



Pacific Lutheran University

2023-2024 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 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 your spouse, if currently living together

List your children/step-children living with you. If they don't live with you, include them ONLY IF:
 A. You 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 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, 2023 through June 30, 2024.

Name	Age	Relationship	College attending in 2023-24 (half time or more) <small>Do NOT include if in Running Start or college in high school programs.</small>
	XXXX	Self	Pacific Lutheran University
	XXXX	Spouse (if applicable)	

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

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

6. SIGN THIS WORKSHEET

By signing this worksheet, we certify that all the information reported on this worksheet is complete and correct.

Student	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 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 _____, 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