



LOUISIANA TECH UNIVERSITY
Office of Financial Aid
2022-2023 Verification Worksheet

Please return this completed form to:
 Louisiana Tech University
 Office of Financial Aid
 PO Box 7925 Ruston, LA 71272

DEPENDENT STUDENT

Aggregate Verification Group - Tracking Group V5

Important Notes:

Your 2022-2023 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

STUDENT'S Last Name	First Name	MI	STUDENT'S CWID or SSN
STUDENT'S Local Address (include Apt. No.)			STUDENT'S Date of Birth (MM/DD/YYYY)
City	State	Zip Code	STUDENT'S Home Phone (Include area code)
STUDENT'S Email Address			STUDENT'S Cell Phone (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 post-secondary educational institution at any time between July 1, 2022, and June 30, 2023, 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 post-secondary 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, 2022, through June 30, 2023, or if the other children would be required to provide parental information if they were completing a FAFSA for 2022-2023. 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 July 1, 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, please provide the college/school name below	Will be Enrolled at least halftime
		Self	Louisiana Tech University	

Step 3: STUDENT'S Tax Information - Please Select either A or B below. Do not complete both.

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

A. I have already filed a 2020 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 2020 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 2020 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 2020 IRS Tax Return Transcript(s). *To obtain a 2020 IRS Tax Return Transcript, go to www.irs.gov, click "Get Your Tax Record", "Get Transcript Online" or "Get Transcript by Mail", or call 1-800-908-9946 to request your 2020 Transcript.*
4. I am required to file a 2020 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 2020; and
 - b. A copy of IRS Form W-2 for each source of employment income received for tax year 2020 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 2020.
5. I have **filed an amended** IRS income tax return for tax year 2020. I will provide a **signed copy** of the 2020 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS in addition to:
 - a. **A 2020 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 2020 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 2020 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 2020 income tax return (1040) and applicable schedules the individual filed with the IRS (include W2's for 2020.) 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 2020 income tax return with the relevant taxing authority of a U.S. territory, common wealth, (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 2020 tax account info. issued by the tax authority.

B. I will not file and am not required to file a 2020 income tax return with the IRS.

Note: We may require you to provide documentation from the IRS that indicates a 2020 IRS income tax return was not filed with the IRS, i.e. IRS Verification of Nonfiling Transcript.

1. Student's Work Information - Select a or b below, but not both.

- a. I was not employed and had no income earned from work in 2020.
- b. I was employed in 2020 and have listed below the names of all my employers, the amount earned from each employer in 2020, and indicated whether an IRS W-2 Form is attached. [Provide copies of all 2020 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)	2020 Annual Amount Earned	W-2 Attached?
Suzy's Auto Body Shop (example)	Jane Student (example)	\$2,000.00 (example)	Yes (example)

Step 4: Parent's Tax Information - Please Select either A or B below. Do not complete both.

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 Office of Financial Aid if the parents filed separate IRS income tax returns for 2020 or had a change in marital status after the end of the 2020 tax year on December 31, 2020.

A. The parents have already filed a 2020 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 2020 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 2020 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 2020 IRS Tax Return Transcript(s). *To obtain a 2020 IRS Tax Return Transcript, go to www.irs.gov, click "Get Your Tax Record", "Get Transcript Online" or "Get Transcript by Mail", or call 1-800-908-9946 to request your 2020 Transcript.*
4. The parents are required to file a 2020 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 2020; and
 - b. A copy of IRS Form W-2 for each source of employment income received for tax year 2020 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 2020.
5. The parents have **filed an amended** IRS income tax return for tax year 2020. The parents will provide a **signed copy** of the 2020 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS in addition to:
 - a. **A 2020 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 2020 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 2020 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 2020 income tax return (1040) and applicable schedules the individual filed with the IRS (include W2's for 2020.) 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. The parents are individuals **who filed or will file a 2020 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**. The parents will provide a signed copy of the 2020 tax account info. issued by the tax authority.

B. I will not file and am not required to file a 2020 income tax return with the IRS.

Note: We may require you to provide documentation from the IRS that indicates a 2020 IRS income tax return was not filed with the IRS, i.e. IRS Verification of Nonfiling Transcript.

1. Parent's Work Information - Select a or b below, but not both.

- a. Neither parent was not employed and had no income earned from work in 2020.
- b. One or both parents were employed in 2020 and have listed below the names of all my employers, the amount earned from each employer in 2020, and indicate whether an IRS W-2 Form is attached. [Provide copies of all 2020 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)	2020 Annual Amount Earned	W-2 Attached?
Suzy's Auto Body Shop (example)	Jane Student (example)	\$2,000.00 (example)	Yes (example)

Step 5: Identity and Statement of Educational Purpose

In order to complete the Verification process, the student must appear in person at the Louisiana Tech University Office of Financial Aid 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 a 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, a Statement of Educational Purpose provided below.

Statement of Educational Purpose (TO BE SIGNED AT THE INSTITUTION)

I certify that I, _____, am the individual signing this Statement of Educational Purpose, and that the Federal student financial assistance I may receive will only be for educational purposes and to pay the cost of attending Louisiana Tech University for the academic year, 2022-2023.

Student's Signature: _____ Student CWID: _____

Financial Aid Administrator's Signature: _____ Date: _____

Identity and Statement of Educational Purpose (to be signed in the presence of a notary).

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:

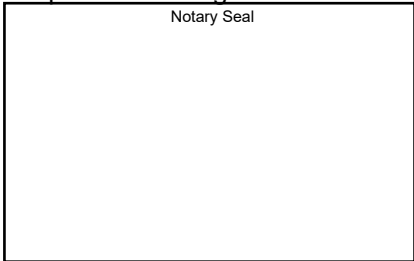
- (a) a copy of the unexpired, valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to a driver's license, other state-issued ID, or passport; and
- (b) the original Statement of Educational Purpose 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.

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

State of _____ City/County of _____ on _____

before me, _____ personally appeared, _____

and proved to me on basis of satisfactory evidence of identification to be the above-named person who signed the foregoing instrument. _____



WITNESS my hand and official seal _____

My commission expires on _____

Step 6: Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on this worksheet 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 Printed Name: _____ Student CWID: _____

Student's Signature: _____ Date: _____

Parent's Printed Name: _____

Parent's Signature: _____ Date: _____