



DEPENDENT STUDENT

Standard Verification Group - Tracking Group V1

Important Notes:
Your 2021-2022 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states before awarding Federal Student Aid, we may ask you to confirm the information you and your parent(s) reported on your FAFSA. To verify that you provided correct information, the financial aid administrator will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences between your application and your financial documents, Louisiana Tech will submit corrections electronically to the Federal Processor. You will receive e-mail confirmation from the Department of Education if changes to your FAFSA are processed. Complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at Louisiana Tech University. We may request 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.
Your school must review the requested information, under the financial aid program rules 34 CFR, Part 668.

Step 1. Student Information

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| STUDENT'S Last Name | First Name | M.I. | STUDENT'S CWID# <u>or</u> SSN# |
| | | | |
| STUDENT'S Local Address (include apt. no.) | | | STUDENT'S Date of Birth (MM/DD/YYYY) |
| | | | |
| City | State | Zip Code | STUDENT's Phone No. (include area code) |
| | | | |
| STUDENT'S Email Address | | | STUDENT's Cell Ph. No# (include area code) |

Step 2. Family Information - Who do you, the parent(s), support?

For any household member who will be enrolled **at least halftime** in a degree program, diploma, or certificate program at an postsecondary educational institution at any time between July 1, 2021, and June 30, 2022, include the name of the college. *If more space is needed, attach a separate page with the student's name and SSN or CWID at the top of the page.*
NOTE: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

- Your parents' household includes:**
- The student.
 - The parents (including a stepparent) even if the student doesn't live with the parents.
 - The parents' other children if the parents will provide more than half of their support from July 1, 2021, through June 30, 2022, or if the other children would be required to provide parental information if they were completing a FAFSA for 2021-2022. Include children who meet either of these standards even if a child does not live with the parents.
 - Other people if they now live with the parents and the parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2022.

Include ALL household members below:

| Full Name | Age | Relationship to Student | If family member is enrolled in college or technical school at least halftime, write college name below. | Will be Enrolled at Least 1/2time |
|-----------|-----|-------------------------|--|-----------------------------------|
| | | Self | Louisiana Tech University | |
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Step 3. Student's Tax Information - *Select A or B below.*

Important Note: The instructions below apply to the **STUDENT ONLY**.

- A. I have already filed a 2019 IRS Tax Return. I understand that the best way to verify income is by using the IRS Data Retrieval Tool when filling out the FAFSA. *Select 1, 2, 3, 4, 5, 6, or 7 below.***
 - 1. I **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2019 IRS income tax return information into the student's FAFSA. *The Financial Aid Office will use the IRS information that was transferred in the verification process.*
 - 2. I **have not yet used** the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA. *Louisiana Tech University cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
 - 3. I am **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2019 IRS Tax Return Transcript(s)**. *To obtain a 2019 IRS Tax Return Transcript, go to www.irs.gov, click "Get Your Tax Record", "Get Transcript Online" and make sure to request the "Return Transcript", or call 1-800-908-9946.*
 - 4. I am required to file a 2019 IRS income tax return and have been **granted a filing extension** by the IRS. I will provide the following documents:
 - a. A copy of the IRS's approval of an extension beyond the automatic six-month extension for year 2019; and
 - b. A copy of IRS Form W-2 for each source of employment income received for tax year 2019 and,
 - c. If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2019.
 - 5. I have **filed an amended** IRS income tax return for tax year 2019. I will provide a signed copy of the 2019 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS in addition to:
 - a. A **2019 IRS Tax Return Transcript** (that will only include information from the original tax return & does not have to be signed), OR any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
 - b. A signed copy of the 2019 IRS Form 1040 and the applicable schedules that were filed with the IRS.
 - 6. I am a **victim of identity theft** and have been unable to obtain a **2019 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. I will provide the following documents:
 - a. A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2019 income tax return (1040) and applicable schedules the individual filed with the IRS (include W2's for 2019.) **and,**
 - b. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.
 - 7. I am an individual **who filed or will file a 2019 income tax return with the relevant taxing authority of a U.S. territory, commonwealth,** (e.g., Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), **or with a foreign central government.** I will provide a signed copy of the 2019 tax account info. issued by the tax authority.
- B. I will not file and am not required to file a 2019 income tax return with the IRS.**

Note: We may require you to provide documentation from the IRS that indicates a 2019 IRS income tax return was not filed with the IRS.

