2023-24 INDEPENDENT VERIFICATION WORKSHEET

V5 - Aggregate 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

- **Step 4 of this form must be completed IN-PERSON at either LCC's Financial Aid Office / One-Stop Center – OR – in the presence of a notary, returning the original (wet-signed) document to the Financial Aid Office / One-Stop Center. Electronic copies/signatures are NOT acceptable.**
- 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.

RETURN THIS FORM TO:

LCC Financial Aid Office
1600 Maple St. / P.O. Box 3010
Longview, WA 98632
Phone: (360) 442-2390

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

STEP 1: FAMILY INFORMATION

You are an Independent student if you were NOT required to provide parental information on the FAFSA.

List the people in your household including:

- Yourself and your spouse if you have one.
- Your child(ren), if you will provide more than half of their support from July 1, 2023-June 30, 2024, even if they do not live with you, or if the child(ren) would be required to provide your information as the parent if they were applying for Federal Student Aid.
- Any other people if they now live with you **AND** you 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, 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)
		Self/Student	***Lower Columbia College***	Select
				Select
				Select
				Select
				Select

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STUDENT INFORMATION	
Student Name:	**Student ID #:**

STEP 2: STUDENT/SPOUSE – TAX AND INCOME INFORMATION

These requirements apply to both the student and current spouse in the household. Check **ALL** 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.
- Attach IRS Verification of Non-filing status.
- 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
	Select	$
	Select	$
	Select	$
	Select	$
	Select	$
	Select	$

Student/Spouse Rollovers of IRA's, Pensions, and Annuities

If you or your spouse's employment ended, you may have had the option to "rollover" 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 $ ________________**

Attach Required Documents

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STUDENT INFORMATION	
Student Name:	**Student ID #:**

STEP 1: STUDENT – IDENTITY VERIFICATION

☐ 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.

– OR –

☐ I live more than 50 miles from campus **AND** will be attending online classes only and therefore am unable to appear in person. I am attaching the original notarized copy of my unexpired and valid government-issued photo identification (driver's license, state identification card, or passport).

STEP 2: STUDENT – STATEMENT OF EDUCATIONAL PURPOSE

☐ I am appearing in person at Lower Columbia College to sign the statement below (you must sign statement in front of financial aid staff).

– OR –

☐ I am unable to appear in person to submit the above statement and have had the statement notarized (see next page). 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 Full Name)

the federal student financial 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's Signature: ____ **Date:**__________________________

MUST SIGN IN FRONT OF FINANCIAL AID OFFICE STAFF OR NOTARY

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STUDENT INFORMATION	
Student Name:	**Student ID #:**

Notary Use Only (Only use if NOT appearing in person at 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 3: SIGN THE WORKSHEET

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:**___________________________

NOTE: 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 must be reported to the Department of Education for purposes of tracking fraud. Notify the Financial Aid Director if there are issues verifying identity.	Received by:	Date:

Lower Columbia College provides equal opportunity in education and employment and does not discriminate on the basis of race, color, national origin, citizenship or immigration status, age, perceived or actual physical or mental disability, pregnancy, genetic information, sex, sexual orientation, gender identity, marital status, creed, religion, honorably discharged veteran or military status, or use of a trained guide dog or service animal as required by Title VI of the Civil Rights Act of 1964, Title VII of the Civil Rights Act of 1964, Title IX of the Educational Amendments of 1972, Sections 504 and 508 of the Rehabilitation Act of 1973, the Americans with Disabilities Act and ADA Amendment Act, the Age Discrimination Act of 1975, the Violence Against Women Reauthorization Act and Washington State's Law Against Discrimination, Chapter 49.60 RCW and their implementing regulations. All inquiries regarding compliance with Title IX, access, equal opportunity and/or grievance procedures should be directed to Vice President of Foundation, HR & Legal Affairs, 1600 Maple Street, PO Box 3010, Longview, WA 98632, title9@lowercolumbia.edu, Phone number, (360) 442-2120, Phone number/TTY (800) 833-6388. Form Revised 03.14.24

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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 to retrieve their tax information from the IRS, if a tax return was filed, and avoid manually entering this information on 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, 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 is married and either the student or his/her spouse filed as Married Filing Separately or Head of Household.
    - The student 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 must enter your income information manually, AND
    - Per Department of Education rules, you/your spouse 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 and click on "Get a Tax Transcript".
  – OR –
- Complete IRS Form ***4506-T*** available on the IRS website at www.irs.gov and mail or fax per form instructions.
- Call the IRS toll free at 1-800-829-1040.