

6965 Cumberland Gap Parkway

Harrogate, TN 37752 Phone: 423.869.6336 Fax: 423.869.6347

## 2024-2025 V5 Independent Verification Worksheet

What is Verification? – 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.

Instructions: 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 spouses (as appropriate) 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 student and spouse 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 spouse, if applicable) was not available or could not be used, the student 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
		<u>.</u>	•
Address			
City	State	Zip	Phone (include area code)

Student Name:		Student ID #:		Independent V5		
B. Family Size						
B. Fairing Size						
List the people in <u>your household</u> , i	ncluding:					
The student.						
<ul> <li>The student's spouse, if applicable.</li> </ul>						
·	student's dependent children if the following are true:					
<ul> <li>They live with the student</li> </ul>		_				
They receive more than ha				2024 1		
		t their support fro	om the student from July 1,	2024, through June 30, 2025.		
<ul> <li>Other persons if the following are t</li> <li>They live with the student</li> </ul>						
<ul><li>They live with the student,</li><li>They receive more than ha</li></ul>		om the student	and			
	• •			2024, through June 30, 2025.		
The provided criteria for "dependent ch student could claim as a dependent on 2024-2025 FAFSA. As a result, the stude	a U.S. tax return if the nt should not includ	ne student were t le any unborn chi	o file a U.S. tax return at the ldren in the family size.	e time of completing the		
Provide a separate page with the studer	it's name and ID nui	1	-			
Full Legal Name		Age		tionship		
			9	Self		
			-			
C. Student Tax Information						
	adaral Tay Datura					
_ ' '	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-DD	•	•				
your 2022 Federal Tax Return along		•				
$\square$ <b>NO</b> , I did not, will not, and was r	ot required to file a 2	2022 income tax re	eturn with the IRS. <i>(Must ans</i>	wer question 2 and sign.)		
	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	• •	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 fro	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?		
	\$					
	\$					
Signature of Student (only if tax retu	ırn non-filer)·		Date			
6			Datc	•		

Student Name:		Student ID #:			Independent V5
D.	. <b>Spouse Tax Information</b> (if applicab	le)			
Spo	use Name:				
1.	Did the student's spouse file a 2022 Fe YES. While completing the FAFSA, if documents are needed. If the FA-DDX tr your 2022 Federal Tax Return along with NO, I did not, will not, and was not re	you consente ansfer was in ALL applicat	ed and the FA-DDX pulled over effective, you must submit a 20 ole schedules. <b>(Skip to section L</b>	D22 IRS Tax Return Ti E. <b>)</b>	ranscript <u>OR</u> a signed copy of
2.	TAX RETURN NON-FILERS ONLY — Comple		on if the spouse will not file and	d is not required to fi	le a 2022 income tax return
	with the IRS. Check the box that applies  I (the spouse) was not employed and I (the spouse) was employed in 2022 even if the employer did not issue a	l had no inco . Please com	plete the table below and atta	•	. List every employer,
	Income earned from v	vork: Use th	e W-2 or other earnings stater	nents <u>(non-tax filers</u>	only)
	Employer(s) Name	\$ \$	2022 Amount Earned	W-2 A	attached?
_	Signature of Spouse (only if tax return n	on-filer):		Date:	:
By s	certifying Signature signing below, I (the student) certify that al of the information reported on this form i required. WARNING: If you purposely give h.	s inconsisten	t with what has been reported	on the FAFSA, additi	onal documentation may
S	tudent's Signature			Date	
		Mail to: In Person:	TO RETURN THIS FORM:  Lincoln Memorial University Office of Student Financial Services 6965 Cumberland Gap Parkway Harrogate, TN 37752  Office of Student Financial Services DAR-Whitford Hall – Main Campus		

Student Name:	S1	udent ID #:		Independent V5	
F. Identity/Statement of Educat	tional Purpose				
Instructions: Read this worksheet thor Menu" > "WebAdvisor for Students" > Financial Services) to verify their identi limited to, a driver's license, other stat the institution with the date it was rec- addition, the student must sign, in the	"My Profile." The student rity by presenting an unexpi e-issued ID, or passport. The eived and reviewed and the	must appear in person at Lincoln red valid government-issued pho ne institution will maintain a cop e name of the official authorized	Memorial Unit oto identification of the student to receive and	versity (Office of Student on (ID), such as, but not it's photo ID annotated by review the student's ID. In	
If the student is <u>unable to appear in persigned and notarized Statement of Edu</u> acknowledged in the notary statement  Student Information	ucational Purpose along wit	h a copy of the unexpired valid g	government-iss	ued photo ID that is	
Chudant Nama	Date of Divide	LBALL Chindon's ID Nive	hau Dha	ne (include area code)	
Student Name	Date of Birth	LMU Student ID Num	per Pho	ne (include area code)	
Address		City	State	Zip	
Statement of Educational Purpo	ose				
Purpose and that the Federal studen cost of attending Lincoln Memorial L		am the individual sign	_		
Student's Signature		Date Stude		ent's ID Number (Required)	
Notary Certificate of Acknowled (Notary signature/seal required if the sunions, insurance agencies, or shipping	student is not providing info	ormation in person. Notaries car	often be found	d at local banks, credit	
State of:	City/County of: _				
On, before me	, before me, (Date) (Notary's Name)			Notary Seal	
personally appeared,	Printed Name of Signer	, and proved to me		Notary Scal	
because of satisfactory evidence of ide	entification				
to be the above-named person who sig WITNESS my hand and official seal		government-issued photo ID provided) ent.			
WITNESS my hand and official seal	gned the foregoing instrum				
·	gned the foregoing instrum	ent. ires on			