

2023-2024 Independent Verification Worksheet

Student Legal Name (First & Last)

Lewis & Clark ID

Student Email Address

Family Information

The following people should be counted in your household:

- **Yourself** (the student)
- **Your spouse** (if applicable)
- **Your children** (including biological, adoptive, stepchild(ren), and/or foster in some circumstances) if you will provide more than half of their support from July 1, 2023 – June 30, 2024,
- **Other people** if they now live with you, you provide more than half of their support, *and* you 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.

Student Income Information

1. Did the **STUDENT (and spouse, if married)** file a 2021 Federal Tax Return?
See instructions for tax-related documents on page 3.

- Yes. The student (and spouse, if married) successfully imported 2021 federal tax information into the FAFSA using the IRS Data Retrieval Tool (DRT).
- Yes. The student (and/or spouse, if married) 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 student (and spouse, if married) was/were not employed AND had no income earned from work in 2021. The student (and spouse, if married) will submit a copy of their 2021 IRS Verification of Non-Filing Letter(s).
- No. The student (and spouse, if married) was/were employed, but did not file AND is/are not required to file a 2021 Federal Tax Return. The student (and spouse, if married) 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.

Student's (and/or Spouse's, if Married) 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

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](https://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 is 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, student and spouse 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 student and spouse 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](https://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 2021 IRS Tax Account Transcript.
- **Paper Request:** Download [IRS Form 4506T-EZ](https://www.irs.gov/pub/irs-soi/20214506t-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."

Non-Tax Filers

Options for obtaining an IRS Verification of Non-Filing Letter

All 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](https://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](https://www.irs.gov/pub/irs-soi/20214506-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).