



# 2023-24 DEPENDENT VERIFICATION WORKSHEET

V1 - Standard Verification

Your FAFSA application was selected by the Department of Education for a process called *Verification* at Lower Columbia College (LCC). The Financial Aid Office will compare information from your FAFSA application with your 2021 tax information. If there is a difference between the information on your FAFSA and the information listed on your taxes or this form, the college will make a correction(s) to your FAFSA application electronically. The Financial Aid Office cannot process your financial aid without this information.

## IMPORTANT INFORMATION

- All sections of this form must be completed. If a section does not apply to you, write "NA".
- The Financial Aid Office publishes a [quarterly priority deadline](#) and submission of this document after this date may cause a delay in receiving your aid. Return this form as soon as possible.
- It takes a minimum of 3-6 weeks to fully process students financial aid from the date all required documents have been submitted to the Financial Aid Office.

STUDENT INFORMATION	
Last Name:	First Name:
Student ID #:	Email:

## STEP 1: FAMILY INFORMATION

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
- Any 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, please attach a separate page.

Full Name	Age	Relationship to Student?	College/University Name (Please spell out name of school)	Will be enrolled at least half-time? (Yes or No)
		<i>Self/Student</i>	<i>Lower Columbia College</i>	



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## STUDENT INFORMATION

Student Name:	Student ID #:
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## STEP 2: STUDENT – TAX AND INCOME INFORMATION

These requirements apply to the student. Check **ALL** applicable boxes below:

- I 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 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 will not file and am not legally required to file a 2021 IRS Income Tax Return per IRS rules
  - List your employers(s), all income received in 2021 below attach all of your 2021 W2's received
  - NOTE:** If your 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
		\$
		\$
		\$
		\$
		\$
		\$

### Student Rollovers of IRA's, Pensions, and Annuities

If your 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 and 4b 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 5a \$ _____
Amount from line 4b \$ _____	Amount from line 5b \$ _____



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## STUDENT INFORMATION

Student Name:	Student ID #:
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## STEP 3: PARENT(S)' – TAX AND INCOME INFORMATION

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
  - 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
		\$
		\$
		\$
		\$

**Parent 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 and 4b 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 5a \$ _____
Amount from line 4b \$ _____	Amount from line 5b \$ _____

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's Signature: \_\_\_\_\_ Date: \_\_\_\_\_



Parent's Signature: \_\_\_\_\_ Date: \_\_\_\_\_





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## 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 LCC's 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 and click the Financial Information Tab. 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. If 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 Return Transcript. To request an *IRS Tax Return Transcript* or *Statement of Non-Filing* follow the steps below. NOTE: A *Statement of Non-Filing* is only required for parents and Independent students who did not file. It is NOT required for Dependent students.

- Visit the IRS website 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 at [www.irs.gov](http://www.irs.gov) and mail or fax per form instructions.
- Call the IRS toll free at 1-800-829-1040.