



**Financial Aid Office**  
**2023-2024 V5 Dependent Verification Worksheet**

**V5** Aggregate  
 Verification

Your application was selected for review in a process called "Verification". In this process, the financial aid office will compare information from your FAFSA with your 2021 IRS tax information. The law gives the college the right to ask you for this information before awarding financial aid. If there is a difference between your FAFSA and the information you list on this form, the college will make a correction to your FAFSA electronically. The financial aid office cannot process your financial aid application without this information. **Complete all sections with BLACK ink. If a section does not apply to you write "NA". Return this form as soon as possible, preferably 6 weeks prior to the start of the quarter you plan to begin attending. Please note: it takes a minimum of 3-6 weeks to process financial aid from the date your file is complete and all required documents have been submitted.**

Return this form to:

LCC Financial Aid Office  
 1600 Maple St. / P.O. Box 3010  
 Longview, WA 98632

Phone: 360-442-2390  
 Fax: 360-442-2379

**Step 1: Student Information**

FAO Use: \_\_\_\_\_

**Last Name:** \_\_\_\_\_ **First Name:** \_\_\_\_\_ **MI:** \_\_\_\_\_

**LCC ID #:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

**Step 2: Family Information**

FAO Use: \_\_\_\_\_

**You are a dependent student if you were required to provide parental information on the FAFSA.**

List the people in your parent(s)' household including:

- yourself and your parent(s) (including a stepparent) even if you don't live with your parents and
- your parent's other children, even if they do not live with your parent(s), if your parents will provide more than half of their support from July 1, 2023-June 30, 2024, or the children would be required to provide parental information if they were applying for Federal Student Aid, and
- other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2023-June 30, 2024.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College	Will be Enrolled at least Half Time (Yes or No)
		<i>Self/Student</i>	<i>Lower Columbia College</i>	

**Step 3: Student/Spouse – Tax and Income Information**

FAO Use: \_\_\_\_\_

3A. These requirements apply to both the student and current spouse, in the household. Check applicable boxes below.

I/spouse used the IRS Data Retrieval Tool (DRT) when submitting the FAFSA and did not change the numbers. You are not required to submit an IRS Tax Transcript and W2's.

I/spouse did not use the DRT and have attached:

a signed copy of my 2021 IRS Tax form 1040 and Schedules 1, 2, and 3, if filed, that was sent to the IRS

OR

a copy of my 2021 IRS Tax Transcript and Schedules 1, 2, and 3, if filed, that was received from the IRS. You are not required to submit W2's.

I/spouse will not file and are not legally required to file a 2021 IRS Income Tax Return per IRS rules:

List your/your spouse's employers(s), all income received in 2021 below, and

Attach all of your/your spouse's 2021 W2's received, and

Attach IRS Verification of Non-filing status (independent students only). If your/your spouse's income exceeds the threshold required by law to file, you are required to file a tax return before we can process your financial aid.

Employer's Name	IRS W2 Provided (Yes or No)	Amount Earned in 2021
		\$
		\$
		\$
		\$

3B. Rollovers of IRA's, Pensions, and Annuities: If you or your spouse's employment ended, you may have had the option to "roll over" your 401k or retirement plan to a personal IRA or Roth IRA, pension, or annuity plan. The rollover amounts should not be counted as income or untaxed income on the FAFSA. We calculate the amount of rollover by using the difference between 4a/4b and 5a/5b of IRS Form 1040. Does your 2021 IRS Form 1040 Line 4a include a rollover of an IRA, Pension, or Annuity?

Yes       No

Amount from line 4a \$ \_\_\_\_\_

Amount from line 4b \$ \_\_\_\_\_

Amount from line 5a \$ \_\_\_\_\_

Amount from line 5b \$ \_\_\_\_\_

**Step 4: Parent(s)' – Tax and Income Information**

FAO Use: \_\_\_\_\_

4A. These requirements apply to both parents and step-parents, in the household. Check applicable boxes below.

- Parent(s) used the IRS Data Retrieval Tool (DRT) when submitting the FAFSA and did not change the numbers. You are not required to submit an IRS Tax Transcript and W2's.
- Parent(s) did not use the DRT and have attached:
  - a signed copy of my 2021 IRS Tax form 1040 and Schedules 1, 2, and 3, if filed, that was sent to the IRS

OR

  - a copy of my 2021 IRS Tax Transcript and Schedules 1, 2, and 3, if filed, that was received from the IRS. You are not required to submit W2's.
- Parent(s) will not file and are not required to file a 2021 IRS Income Tax Return.
  - List your employers(s), all income received in 2021 below, and
  - Attach all 2021 W2's received, and
  - Attach IRS Verification of Non-filing status. If your income exceeds the threshold required by law to file, you are required to file a tax return before we can process financial aid.

Employer's Name	IRS W2 Provided (Yes or No)	Amount Earned in 2021
		\$
		\$
		\$
		\$

4B. Rollovers of IRA's, Pensions, and Annuities: If you or your spouse's employment ended, you may have had the option to "roll over" your 401k or retirement plan to a personal IRA or Roth IRA, pension, or annuity plan. The rollover amounts should not be counted as income or untaxed income on the FAFSA. We calculate the amount of rollover by using the difference between 4a/4b and 5a/5b of IRS Form 1040. Does your 2021 IRS Form 1040 Line 4a include a rollover of an IRA, Pension, or Annuity?

