

2025-2026 V5 Independent Verification Worksheet

What is Verification? – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation to verify the information reported on your FAFSA. We may correct your FAFSA based on your provided documentation if there are discrepancies. During the verification process, it may be determined that additional documents are needed.

Instructions: Read this worksheet thoroughly and answer all questions. Your student ID number can be found in MyLMU > “Self Service Menu” > “WebAdvisor for Students” > “My Profile.” Return the worksheet and all requested documentation to the Office of Student Financial Services as soon as possible to prevent financial aid processing delays.

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 2023 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 2023 income information that was transferred into the student’s FAFSA using the income and tax information directly from the IRS via the FA-DDX.**

If 2023 income tax information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A 2023 IRS Tax Return Transcript may be obtained through:

- **Get Transcript by Mail** – Go to www.irs.gov, click “Get Your Tax Record.” Click “Get 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, click “Get Your Tax Record.” Click “Get Transcript Online.” Make sure to request the “Return Transcript” and NOT the “Account Transcript.” Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit help.id.me.
- **Automated Telephone Request** – 1-800-908-9946. The 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.

A. Student Information

Student Name	Date of Birth	LMU Student ID Number

Address

City	State	Zip	Phone (include area code)

B. Family Size

List the people in your household, including:

- The student.
- The student’s spouse, if applicable.
- The student’s dependent children if all of the following are true:
 - They live with the student (or live apart because of college enrollment),
 - They receive more than half of their support from the student, and
 - They will continue to receive more than half of their support from the student from July 1, 2025, through June 30, 2026.
- Other persons if the following are true:
 - They live with the student,
 - They receive more than half of their support from the student, and
 - They will continue to receive more than half of their support from the student from July 1, 2025, through June 30, 2026.

The provided criteria for “dependent children” or “other persons” mirror the requirement that family size align with those the student could claim as a dependent on a U.S. tax return if the student were to file a U.S. tax return at the time of completing the 2025-2026 FAFSA. As a result, the student should not include any unborn children in the family size.

Provide a separate page with the student’s name and ID number at the top if additional space is needed.

Full Legal Name	Age	Relationship
		Self

C. Student Tax Information

1. Did you (the student) file a 2023 Federal Tax Return?
 - YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2023 IRS Tax Return Transcript OR a signed copy of your 2023 Federal Tax Return along with ALL applicable schedules. *(Skip to section D.)*
 - NO.** I did not, will not, and was not required to file a 2023 income tax return with the IRS. *(Must answer question 2 and sign.)*

2. **TAX RETURN NON-FILERS ONLY** – Complete this section if you (the student) will not file and are not required to file a 2023 income tax return with the IRS. Check all boxes that apply:
 - I was not employed and had no income earned from work in 2023.
 - I was employed in 2023. 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.)
 - I had other sources of income. Please complete the table below and list the sources and amounts of earnings, other income, and resources that were used to support you in 2023. (Attach another sheet if additional space is needed.)

Employer(s) Name or Other Source of Income	2023 Amount Earned	W-2 Attached?
	\$	
	\$	
	\$	

Signature of Student (only if tax return non-filer): _____ Date: _____

D. Spouse Tax Information (if applicable)

Spouse Name: _____

- Did the student’s spouse file a 2023 Federal Tax Return?
 - YES.** While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2023 IRS Tax Return Transcript OR a signed copy of your 2023 Federal Tax Return along with ALL applicable schedules. **(Skip to section E.)**
 - NO.** I did not, will not, and was not required to file a 2023 income tax return with the IRS. **(Must answer question 2 and sign.)**
- TAX RETURN NON-FILERS ONLY** – Complete this section if the spouse will not file and is not required to file a 2023 income tax return with the IRS. Check all boxes that apply:
 - I (the spouse) was not employed and had no income earned from work in 2023.
 - I (the spouse) was employed in 2023. 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.)
 - I (the spouse) had other sources of income. Please complete the table below and list the sources and amounts of earnings, other income, and resources that were used to support you in 2023. (Attach another sheet if additional space is needed.)

Employer(s) Name or Other Source of Income	2023 Amount Earned	W-2 Attached?
	\$	
	\$	
	\$	

Signature of Spouse (only if tax return non-filer): _____ Date: _____

E. Certifying Signature

By signing below, I (the student) certify that all the information reported is complete and correct. I (the student) also understand 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. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student’s Signature (Legal Name)

Date

TO RETURN THIS FORM:

Mail to: Lincoln Memorial University
Office of Student Financial Services
6965 Cumberland Gap Parkway
Harrogate, TN 37752

In Person: Office of Student Financial Services
DAR-Whitford Hall – Main Campus

