LOUISIANA TECH UNIVERSITY
Office of Financial Aid
2021-2022 Verification Worksheet

INDEPENDENT STUDENT   **Aggregate Verification Group - Tracking Group V5**

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 spouse (if married) 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

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 student, 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.*

<u>NOTE:</u> *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.*

People in your household include:
- Yourself.
- Your spouse if you are married.
- Your children or your spouse's children if you or your spouse will provide more than half of the children's support from July 1, 2021, through June 30, 2022, even if a child does not live with you.
- Other people if they now live with you and for whom you or your spouse provides more than half of the other person's support and will continue to provide more than half of that person's 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	

Step 3. Student's (and Spouse's) Tax Information - *Select A or B below*.

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed a separate IRS income tax return 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.** 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 (and Spouse's) Work Information - *Select a or b below*.

    ☐ **a.** Me and my spouse were **not employed** and had no income earned from work in 2019.

    ☐ **b.** Me and/or my spouse were employed in 2019 and have listed below the names of all our 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 you and your spouse by employers]. List every employer even if they did not issue a 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 or spouse)	2019 Annual Amount Earned	W-2 Attached?
Suzy's Auto Body Shop (example)	*Jane Student*	*$2,000 (example)*	Yes *(example)*

Step 4. High School Completion Status

Provide <u>one</u> of the following documents to indicate the student's high school completion status when the student begins college in 2021-2022:

Choose the document that you will attach to this worksheet: [   ]

1	A copy of the student's high school diploma.
2	For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
3	A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
4	A state certificate or transcript received by a student after the student passed a State-authorized examination that theState recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination).
5	An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
6	For a student who was homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
7	For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.
8	A student who is unable to obtain the documentation listed above must contact the financial aid office.

Step 5. Identity and Statement of Educational Purpose

In order to complete the Verification process, the student must appear in person at <u>Louisiana Tech University</u> to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

If the student is unable to appear in person at Louisiana Tech University to verify his or her identity, the student must provide to the institution:
(a)   A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and
(b)   The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of Educational
<div align="center"><i>Print Student's Name</i></div>

Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the

cost of attending <u>Louisiana Tech University</u> for 2021-2022.

Student's Signature: _____   Student's ID Number: _____

Financial Aid Administrator Signature: _____   Date: _____

Notary's Certificate of Acknowledgement   *- necessary only if you cannot appear in person*

State of: _____   City/County of: _____   on: _____
<div align="right"><i>Date</i></div>

before me, _____   personally appeared, _____
<i>Notary's Name</i>   <i>Printed name of signer</i>

And proved to me on basis of satisfactory evidence of identification

_____
<i>Type of government-issued photo ID provided</i>

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

_____
<i>Notary's Signature</i>   <i>Notary Seal</i>

My commission expires on _____
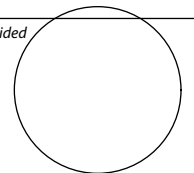
Step 6. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent <u>must</u> sign and date.
WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature: [   ]   Date: [   ]

Parent's Signature: [   ]   Date: [   ]

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