

6965 Cumberland Gap Parkway

Harrogate, TN 37752 Phone: 423.869.6336 Fax: 423.869.6347

2024-2025 V5 Dependent Verification Worksheet

<u>What is Verification?</u> – The Department of Education randomly selects a percentage of students for verification. Before awarding Federal Student Aid, we must collect documentation to verify the information reported on your FAFSA. We may correct your FAFSA based on your provided documentation if there are discrepancies. During the verification process, it may be determined that additional documents are needed.

<u>Instructions:</u> Read this worksheet thoroughly and answer all questions. Your student ID number can be found in MyLMU > "Self Service Menu" > "WebAdvisor for Students" > "My Profile." Return the worksheet and all requested documentation to the Office of Student Financial Services as soon as possible to prevent financial aid processing delays.

As part of federal student aid eligibility, students and parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2022 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using the income and tax information directly from the IRS.

If 2022 income tax information for the student or parent was not available or could not be used, the student and/or parent should provide the institution with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.

A 2022 IRS Tax Return Transcript may be obtained through:

- <u>Get Transcript by Mail</u> Go to <u>www.irs.gov</u>, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- <u>Get Transcript Online</u> Go to <u>www.irs.gov</u>, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript is displayed online upon successful completion of the IRS's two-step authentication.
- <u>Automated Telephone Request</u> 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

A. Student Information				
Student Name			Date of Birth	LMU Student ID Number
Address				
City	State	Zip	Pho	ne (include area code)

tudent Name:	Student ID #:	Dependent V5				
B. Family Size						
ist the people in <u>your parent's househol</u>	<u>d</u> , including:					
The student.	_					
because of separation or divorce. Include	a parent on active duty in the U.S	a parent who has died or is not living in the household S. Armed Forces apart from the family.				
	ents (or live apart because of colle					
The state of the s	neir support from the student's pare re than half of their support from	arents, and the student's parent(s) from July 1, 2024, through				
Other persons if the following are true: They live with the student's pare 	nnts					
	neir support from the student's pa	arents and				
The state of the s		the student's parent(s) from July 1, 2024, through				
	ax return if the parent were to file	e requirement that family size align with whom the a U.S. tax return at the time of completing the 2024-				
Provide a separate page with the student's na	·	·				
Full Legal Name	Age	Relationship				
		Self				
C. Student Tax Information						
1. Did you (the student) file a 2022 Federal	Tax Return?					
	☐ YES. While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax					
documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript <u>OR</u> a signed copy of						
your 2022 Federal Tax Return along with <u>ALL</u> applicable schedules. <i>(Skip to section D.)</i> NO, I did not, will not, and was not required to file a 2022 income tax return with the IRS. <i>(Must answer question 2 and sign.)</i>						
-, -:, 						
TAX RETURN NON-FILERS ONLY — Complete this section if you (the student) will not file and are not required to file a 2022 income tax						
return with the IRS. Check the box that applies: I was not employed and had no income earned from work in 2022.						
☐ I was not employed and had no income earned from work in 2022. ☐ I was employed in 2022. Please complete the table below and attach copies of all W-2s. List every employer,						
even if the employer did not issue a W-2 form. (Attach another sheet if additional space is needed.)						
Income earned from wo	Income earned from work: Use the W-2 or other earnings statements (Non-tax filers only)					
Employer(s) Name	2022 Amount Earned	W-2 Attached?				
	\$					
	\$					

