

2023-2024 Verification Worksheet - Independent V1 (page 2)

2021 Income & Tax Documentation: If you (and/or your spouse, if applicable) 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 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 online 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 2021, 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.

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

- A. I have provided my 2021 U.S. federal tax return information using the **IRS Data Retrieval Tool (DRT)** via the online FAFSA. If you did not but are eligible to use the DRT, you can still return and make corrections to your FAFSA and utilize this option, **or**
- B. Attached is either: 1.) A copy of my 2021 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 2021. 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. If the IRS website is not functioning, attach a signed letter, describing your attempts to secure this letter.

| Employer(s) You must completed this section if you checked C. above | Amount Earned | 2021 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.

Submit documents to SFS by uploading documents to our secure portal at <https://etcentral.plu.edu/#/form/19>. (PLU ePass is required) OR via fax 253-535-8406 or U.S. Postal Service. Documents CANNOT be accepted if sent via email and will be deleted.