



# Pacific Lutheran University

## 2020-2021 Verification Worksheet - Independent V1

*Your FAFSA has been selected by the Federal Student Aid processor for a review process called verification. Therefore, Financial aid program regulations (34 CFR, Part 668) requires PLU to check the accuracy of information provided on your 2020-21 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 #: \_\_\_\_\_

**1. As of today, FAMILY/HOUSEHOLD & COLLEGE INFORMATION (check and respond to each box)**

- List yourself
- List your spouse, if currently living together.
- List your children/step-children, even if they don't live with you, **ONLY IF**
  - A. You will provide more than half of their support from July 1, 2020 through June 30, 2021, or
  - B. The 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.
- List other people **ONLY 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, 2020 through June 30, 2021.

| Name | Age  | Relationship           | College attending in 2020-21 (half time or more)<br><small>Do NOT list college if in Running Start or college in high school program.</small> |
|------|------|------------------------|---|
|      | XXXX | Self                   | Pacific Lutheran University   |
|      |      | Spouse (if applicable) |   |
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If you need more space, attach a separate page.

Continue on the reverse side.

## 2020-2021 Verification Worksheet - Independent V1 (page 2)

**2018 Income & Tax Documentation:** If you (and/or your spouse, if applicable) were required to file a 2018 U.S. tax return, you have three options for providing this information to PLU:

- 1.) If you successfully transferred your tax information via the **IRS Data Retrieval Tool (DRT)** process when you filed your FAFSA, you are done. If you did not, return to your on-line FAFSA and use the DRT to satisfy this requirement **or**,
- 2.) Submit a **Tax Return Transcript** from the IRS website. If you included a spouse in your household in question #1, but filed as "Married, filing separately" as "Single" or "Head of Household" in 2018, both you and your spouse must provide a Tax Return Transcript (Note: A tax account transcript is NOT acceptable) **or**
- 3.) Submit a photocopy of your **SIGNED** original 1040(s) that you submitted to the IRS.

If you encounter any difficulties in securing your tax documentation contact us for assistance at [sfs@plu.edu](mailto:sfs@plu.edu).

### 2. STUDENT'S TAX & INCOME INFORMATION (check only one box unless a spouse's tax return was filed separately)

A. I have provided my 2018 U.S. Federal tax return information using the **IRS Data Retrieval Tool (DRT)** via the on-line FAFSA application. If you did not and are eligible to use the DRT, you can still return to the FAFSA and utilize this option, **or**

B. Attached is either: 1.) A copy of my 2018 U.S. Federal **Tax Return Transcript(s)** downloaded from the IRS, or  
2.) A photocopy or photocopies of **SIGNED** original IRS 1040(s), **or**

C. Attach an **IRS Letter of Non-Filing** and list below any employer (s) and any earned income in 2018. 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) <span style="color: red;">You must completed this section if you checked C. above</span> | 2017 Amount Earned | W-2 Attached?   |
|--|--------------------|---|
|  | \$                 | <input type="checkbox"/> Yes <input type="checkbox"/> No, explain below |
|  | \$                 | <input type="checkbox"/> Yes <input type="checkbox"/> No, explain below |
|  | \$                 | <input type="checkbox"/> Yes <input type="checkbox"/> No, explain below |
|  | \$                 | <input type="checkbox"/> Yes <input type="checkbox"/> No, explain below |
|  | \$                 | <input type="checkbox"/> Yes <input type="checkbox"/> No, explain below |
|  | \$                 | <input type="checkbox"/> Yes <input type="checkbox"/> No, explain below |

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

### 4. SIGN THIS WORKSHEET

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct. If spouse is included in the household, their signature is also required.

Student \_\_\_\_\_

Date \_\_\_\_\_

Spouse (if applicable) \_\_\_\_\_

Date \_\_\_\_\_

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