Stu	dent Name:	Student ID #:		Dependent V5
D.	Parent Tax Information (this section appli	ies to each parent included in the family size in sec	tion B)	
PAR	ENT 1 INFORMATION			
Pare	ent 1 Name:			
1.	documents are needed. If the FA-DDX tran your 2022 Federal Tax Return along with <u>A</u>	urn? ou consented and the FA-DDX pulled over ynsfer was ineffective, you must submit a 20 <u>ALL</u> applicable schedules. <i>(Skip to Parent 2</i> quired to file a 2022 income tax return with	22 IRS Tax Return <i>Information, if ap</i>	Transcript <u>OR</u> a signed copy of <i>plicable.)</i>
2.	even if the employer did not issue a W	d no income earned from work in 2022. lease complete the table below and attach 1-2 form. (Attach another sheet if additiona	copies of all W-2s.	List every employer,
		ork: Use the W-2 or other earnings statem		
	Employer(s) Name	2022 Amount Earned \$	W-2	Attached?
		\$		
	Signature of Parent 1 (only if tax return no	n-filer):	Da	te:
PAR	ENT 2 INFORMATION (if applicable)			
Pare	ent 2 Name:			
	documents are needed. If the FA-DDX tran your 2022 Federal Tax Return along with <u>A</u>	ou consented and the FA-DDX pulled over ynsfer was ineffective, you must submit a 20 ALL applicable schedules. (Skip to section Exquired to file a 2022 income tax return with	22 IRS Tax Return .)	Transcript <u>OR</u> a signed copy of
2.	even if the employer did not issue a W	d no income earned from work in 2022. ease complete the table below and attach /-2 form. (Attach another sheet if additiona	copies of all W-2s.	List every employer,
		ork: Use the W-2 or other earnings statem		
	Employer(s) Name	\$ 2022 Amount Earned	VV-2	Attached?
		\$		
	Signature of Parent 2 (only if tax return no	n-filer):	Da	te:
Ε.	Certifying Signatures			
perso has b	person signing below certifies that all the information also understands that if any of the information repen reported on the FAFSA, additional documentat false or misleading information on this worksheet, y	eported on this form is inconsistent with what ion may be required. WARNING: If you purposely	Mail to: Linco Offic 6965	PRETURN THIS FORM: oln Memorial University e of Student Financial Services Cumberland Gap Parkway
St	udent Signature (Legal Name)	Date	In Person: Office	ogate, TN 37752 e of Student Financial Services -Whitford Hall – Main Campus
Pa	rent Signature (Legal Name)	Date		

Student Name:	Studen	t ID #:		Dependent V5
F. Identity/Statement of Education	nal Purpose			
Instructions: Read this worksheet thoroug Menu" > "WebAdvisor for Students" > "M Financial Services) to verify their identity b limited to, a driver's license, other state-is the institution with the date it was receive addition, the student must sign, in the pre	y Profile." The student must a by presenting an unexpired va sued ID, or passport. The inst ad and reviewed and the name	ppear in person at Lincoln l lid government-issued pho itution will maintain a copy e of the official authorized t	Memorial to identifice of the student of the studen	University (Office of Student cation (ID), such as, but not udent's photo ID annotated by and review the student's ID. In
If the student is <u>unable to appear in perso</u> signed and notarized Statement of Educat acknowledged in the notary statement be	ional Purpose along with a co	py of the unexpired valid go	overnmen	t-issued photo ID that is
Student Information				
Student Name	Date of Birth	LMU Student ID Numb	er	Phone (include area code)
Address	City		State	Zip
Statement of Educational Purpose	,		,	
Purpose and that the Federal student fir cost of attending Lincoln Memorial Univ		ive will only be used for e	ducationa	al purposes and to pay the
Student's Signature		Date Student's ID Num		ımber (Required)
Notary Certificate of Acknowledgm (Notary signature/seal required if the stud	lent is not providing informati	on in person. Notaries can	often be f	ound at local banks, credit
unions, insurance agencies, or shipping sto				
On, before me,	(Date) (Notary's Name)			Notary Seal
personally appeared,(Printe because of satisfactory evidence of identif	ication			
to be the above-named person who signed WITNESS my hand and official seal	(Type of unexpired governing the foregoing instrument.	ment-issued photo ID provided)		
(Notary Signature)	My commission expires or	(Date)		
Office Use Only				
Official's Name:	Official's Signature:			_ Date: