

2023-2024 Verification Worksheet

V1 Independent

What is Verification? – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation that we use to verify the information reported on your FAFSA. If there are discrepancies, we may make corrections to your FAFSA based on the documentation you provide. During the verification process we may determine that additional documents need to be submitted.

What do I need to do? - To complete the verification process you should read this worksheet thoroughly and answer all questions. Return the worksheet and all requested documentation to the Office of Student Financial Services as soon as possible to prevent a delay in the processing of financial aid. The preferred method to submit tax documents is through the usage of the Data Retrieval Tool on the FAFSA. If you are unable to use the Data Retrieval Tool, you may submit copies of your 2021 Tax Return Transcript from the IRS. To obtain a copy of the Tax Return Transcript, you may contact the IRS via one of the methods listed below. If you choose to submit your 2021 Tax Return (Form 1040), it must be **signed** and must include **all** applicable schedules for the year. For tax return non-filers, the verification of non-filing letter may also be obtained from the IRS using one of the methods below.

IRS Get Transcript Service: <https://www.irs.gov/individuals/get-transcript>

IRS Automated Phone Request Number: 1-800-908-9946

IRS Form 4506T-EZ for Tax Return Transcript: <https://www.irs.gov/pub/irs-pdf/f4506tez.pdf>

IRS Form 4506-T for Verification of Non-Filing and Other Transcripts: <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>

A. Student Information

Student Name	Date of Birth	LMU Student ID

Address

City	State	Zip	Phone (include area code)

B. Family Information

List the people in your household, including:

- yourself and your spouse if you have one, and
- your children, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, even if they do not live with you, and;
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member who will be attending **at least half time** between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Legal Name	Relationship	Age	College Attending
	Self		Lincoln Memorial University

C. Student's Tax Forms and Income Information

1. Did you file a 2021 Federal Tax Return?
- Yes, I filed a 2021 Federal Tax Return and I used the IRS Data Retrieval Tool. (**Preferred option**) (skip to section D)
- Yes, I filed a 2021 Federal Tax Return and I am attaching a copy of my tax return transcript. (skip to section D)
- Yes, I filed a 2021 Federal Tax Return and I am attaching a **SIGNED** copy of the tax return and **ALL** applicable schedules. (skip to section D)
- No, I did not file and was not required to file a 2021 Federal Tax Return. (If no, please answer questions 2 & 3.)
2. **TAX RETURN NON-FILERS ONLY** – Complete this section if you will not file and are not required to file a 2021 income tax return with the IRS. Check the box that applies:
- The student was not employed and had no income earned from work in 2021.
- The student was employed in 2021. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)
- | Income earned from work: Use the W-2 or other earnings statements (<i>Non-tax filers only</i>) | | |
|--|--------------------|---------------|
| Employer(s) Name | 2021 Amount Earned | W-2 Attached? |
| | \$ | |
| | \$ | |
3. **TAX RETURN NON-FILERS ONLY** – Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.
- Check here if confirmation of non-filing is provided.
- Check here if confirmation of non-filing will be provided later.

D. Spouse's Tax Forms and Income Information (if applicable)

1. Did your spouse file a 2021 Federal Tax Return?
- Yes, my spouse filed a 2021 Federal Tax Return and used the IRS Data Retrieval Tool. (**Preferred option**) (skip to section E)
- Yes, my spouse filed a 2021 Federal Tax Return and is attaching a copy of the tax return transcript. (skip to section E)
- Yes, my spouse filed a 2021 Federal Tax Return and is attaching a **SIGNED** copy of the tax return and **ALL** applicable schedules. (skip to section D)
- No, my spouse did not file and was not required to file a 2021 Federal Tax Return. (If no, please answer questions 2 & 3.)
2. **TAX RETURN NON-FILERS ONLY** – Complete this section if your spouse will not file and is not required to file a 2021 income tax return with the IRS. Check the box that applies:
- Spouse was not employed and had no income earned from work in 2021.
- Spouse was employed in 2021. Please complete the table below and attach copies of all W-2s. List every employer, even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)
- | Income earned from work: Use the W-2 or other earnings statements (<i>Non-tax filers only</i>) | | |
|--|--------------------|---------------|
| Employer(s) Name | 2021 Amount Earned | W-2 Attached? |
| | \$ | |
| | \$ | |
3. **TAX RETURN NON-FILERS ONLY** – Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.
- Check here if confirmation of non-filing is provided.
- Check here if confirmation of non-filing will be provided later.

E. Signature(s)

Each person signing below certifies that all of the information reported is complete and correct. Each person also understands that if any of the information reported on this form is inconsistent with what has been reported on the FAFSA, additional documentation may be required.

Student's Signature

Date

Spouse's Signature (Optional)

Date

WARNING:

If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.