Office of Financial Aid
go.lclark.edu/verification

Lewis & Clark College

2023-2024 Dependent Verification Worksheet

Student Legal Name (First & Last)	Lewis & Clark ID	Student Email Address

Family Information

The following people should be counted in your parent(s)' household:

- **Yourself** (the student).
- **Your parent(s), read below for clarification:**
  - o If both legal (biological or adoptive) parents live together, regardless of marital status or gender, include both parents on the list.
  - o If biological or adoptive parents are divorced/separated, list your custodial parent. **If custodial parent has remarried, include your stepparent on the list.**
- **Your parent(s)' other children** (including biological, adoptive, stepchild(ren), and/or foster in some circumstances) if
  - o your parent(s) will provide more than half of their support from July 1, 2023 – June 30, 2024, or
  - o the children would be required to provide parental information on the FAFSA.
- **Other people** if they now live with your parent(s), your parent(s) provide more than half of their support, *and* your parent(s) will continue to provide more than half of their support through June 30, 2024.

List the names and information of all household members in the table below.
Attach a separate sheet if you need additional space.

Full Name	Age	Relationship to Student	Name of College in 2023-2024*
		Self	Lewis & Clark College

* Include name of school if a household member is, or will be, **enrolled at least half time** in a degree, diploma, or certificate program at an eligible postsecondary educational institution at any time between July 1, 2023 and June 30, 2024.

PARENT Income Information

1. Did the **PARENT(S)** file a 2021 Federal Tax Return?
   See instructions for tax-related documents on page 4.

   ☐ Yes. The parent(s) successfully imported 2021 federal tax information into the FAFSA using the IRS Data Retrieval Tool (DRT).

   ☐ Yes. The parent(s) will submit a **SIGNED** copy of their 2021 Federal Tax Return(s) *OR* a copy of their 2021 IRS Tax Return Transcript(s).

   ☐ No. The parent(s) was/were not employed AND had no income earned from work in 2021. The parent(s) will submit a copy of their 2021 IRS Verification of Non-Filing Letter(s).

   ☐ No. The parent(s) was/were employed, but did not file AND is/are not required to file a 2021 Federal Tax Return. The parent(s) will:
   - Submit a copy of their 2021 IRS Verification of Non-Filing Letter(s),
   - Submit copies of all their 2021 W-2 Form(s), and
   - List all employers and income in the following table.

Parent(s)' Employer/Source of Income	Amount Earned in 2021

STUDENT Income Information

2. Did the **STUDENT** file a 2021 Federal Tax Return?
   See instructions for tax-related documents on page 4.

   ☐ Yes. The student successfully imported 2021 federal tax information into the FAFSA using the IRS Data Retrieval Tool (DRT).

   ☐ Yes. The student will submit a **SIGNED** copy of their 2021 Federal Tax Return *OR* a copy of their 2021 IRS Tax Return Transcript.

   ☐ No. The student was not employed AND had no income earned from work in 2021.

   ☐ No. The student was employed, but did not file AND is not required to file a 2021 Federal Tax Return. The student will:
      - Submit copies of all their 2021 W-2 Form(s), and
      - List all employers and income in the following table.

Student's Employer/Source of Income	Amount Earned in 2021

NEXT STEP: PRINT, SIGN, and SUBMIT this form!
TYPED/DIGITAL SIGNATURES ARE NOT ACCEPTABLE

By signing this form, I certify that all the information reported is complete and correct. I understand that if I purposely give false or misleading information, I may be fined, sent to prison, or both.

_____   _____

Student Signature   **Date**

_____   _____

Parent Signature   **Date**

Upload this complete, signed form and any required tax-related documents to one of the following secured portals:
- **INCOMING Students – Pioneer Portal**
- **CONTINUING Students – Financial Aid Document Upload Portal**

Instructions for Tax-Related Documents

2021 Tax Filers

Using the IRS Data Retrieval Tool (DRT) — Recommended Method for Tax Filers
- Visit FAFSA.gov and log in to the student's 2023-2024 FAFSA.
- Select "Make FAFSA Corrections."
- Navigate to the "Financial Information" section of the FAFSA. Follow the instructions to determine if the student and/or parent(s) are eligible to use the IRS Data Retrieval Tool. Transfers of unaltered IRS data are acceptable for verification.
  - Most tax filers are eligible to use the DRT, but in some scenarios, the DRT will not be an option. If, for example, parents are married but filed separate tax returns, or marital status changed after the tax year in question ended, income information must be manually entered into the FAFSA and verified by a different method.

Options for obtaining an IRS Tax Return Transcript
Important Note – The instructions below apply to each tax filer. If parents who are married or living together filed separate tax returns for 2021, you will need to provide an IRS Tax Return Transcript for both of them.
- **Online Request:** Go to IRS.gov/transcript. Choose "Get Transcript Online" for instant delivery via PDF, or choose "Get Transcript by Mail" for postal delivery within 5-10 days. Make sure to request the 2021 IRS Tax Return Transcript and **NOT** the IRS Tax Account Transcript.
- **Paper Request:** Download IRS Form 4506T-EZ. Complete lines 1-4, enter "2021" on line 6, and sign. Submit to the IRS as instructed on page 2 of the form, being sure to use the correct address or fax number for your state of filing.
- **Telephone Request:** Call 1-800-908-9946. After following the prompts, select option 2 to request a Tax Return Transcript (NOT a Tax Account Transcript) and then enter "2021."

Parent Non-Tax Filers

Options for obtaining an IRS Verification of Non-Filing Letter (Parent Only)
All parents who are non-tax filers are required to provide an IRS Verification of Non-Filing Letter to confirm that a 2021 Federal Tax Return was not filed with the IRS.
- **Online Request:** Go to IRS.gov/transcript. Choose "Get Transcript Online" for instant delivery via PDF, or choose "Get Transcript by Mail" for postal delivery within 5-10 days. Request a 2021 Verification of Non-Filing Letter.
- **Paper Request:** Download IRS Form 4506-T. Complete lines 1-4, check the box on line 7, and enter "12/31/2021" on line 9. Check the attestation box, sign, date, and submit to the IRS as instructed on page 2 of the form. Mail or fax to Utah or Missouri depending on your state of residence.

After receiving the Tax Return Transcript or Verification of Non-Filing Letter from the IRS, add the student's L&C ID number to the top of each page and then submit to the Financial Aid Office via the Pioneer Portal (incoming students) or the Financial Aid Document Upload Portal (continuing students).