



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

INDEPENDENT STUDENT

Standard Verification Group - Tracking Group V1

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 student, 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.

- People in your household include:
- Yourself.
 - Your spouse if you are married.
 - Your children or your spouse's children if you will provide more than half of the children's support from July 1, 2022, through June 30, 2023, 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 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 | |
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Step 3: STUDENT'S (and spouse's) Tax Information - Please Select either A or B below. Do not complete both.

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the Office of Financial Aid if the student or spouse filed a separate IRS income tax return for 2020 or had a change in marital status after the end of the othe 2020 tax year on December 31, 2020.

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 (and Spouse'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) |
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Step 4: Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on this worksheet is complete and correct. The Student MUST sign and date this worksheet. If married, the spouse's signature is optional.

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:

Spouse's Printed Name:
(Optional)

Spouse's Signature:
(Optional)

Date: