

Pacific Lutheran University 2023-2024 Verification Worksheet - DependentV5

Your FAFSA has been selected by the Federal Student Aid processor for a review process called verification. Financial Aid program regulations (34 CFR, Part 668) require schools to check the accuracy of information provided on a selected 2023-24 FAFSA and send to the Federal Student Aid processor any necessary corrections identified in the verification process. Your current aid offer is not final and all need-based student aid cannot be disbursed until verification has been completed.

Student's Name:

Student's email Address:

Student phone #:

1. As of today: FAMILY/HOUSEHOLD & COLLEGE INFORMATION (Check and respond to each box)

List yourself

List both biological/legal parents if they live together, regardless of their marital status. If not living together, list the parent with whom you lived most over the past 12 months. If you do not live with either parent, list the parent who provided the most financial support over the past 12 months. If this parent has remarried, step-parent must also be listed.

List your parents' other children/step-children, even if they don't live with your parent(s), ONLY IF

- A. Your parent(s) will provide more than half of their support from July 1, 2023 through June 30, 2024, or
- B. The child would be required to provide your parent's information when applying for Federal Student Aid on the FAFSA. Do not include foster children in the household.

List other people if they <u>now</u> live with your parent(s) and your parent(s) 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.

Name	Age	Relationship	College attending in 2023-24 (half time or more) Do NOT include if in Running Start or college in high school programs.
	XXXX	Self	Pacific Lutheran University
	XXXX	Parent1	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
	XXXX	Parent2 (if applicable)	*****

If you need more space, please attach a separate sheet.

2020 Income & Tax Documentation: If you and/or your parent(s) were required to file a 2021 U.S. tax return, you have three options for providing this information to PLU:

1). If you successfully transferred your and your parents' tax information using the **IRS Data Retrieval Tool** (DRT) when you filed your FAFSA, you are done. If you did not, you can return to your online FAFSA and may make corrections to your FAFSA by utilizing the DRT to meet this requirement, or 2). Submit a **Tax RETURN Transcript** from the IRS website at http://www.irs.gov/Individuals/Order-a-Transcript. If parents currently live together and filed as "Married, filing separately", "Single", or "Head of Household" in 2021, both parents must request a Tax Return Transcript, (Call 800-908-4490 to obtain a TRDBV transcript if you were a victim of "Tax Administration Identity Theft") or

3). Submit photocopy or photocopies of **SIGNED** original 2021 1040(s) that were submitted to the IRS.

STUDENT'S TAX & INCOME INFORMATION (check only one box below)

A.) I have provided my 2021 U.S. Federal 1040 tax return using the IRS Data Retrieval Tool via the online FAFSA application **NOTE:** This is an option only if your IRS data was successfully transferred to your FAFSA or

B.) I have attached 1.) A copy of my 2021 U.S. Federal Tax RETURN Transcript from the IRS. (Account Transcripts are NOT accepted.)

2.) A copy of my 2021 SIGNED original 1040 tax return submitted to the IRS.

C.) I did not file and am not required to file. **If you did not work, enter \$0 for amount earned and "none" for employer.** If you worked but did not file any tax return, please list below your employer(s) and any earned income in 2021.

Employer(s) Complete this section if box C. is checked above.	2021 Amount Earned	Were you issued a W-2?	
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)

Attach a W-2 for each employer checked "Yes" above. Please provide an explanation below if W-2 cannot be provided.

PARENT'S TAX & INCOME INFORMATION (check only one box below unless parents filed separately)

A.) Parent(s) successfully transferred their income tax information to your FAFSA using the IRS Data Retrieval Tool (DRT) via the online FAFSA application **or**,

B.) Attached is 1.) A copy of parents' 2021 U.S. Federal **Tax RETURN Transcripts** from the IRS, (Account Transcripts are NOT accepted. **or** 2.) A photocopy or photocopies of their **SIGNED** original 2021 IRS 1040 tax return

C.) Attach an **IRS Letter of Non-Filing** and list below any employer (s) and any earned income in 2021. If parent(s) did not work, enter \$0 for amount earned and "none" for employer. The IRS Letter of Non-Filing is obtained by requesting a tax transcript from www.IRS.gov/ transcript. If the IRS website is not functioning, attach a letter signed by the parent, describing their attempts to secure this document.

Employer(s) This section must be completed if you checked box C. above	2021 Amount Earned	Were parents issued a W-2?	
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)
	\$	Yes (attached)	No (explain below)

Attach a W-2 for each employer checked "Yes" above. Please provide an explanation below if W-2 was not issued.

6. SIGN THIS WORKSHEET

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. At least one parent must sign.

Student

Date

Date

Parent

Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Return this form to: Student Financial Services | 12180 Park Ave. S. Tacoma, WA 98447 | phone: (253)535-7161 | FAX: (253)535-8406 | www.plu.edu/financial-services

IDENTITY & STATEMENT OF EDUCATIONAL PURPOSE

The student must complete **ONE** of the following tasks:

- 1. Appear in person at Pacific Lutheran University to verify his/her identity by:
 - **a.** Presenting a valid government-issued photo identification (ID), such as, but not limited to: a driver's license, other state-issued ID, or U.S. passport, and
 - **b.** sign, in the presence of a certified institutional official, the Statement of Educational Purpose below.

OR

2. If the student is unable to appear in person at Pacific Lutheran University to verify his/her identity, the student must provide the following:

a. A copy of a valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as, but not limited to: a driver's license, other state-issued ID, or U.S. passport; and

b. The original notarized Statement of Educational Purpose.

7. STATEMENT OF EDUCATIONAL PURPOSE Sign in the presence of a PLU official or a Notary Public

I certify that I ______ am the individual signing this Statement of Educational Purpose and that

the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending

Pacific Lutheran University for 2023-2024.

Student Signature

Date

Name of Institutionally Authorized Individual Reviewing ID

Date

8. NOTARY'S CERTIFICATE OF ACKNOWLEDGMENT (Complete notarization only if submitting this form by mail)

State of		
City/County of		
On, bef	ore me,	, personally appeared,
Date	Notary's Name	
		_, and provided to me on a basis of satisfactory evidence of identification
Printed name of signer		
		to be the above-named person who signed the foregoing instrument.
Type of Government-issued photo) ID provided	
WITNESS my hand and o	fficial seal	
Seal		
		Notary Signature
My commission expires on		
wry commission expires on	Date	

Return this form to: Student Financial Services | 12180 Park Ave. S. Tacoma, WA 98447 | phone: (253)535-7161 | FAX: (253)535-8406 | www.plu.edu/financial-services