



# Pacific Lutheran University

## 2019-2020 Verification Worksheet - Independent V5

*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 2019-20 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: \_\_\_\_\_ PLU ID #: \_\_\_\_\_

Student's email Address: \_\_\_\_\_ Student phone #: \_\_\_\_\_

<b>1. As of today: FAMILY/HOUSEHOLD &amp; COLLEGE INFORMATION (Check and respond to each box)</b>			
<p>List yourself</p> <p>List your spouse, if living together, regardless of marital status.</p> <p>List your children/step-children, even if they don't live with you <b>ONLY IF</b></p> <p>A. You will provide more than half of their support from July 1, 2019 through June 30, 2020, or</p> <p>B. Your child would be required to provide your information when applying for Federal Student Aid on the FAFSA. Do not include foster children in the household.</p> <p>List other people <b>if</b> they <u>now</u> live with you and you provide more than half of their support <b>and will continue</b> to provide more than half of their support from July 1, 2019 through June 30, 2020.</p>			
Name	Age	Relationship	College attending in 2019-20 (half time or more) <small>Do NOT include if Running Start or college in high school programs.</small>
	XXXX	Self	Pacific Lutheran University

If you need more space, attach a separate page.

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**2017 Income & Tax Documentation:** If you (and/or spouse, if applicable) were required to file a 2017 U.S. tax return, you have three options for providing this information to PLU:

- 1). The **Federal IRS Data Retrieval Tool (DRT)** process via the [www.fafsa.gov](http://www.fafsa.gov). This is the quickest and the preferred method. Follow the on-line instructions; Be sure that the FAFSA is signed with your FSA ID and password, otherwise the transfer will not be successful. If you are not eligible to use the DRT then you must obtain:
- 2). A **Tax Return Transcript** from the IRS website at <http://www.irs.gov/Individuals/Order-a-Transcript>. If you are currently married and filed as "Married, filing separately", "Single", or "Head of Household" in 2017, both you and your spouse must request a Tax Return Transcript. If you are a victim of "Tax Administration Identity Theft", you will need to call the IRS' Identity Protection Specialized Unity (IPSU) at 800-908-4490 to obtain a TRDBV transcript.
- 3). A photocopy of a **SIGNED ORIGINAL** of your (and your spouse, if currently married but filed separately) 2017 IRS 1040.

### STUDENT'S TAX & INCOME INFORMATION (check only one box below unless you have a spouse who filed separately)

A.) I have already successfully transferred my 2017 U.S. Federal tax return information (1040, 1040A, 1040EZ) using the IRS Data Retrieval Tool via the on-line FAFSA application **or**,

B.) I have attached either: 1.) A copy of my 2017 U.S. Federal **Tax RETURN Transcript(s)** (Not the Account Transcripts) or,  
2.) A photocopy or photocopies of a **SIGNED original(s)** of my/our 2017 IRS tax return 1040 **or**

C. Attach an **IRS Letter of Non-Filing** and listed below employer(s) and any earned income in 2017. If you (and spouse, if applicable) 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](http://www.irs.gov/transcript). If the IRS website is not functioning, attach a signed letter, describing your attempts to secure this letter.

Employer(s) <small>Complete this section if you checked box C. above</small>	2017 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 was not issued.

### 5. 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

Spouse

Date

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

## 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 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 passport; and
  - b. The original notarized Statement of Educational Purpose.

### 6. STATEMENT OF EDUCATIONAL PURPOSE

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 2019-2020.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Institutionally Authorized Individual Reviewing ID

\_\_\_\_\_  
Date

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

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before 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 official seal**

Seal

\_\_\_\_\_  
Notary Signature

My commission expires on \_\_\_\_\_  
Date