

2023-2034 Verification Worksheet Details

for Dependent Students (Standard Verification Group - Tracking Group V1)

READ: Before you begin...

Your 2023-2024 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 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 email confirmation from the Department of Education if changes to your FAFSA are processed. 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. **Our school must review the requested information, under the financial aid program rules 34 CFR, Part 668.**

STEP 1: Family Information

For any household member who will be enrolled at least half time in a degree program, diploma, or certificate program at any post secondary educational institution at any time between July 1, 2023 and June 30, 2024, 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 household members enrolled in eligible post secondary educational institutions is inaccurate.

Your Parents' household includes:

- the student
- the parents (including step parent) 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, 2023 to June 30, 2024, or if the children would be required to provide parental information if they were completing a FAFSA for 2023-2024. 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 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, 2024.

RETURN TO THE VERIFICATION WORKSHEET AND INCLUDE ALL HOUSEHOLD MEMBERS IN THE FIELDS IN STEP #1.

STEP 2: Student's Tax Information

These instructions apply to the STUDENT ONLY. The student will choose one of the sections below:

1. Filed - Used the IRS Data Retrieval Tool on FAFSA
 - a. I **have used the IRS Data Retrieval Tool** in FAFSA on the web to transfer 2021 IRS income information into the student's FAFSA, either on the initial FAFSA or when making correction to the FAFSA. The Office of Financial Aid will use the IRS information that was transferred in the verification process.
2. Filed - Will update FAFSA using IRS Data Retrieval
 - a. I **have not yet used the IRS Data Retrieval Tool** in FAFSA on the web, but will use the tool to transfer 2021 IRS income information into the student's FAFSA. Louisiana Tech University can not complete the verification process until the IRS information has been transferred into the FAFSA.
3. Filed - Did not and will not use IRS Data Retrieval
 - a. 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 2021 IRS Tax Return Transcript(s). *To obtain a 2021 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 2021 Transcript, or complete IRS Form 4506T-EZ or 4506-T.*

4. WILL FILE - Granted a 2021 filing extension
 - a. I am required to file a 2021 IRS Income tax return and have been **granted a filing extension** by the IRS. I will provide the following documents:
 - i. A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2021; and
 - ii. A copy of IRS form W-2 for each source of employment income received for tax year 2021; and
 - iii. If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for the tax year 2021.
5. FILED - Amended IRS tax return filed for 2021
 - a. I have **filed an amended** IRS income tax return for tax year 2021. I will provide **a signed copy** of the 2021 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS in addition to:
 - i. A 2021 IRS Tax Return Transcript (that will only include information from the original tax return and 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
 - ii. A signed copy of the 2021 IRS Form 1040 and the applicable schedules that were filed with the IRS.
6. FILED - I am a victim of Identify Theft
 - a. I am a **victim of identify theft** and have been unable to obtain a 2021 IRS Tax Return Transcript or use the IRS Data Retrieval Tool. I will provide the following documents:
 - i. 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 2021 Income Tax Return (1040) and applicable schedules the individual filed with the IRS (include W-2's for 2021); and
 - ii. 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. FILED - **Filed a tax return in a foreign country.**
 - a. I am an individual 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. I will provide a signed copy of that 2021 tax account information issued by the tax authority.
8. DID NOT FILE - Not employed or no income
 - a. I was not employed and had no income earned from work in 2021. *We may require Verification of Non-Filing documentation from the IRS, in specific circumstances.*
9. DID NOT FILE - Employed, but not required to file
 - a. I was employed in 2021 and have listed below the name of all my employers, the amount earned from each employer in 2021, and indicate whether an IRS W-2 Form is attached. [Provide copies of all 2021 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.

RETURN TO THE VERIFICATION WORKSHEET AND SELECT AN OPTION IN STEP 2.

If you selected "DID NOT FILE - Employed, but not required to file," list every employer for your and / or your spouse, even if they did not issue an IRS W-2.

STEP 3: Parent's Tax Information

You may refer to Step 2 for explanations of the choices available in Step 3.

NOTE: If the parent selected "DID NOT FILE - Employed, but not required to file," list every employer for you and/or your spouse even if they did not issue an IRS W-2.

Return to Verification Worksheet and select an option in Step 3.

If you selected "DID NOT FILE - Employed, but not required to file," list every employer for you and/or your spouse even if they did not issue an IRS W-2.