1. Student's Work Information - *Select a or b below.*

- a. I was **not employed** and had no income earned from work in 2019.
- b. I was employed in 2019 and have listed below the names of all my employers, the amount earned from each employer in 2019, and whether an IRS W-2 Form is attached. [Provide copies of all 2019 IRS W-2 Forms issued to you and your spouse by employers]. List every employer even if they did not issue an IRS W-2 Form. *If more space is needed, attach separate page with the student's name and Social Security Number or CWID at the top.*

| Employer's Name | Employee (student) | 2019 Annual Amount Earned | W-2 Attached? |
|---------------------------------|--------------------|---------------------------|---------------|
| Suzu's Auto Body Shop (example) | Jane Student | \$2,000 (example) | Yes (example) |
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Step 4. Parent's Tax Information - *Select A or B below.*

Important Note: The instructions below apply to the parent(s). If two parents were reported in Section 2 of this worksheet, the instructions apply to both parents. Notify the financial aid office if the parents filed separate IRS income tax returns for 2019 or had a change in marital status after the end of the 2019 tax year on December 31, 2019.

- A. I have already filed a 2019 IRS Tax Return. I understand that the best way to verify income is by using the IRS Data Retrieval Tool when filling out the FAFSA. *Select 1, 2, 3, 4, 5, 6, or 7 below.***
1. The parents **have used** the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2019 IRS income tax return information into the student's FAFSA. *The Financial Aid Office will use the IRS information that was transferred in the verification process.*
2. The parents **have not yet used** the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to transfer 2019 IRS income tax return information into the student's FAFSA. *Louisiana Tech University cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
3. The parents are **unable or choose not to use** the IRS Data Retrieval Tool in FAFSA on the Web, and instead will provide the school with a **2019 IRS Tax Return Transcript(s)**. *To obtain a 2019 IRS Tax Return Transcript, go to www.irs.gov, click "Get Your Tax Record", "Get Transcript Online" and make sure to request the "Return Transcript", or call 1-800-908-9946.*
4. The parents are required to file a 2019 IRS income tax return and have been **granted a filing extension** by the IRS. The parents will provide the following documents:
- a. A copy of the IRS's approval of an extension beyond the automatic six-month extension for year 2019; and
- b. A copy of IRS Form W-2 for each source of employment income received for tax year 2019 and,
- c. If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2019.
5. The parents have **filed an amended** IRS income tax return for tax year 2019. The parents will provide a signed copy of the 2019 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS in addition to:
- a. A **2019 IRS Tax Return Transcript** (that will only include information from the original tax return & does not have to be signed), OR any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- b. A signed copy of the 2019 IRS Form 1040 and the applicable schedules that were filed with the IRS.
6. The parents are a **victim of identity theft** and have been unable to obtain a **2019 IRS Tax Return Transcript** or use the IRS Data Retrieval Tool. The parents will provide the following documents:
- a. A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or if unable to obtain a TRDBV, an equivalent document provided by the IRS or a copy of the signed 2019 income tax return (1040) and applicable schedules the individual filed with the IRS (include W2's for 2019.) **and,**
- b. A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.
7. Parent(s) are an individual **who filed or will file a 2019 income tax return with the relevant taxing authority of a U.S. territory, commonwealth,** (e.g., Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), **or with a foreign central government.** Parent(s) will provide a signed copy of the 2019 tax account info. issued by the tax authority.
- B. I will not file and am not required to file a 2019 income tax return with the IRS.**

Note: We may require you to provide documentation from the IRS that indicates a 2019 IRS income tax return was not filed with the IRS.

1. Parent's Work Information - *Select a or b below.*

- a. Neither parent was employed, and neither had income earned from work in 2019.
- b. One or both parents were employed in 2019 and have listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 Form is attached. [Provide copies of all 2019 IRS W-2 Forms issued to the parents by their employers]. List every employer even if they did not issue an IRS W-2 Form. *If more space is needed, attach separate page with the student's name and Social Security Number or CWID at the top.*

| Employer's Name | Employee (student) | 2019 Annual Amount Earned | W-2 Attached? |
|---------------------------------|--------------------|---------------------------|---------------|
| Suzu's Auto Body Shop (example) | Jane Student | \$2,000 (example) | Yes (example) |
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Step 5. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date this worksheet.

Note: If we have reason to believe that the information is not accurate, we may require additional documentation.

Student's Signature:

Date:

Parent's Signature:

Date: