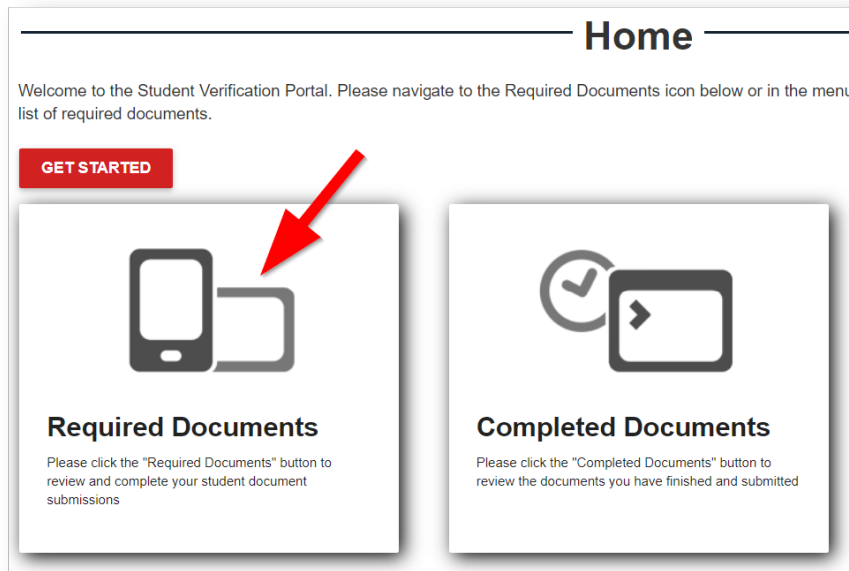


How to Complete the Verification Worksheet for Independent Students



You were selected by the Department of Education to provide this information to our office.

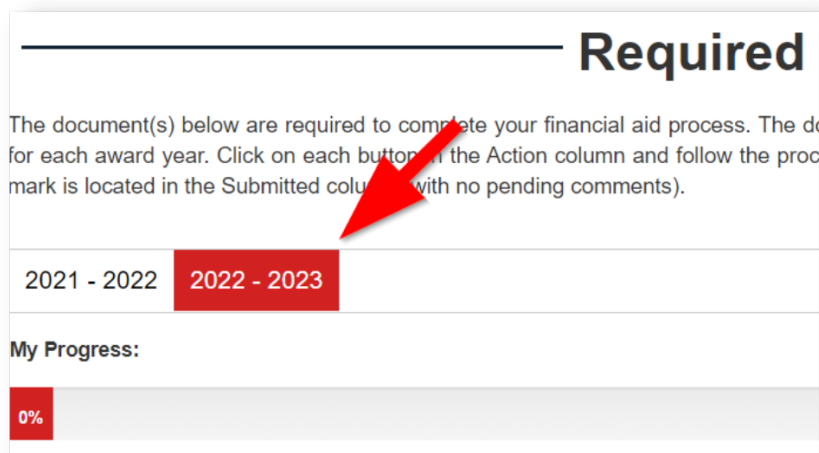


Access your verification portal –
<http://www.financialaid.wisc.edu/verificationportal>

Log In with your UW-Madison
 NetID and password

Click on the **Required Documents** tile

Make sure to click on the correct
 academic year.



Then, click on **FILL OUT** next to the required document.

All required documents must be submitted and approved before the verification process can be completed.

Document	Classification	Action
2022-2023 Verification Worksheet V1 Independent 2223	Verification	FILL OUT

Make sure to read the information and click Next

Verification Worksheet

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information, the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet. Attach any required documents and submit the form to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

Please click 'Next' to get started.

CANCEL

NEXT

Full Name	Age	Relationship
Person A	18	Self

Note: We may require additional documentation if we have

ADD HOUSEHOLD MEMBER

When you reach Section B – Student's Family Information

click **ADD HOUSEHOLD MEMBER**.

Add each person that should be included in your household. You should include your spouse (if married), and any children or dependents living at home if you provided more than 50% of their support or if they would be required to provide parent information on their own FAFSA.

For each household member you add, make sure to click **SAVE**.

****If a household member is still undecided about which college they may attend, please list at least one school they've applied to. DO NOT list 'undecided.'****

Once you've added all household members, click **NEXT**.

Household Member

Full Name

Age

Relationship

Please Select...

In College*

☒ Yes ☐ No

College

*Choose Yes for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2022 and June 30, 2023, and will be enrolled in a degree, diploma, or certificate program.

SAVE **CANCEL**

Section C – Student Income Information

C. Student Income Information to be Verified

- ☒ I (and spouse, if married) filed a 2020 IRS tax return
- ☐ I (and spouse, if married) will not file and are not required to file a 2020 income tax return

1. TAX RETURN FILERS – Important Note: The instructions below apply to the student. Please gather and submit the following documents to your institution.