- Yes       No

Amount from line 4a \$ \_\_\_\_\_

Amount from line 4b \$ \_\_\_\_\_

Amount from line 5a \$ \_\_\_\_\_

Amount from line 5b \$ \_\_\_\_\_

Student Name: \_\_\_\_\_ LCC ID: \_\_\_\_\_

**Step 5: Student – Identity Verification**

FAO Use: \_\_\_\_\_

- I am appearing in person at Lower Columbia College with my original, unexpired, and valid government-issued photo identification (driver's license, state identification card, or passport). The Financial Aid office is required to make a copy.
- I am unable to appear in person. I am attaching a notarized copy of my unexpired and valid government-issued photo identification (driver's license, state identification card, or passport).

**Step 6: Student – Statement of Educational Purpose**

FAO Use: \_\_\_\_\_

- I am appearing in person at Lower Columbia College to sign the statement below (you **must** sign statement in front of financial aid staff).
- I am unable to appear in person to submit this statement and have had the statement notarized. LCC does not reimburse for any fees associated in the notarizing process.

I, certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that  
(Print Student's Name)

the Federal student assistance I may receive will only be used for educational purposes and to pay the cost of attending Lower Columbia College for 2023-2024.

Student Signature

Date

Student's ID Number

**Notary Use Only (Only use if not appearing in person to the Financial Aid Office)**

State of \_\_\_\_\_

City/County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_,  
(Date) (Print Notary's name)

personally appeared, \_\_\_\_\_, and proved to me  
(Printed name of signer)

because of satisfactory evidence of identification \_\_\_\_\_  
(Type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal (seal) \_\_\_\_\_  
(Notary signature)

My commission expires on \_\_\_\_\_  
(Date)

**Step 7: Sign the Worksheet**

FAO Use: \_\_\_\_\_

By signing this worksheet, I (we) certify that all information reported on this worksheet is complete and correct. The student must sign and date. If you are a dependent student, the parent whose information is reported on the FAFSA must also sign and date. **Warning: if you purposely give false or misleading information you may be fined, be sentenced to jail, or both.**

Student Signature

Date

Parent Signature

Date

**STUDENT:** If you are submitting notarized documents, the original notarized documents must be mailed to LCC.

FAO USE: If appearing in person, student must sign in front of LCC staff. All issues with identity and HS completion must be reported to the Dept. of Education for purposes of tracking fraud. Notify the financial aid director if there are issues verifying identity or HS completion.

Received by:

Date:

## IRS Instructions

### Tax Filers

You may be able to import your IRS information directly into your FAFSA using the Data Retrieval Tool (DRT). If you are able to import your IRS information directly into your FAFSA, you are not required to submit a signed IRS Tax form 1040 and Schedules 1, 2, and 3, if filed, to the LCC Financial Aid Office. If you have already submitted your FAFSA, you may still be able to import your IRS information by logging back into your FAFSA, click the Financial Information Tab and follow the on-screen instructions to transfer your IRS information into your FAFSA.

### Using the Internal Revenue Service (IRS) Data Retrieval Tool When Completing a FAFSA

1. What is the IRS Data Retrieval Tool (DRT)?
  - The DRT allows students and parents to retrieve their tax information from the IRS, if a tax return was filed, and avoid manually entering this information on the FAFSA.
  - Students and parents of dependent students will need to retrieve their IRS information separately when completing the FAFSA.
2. Why should I use the DRT?
  - Using the DRT will shorten the amount of time it will take you to complete your FAFSA.
  - Students and/or parents who import their tax data are NOT required to provide a copy of their IRS Tax Return Transcript for verification. This simplifies the verification process and allows the financial aid office to award students much quicker.
3. Can anyone use the DRT? No, the DRT is not available in the following situations:
  - The student/parent is married and either the student/parent or his/her spouse filed as Married Filing Separately or Head of Household.
  - The parents' marital status is "Unmarried and both legal parents living together."
  - The student/parent filed a Puerto Rican or foreign tax return.
  - Taxes filed within the last three weeks, if filing electronically, or 6-8 weeks after filing by paper/mail. It could take longer depending on peak IRS processing times.
4. I or my parents was unable to use the DRT, what do I do now?
  - You/your spouse and/or parents must enter your income information manually, AND
  - Per Department of Education rules, you/your spouse and/or parents are required to provide a copy of your IRS Tax Transcript (not account transcript) for verification.

### Obtaining a copy of your Tax Information

If you are unable to locate a copy of your IRS Tax Form 1040 and Schedules 1, 2, and 3 that were sent to the IRS you must request an IRS Tax Transcript. To request an IRS Tax Transcript or Statement of non-filing for parents and independent students who did not file (this is not required for dependent students)

- Visit the [IRS website](http://www.irs.gov) at [www.irs.gov](http://www.irs.gov) and click on "Get a Tax Transcript", OR
- Complete IRS Form 4506-T available on the [IRS website](http://www.irs.gov) at [www.irs.gov](http://www.irs.gov) and mail or fax per form instructions, OR
- Call the IRS toll free at 1-800-829-1040.