



# LOUISIANA TECH UNIVERSITY

## Office of Financial Aid

### 2024-2025 Verification Worksheet - Group V1

Please return this completed form to:

Louisiana Tech University

Office of Financial Aid

PO Box 7925 Ruston, LA 71272

### Standard Verification Group - Tracking Group V1

#### Important Notes:

Your 2024-2025 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 your parent(s) (Dependent Student) or you (Independent 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, 2024, and June 30, 2025, 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, 2024, through June 30, 2025, or if the other children would be required to provide parental information if they were completing a FAFSA for 2024-2025. 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, 2025.

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 (and Spouse's - If Independent) 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 2022 or had a change in marital status after the end of the 2022 tax year on December 31, 2022.

**A. Instructions:** Complete this section if the student and spouse filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the student (or spouse, if applicable) was not available or could not be used, the student should provide the institution with a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

1. 2022 IRS Tax Return Transcript may be obtained through:
  - **Get Transcript by Mail** - go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
  - **Get Transcript Online** - Go to [www.irs.gov](http://www.irs.gov), click "Get your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay as you go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The Transcript displays online upon successful completion of the IRS's two-step authentication.
  - **Automated Telephone Request** - 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
  - **Paper Request Form** - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
2. I am required to file a 2022 IRS income tax return and have been **granted a filing extension** by the IRS, beyond the automatic six-month extension for tax year 2022. I will provide the following documents:
  - a. A signed statement listing the sources of any 2022 income and the amount of income from each source; and
  - b. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022; and
  - c. A copy of IRS Form w-2 for each source of employment income received or an equivalent document for tax year 2022; and
  - d. If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2022.
3. I have **filed an amended** IRS income tax return for tax year 2022. I will provide a **signed copy** of the 2022 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
  - a. **A 2022 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 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.
  - c. Updated income and tax information from the IRS on a ISIR record with all tax information from the original tax return.
4. I am a **victim of identity theft** and, 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 2022 income tax return (1040) and applicable schedules the individual filed with the IRS (include W2's for 2022.) 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.
5. I am a tax filer who filed an income tax return with a tax authority other than the IRS may must provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the Office of Financial Aid with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

**B. I will not file and am not required to file a 2022 income tax return with the IRS.**

**Note: We may require you to provide documentation from the IRS that indicates a 2022 IRS income tax return was not filed with the IRS, i.e. IRS Verification of Nonfiling Transcript.**

**1. Student's ( or Spouse if Independent Student) Work Information - Select a or b below, but not both.**

- a. The Student or Student's Spouse were not employed and had no income earned from work in 2022.
- b. The Student or Student's Spouse were employed in 2022 and have listed below the names of all my employers, the amount earned from each employer in 2022, and indicated whether an IRS W-2 Form is attached. [Provide copies of all 2022 IRS W-2 Forms is sued 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 need ed, attach separate page with the student's name and Social Security Number or CWID at the top.*

Employer's Name	Employee (student)	2022 Annual Amount Earned	W-2 Attached?
Suzy's Auto Body Shop (example)	Jane Student (example)	\$2,000.00 (example)	Yes (example)
<b>Total Amount of Income Earned from Work</b>		\$	

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

Confirmation of nonfiling or a signed statement **IS PROVIDED.**

Confirmation of nonfiling or a signed statement **WILL BE PROVIDED LATER.**

**Step 4: Parent's Tax Information (for Dependent Students ONLY) - Please Select either A or B below. Do not complete both.**

**Important Note:** The instructions below apply to each parent. Notify the Office of Financial Aid if the parent's filed separate IRS income tax returns for 2022 or had a change in marital status after the end of the 2022 tax year on December 31, 2022.

**A. Instructions:** Complete this section if the parent's filed or will file a 2022 IRS income tax return(s). As part of federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.

If 2022 income tax return information for the parent was not available or could not be used, the parent should provide the institution with a **2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.**

1. 2022 IRS Tax Return Transcript may be obtained through:
  - Get Transcript by Mail - go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Transcript by Mail." Make sure to requires the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
  - Get Transcript Online - Go to [www.irs.gov](http://www.irs.gov), click "Get your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript" To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a tex-enabled mobile phone (pay as you go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The Transcripts displays online upon successful completion of the IRS's two-step authentication.
  - Automated Telephone Request - 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
  - Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.
2. I am required to file a 2022 IRS income tax return and have been **granted a filing extension** by the IRS, beyond the automatic six-month extension for tax year 2022. I will provide the following documents:
  - a. A signed statement listing the sources of any 2022 income and the amount of income from each source; and
  - b. A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2022; and
  - c. A copy of IRS Form w-2 for each source of employment income received or an equivalent document for tax year 2022; and
  - d. If self-employed, a signed statement certifying the amount of the individual's AGI and the U.S. income tax paid for tax year 2022.
3. I have **filed an amended** IRS income tax return for tax year 2022. I will provide a **signed copy** of the 2022 IRS Form 1040X, "Amended US Individual Income Tax Return," filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
  - a. **A 2022 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 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS.
  - c. Updated income and tax information from the IRS on a ISIR record with all tax information from the original tax return.
4. I am a **victim of identity theft** and, 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 2022 income tax return (1040) and applicable schedules the individual filed with the IRS (include W2's for 2022.) 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.
5. I am a tax filer who filed an income tax return with a tax authority other than the IRS may must provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the Office of Financial Aid with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

**B. I will not file and am not required to file a 2022 income tax return with the IRS.**

**Note: We may require you to provide documentation from the IRS that indicates a 2022 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 2022.
- b. Neither parent was employed in 2022 and have listed below the names of all my employers, the amount earned from each employer in 2022, and indicated whether an IRS W-2 Form is attached. [Provide copies of all 2022 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)	2022 Annual Amount Earned	W-2 Attached?
Suzy's Auto Body Shop (example)	Jane Student (example)	\$2,000.00 (example)	Yes (example)
<b>Total Amount of Income Earned from Work</b>		\$	

Provide a signed and dated statement certifying that the individual has not filed and is not required to file a 2022 income tax return, as well as the sources of 2022 income earned from work and the amount of income from each source.

Confirmation of nonfiling or a signed statement **IS PROVIDED.**

Confirmation of nonfiling or a signed statement **WILL BE PROVIDED LATER.**

**Step 5: Certification and Signatures**

**Each person signing this worksheet certifies that all of the information reported on this worksheet is complete and correct.**

**DEPENDENT STUDENTS: The Student and one parent MUST sign and date this worksheet.**

**INDEPENDENT STUDENTS: The Student and spouse (if applicable) 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 or Spouse's  
Printed Name:

Parent's or Spouse's  
Signature:

Date: