

2020-2021 Verification Worksheet - Independent V5 (page 2)

2018 Income & Tax Documentation: If you (and/or spouse, if applicable) were required to file a 2018 U.S. tax return, the U.S. Department of Education sanctions only two options for providing this information to PLU:

- 1). The **Federal IRS Data Retrieval Tool** (DRT) process via the 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 2018, 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 Unit (IPSU) at 800-908-4490 to obtain a TRDBV transcript.

If you encounter any difficulties in securing your tax documentation contact us for assistance at sfs@plu.edu.

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

- A.) I have already provided my 2018 U.S. Federal tax return information (1040, 1040A, 1040EZ) using the IRS Data Retrieval Tool via the on-line FAFSA application. If the DRT was not used, go to www.irs.gov/transcripts and do either B. or C. below:
- B.) Download and submit a copy of my 2018 U.S. Federal **Tax RETURN Transcript** (Not the Account Transcripts) **or** provide a photocopy of a signed original 1040 tax return you filed with the IRS, **or**
- C.) If you worked but did not file, please list below your employer(s) and any earned income in 2018. **If you did not work, enter \$0 for amount earned and "none" for employer.**

Employer(s) <small>Complete this section if you checked box C. above</small>	2018 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.

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 2020-2021.

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