  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](www.irs.gov) click "Get Your Tax Record". Then choose "Get Transcript Online" or "Get Transcript by Mail". To verify your identity with ID.me, you will need to provide a photo of an identity document such as a driver's license, state ID, or passport. You'll also need to take a selfie with a smartphone or a computer with a webcam. 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](www.irs.gov), click "Get Your Tax Record". Then choose "Get Transcript Online" or "Get Transcript by Mail". To verify your identity with ID.me, you will need to provide a photo of an identity document such as a driver's license, state ID, or passport. You'll also need to take a selfie with a smartphone or a computer with a webcam. 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 be made by completing a 4506-T that can be mailed or faxed to the IRS. Verification of Non-filing letters requested by 4506-T are generally received within 10 business days from the IRS's receipt of your request.