- A signed copy of the 2020 IRS Form 1040X, "Amended US Individual Income Tax Return" (if applicable)
 - IRS Data Retrieval Tool information on an ISIR record with all tax information
 - A 2020 IRS Tax Return Transcript (that will only include information from the 2020 tax return)
 - A signed copy of the 2020 IRS Form 1040 and the applicable schedules that were filed

Instructions: Complete this section if you, the student, filed a 2020 income tax return with the IRS. *In most cases, no further documentation is needed to verify 2020 income information.*

- ☒ I, the student, have used the IRS Data Retrieval Tool in FAFSA on the web to transfer my tax information. *Your school will use the IRS information that was transferred in the verification process.*

If you filed your federal tax return AND used the IRS Data Retrieval tool – check the first circle and additional information will appear.

Then, also click the first circle in the next list of statements that appear.

If you filed your federal tax return and DID NOT use the IRS Data Retrieval tool – click the circles as seen here.

Also, click these same circles if you listed foreign income on the FAFSA.

click **NEXT**.

If you DID NOT file a federal tax return, but have some income from work – click the circles as seen below.

click **NEXT**.

C. Student Income Information to be Verified

- ☐ I (and spouse, if married) filed a 2020 IRS tax return
- ☒ I (and spouse, if married) will not file and are not required to file a 2020 income tax return

2. TAX RETURN NONFILERS – Complete this section if you, the student will not file a 2020 income tax return.

- ☐ I, the student, was not employed and had no income earned from work in 2020.
- ☒ I, the student, was employed in 2020.

CANCEL

NEXT

C. Student Income Information to be Verified

- ☒ I (and spouse, if married) filed a 2020 IRS tax return
- ☐ I (and spouse, if married) will not file and are not required to file a 2020 income tax return

1. TAX RETURN FILERS – Important Note: The instructions below apply to the student. Please gather and submit the following documents to your institution.

- A signed copy of the 2020 IRS Form 1040X, "Amended US Individual Income Tax Return" (if applicable)
 - IRS Data Retrieval Tool information on an ISIR record with all tax information
 - A 2020 IRS Tax Return Transcript (that will only include information from the 2020 tax return)
 - A signed copy of the 2020 IRS Form 1040 and the applicable schedules that were filed

Instructions: Complete this section if you, the student, filed a 2020 income tax return with the IRS. *In most cases, no further documentation is needed to verify 2020 income information.*

- ☐ I, the student, have used the IRS Data Retrieval Tool in FAFSA on the web to transfer my tax information. *Your school will use the IRS information that was transferred in the verification process.*
- ☐ I, the student, have not yet used the IRS DRT in FAFSA on the web to transfer my tax information.
- ☒ I, the student, am unable or choose not to use the IRS DRT in FAFSA on the web to transfer my tax information and applicable schedules.

A 2020 IRS Tax Return Transcript may be obtained through the following methods:

- Get Transcript by MAIL - Go to www.irs.gov and click "Get Transcript by MAIL." The transcript is generally received within 10 business days of the date of birth, and the mailing address used on your latest tax return.
- Get Transcript ONLINE - Go to www.irs.gov and click "Get Transcript ONLINE." The transcript is generally received within 10 business days of the date of birth, and the mailing address used on your latest tax return.
- Automated Telephone Request - 1-800-908-9946. Make the request within 90 days from the IRS's receipt of the telephone request. The transcript will be mailed to you within 10 business days of your latest tax return.
- Paper-based Request Form - IRS Form 4506T-EZ or IRS Form 4506T.
- Check here if a 2020 IRS Tax Return Transcript(s) has been submitted to the school.
- Check here if a 2020 IRS Tax Return Transcript(s) has been completed until the IRS tax return transcript(s) has been received.

CANCEL

NEXT

Then click on **ADD EMPLOYER**.

C. Student Income Information to be Verified
Please list any employers for which you worked in 2020 but did not include on your 2020 federal tax return.

Name:

ADD EMPLOYER

CANCEL **NEXT**

Fill in the details and click **SAVE**.

****Entering information here will generate a new request for your W-2 to be uploaded****

Employer

Name:

Amount Earned:

Submitting W2: ☒ Yes ☐ No

SAVE **CANCEL**

If you DID NOT file a federal tax return and have no income – click these circles, then **NEXT**.

Verification Worksheet

C. Student Income Information to be Verified

☐ I (and spouse, if married) filed a 2020 IRS tax return.

☒ I (and spouse, if married) will not file and are not required to file a 2020 income tax return with the IRS.

2. TAX RETURN NONFILERS – Complete this section if you, the student will not file and are not required to file a 2020 income tax return with the IRS.

☒ I, the student, was not employed and had no income earned from work in 2020.

☐ I, the student, was employed in 2020.

CANCEL **NEXT**

Section D - Certification

Student's Street Address (include apt. no.)

City State Zip Code

Student's Home Phone Number (include area code)

<< EXT

☒ I certify that all of the information reported on this worksheet is complete and correct.

MODIFY **SUBMIT**

Section D – Certification

****If your address is incorrect, please log into your MyUW Student Center to update.****

- To submit the worksheet
- Check the 'I Certify' box
 - Click **SUBMIT**.