



# AGGREGATE VERIFICATION (V5) WORKSHEET

2023-2024

## Federal Student Aid Programs

Your Free Application for Federal Student Aid (FAFSA) was selected for verification which compares your FAFSA information to your financial documents. This is a federal requirement under 34CFR. If there are any differences, corrections will be made to the FAFSA and sent to the U.S. Department of Education for confirmation.

## What you MUST do:

- Collect your and your spouse's (if married) and parents(s) (for dependent students only) 2021 Tax Return Transcript, all W-2 and 1099 forms issued, and "Verification of Non-Filing Letter".
- Complete all sections of this form according to your dependency status in Blue or Black ink only. **Incomplete worksheets cause delays and will be returned for completion.**
- You and one parent must complete and sign this form (for dependent students only).
- Bring, fax, or mail your completed form to the LincolnU Student Financial Services Office.
- Do not make any additional income/ household size/ number in college corrections to the FAFSA once this form has been submitted.
- Contact the LincolnU Student Financial Services Office if you have questions completing this form.

The final deadline to complete the verification process is established by the Federal government and published in the Federal Register on an annual basis- [www.federalregister.gov](http://www.federalregister.gov).

## STUDENT INFORMATION

Student Name	LincolnU SID#
LincolnU Email	Phone Number (Include area code)
Permanent Address	
City/State/Zip	Birthdate

## HOUSEHOLD INFORMATION

### DEPENDENT STUDENT:

I am considered a dependent student, and must provide parental information on the FAFSA.

All household members include:

- Yourself
- Your parent(s) even if you don't live with your parent(s) (including a step-parent, biological parents who live together but are not married, same sex parents that are married, as recognized by state or foreign country).
- Your parent(s) other children if your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards,
- Other people only if they now live with your parent(s), and your parent(s) will provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

### INDEPENDENT STUDENT:

I am considered independent which does not require parental information on the FAFSA.

All household members include:

- Yourself
- Your spouse, if married. Must include same sex spouses as recognized by state or foreign country.
- Your children, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if they do not live with you.
- 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 through June 30, 2024.

- List the names and ages of **ALL** household member(s) as defined above, in the space(s) provided below, beginning with (You) the student. Also, write the name of the college for any household member who will attend college at least half-time between July 1, 2023 and June 30, 2024 and will enroll in a degree, diploma, or certificate program (please include your parent's in the section below, but **do not** include their college information in the box on the next page). **If more space is needed, attach a separate page.**

Student's Name	Age	Relationship	Attending College	College or University
		<b>SELF</b>	<b>Yes</b>	<b>Lincoln University</b>
Family Members	Age	Relationship to Student		College or University
		<b>Parent 1</b>	N/A	N/A
		<b>Parent 2</b>	N/A	N/A

## INCOME TAX FILING STATUS

- **FOR THOSE THAT FILED A 2021 TAX RETURN-** A faster, more effective way to verify income is by using the IRS Data Retrieval Tool that is a part of the FAFSA application. To access this option, log back into the 2023-2024 FAFSA at [www.FAFSA.gov](http://www.FAFSA.gov)
  - **If you are unsuccessful-** you **MUST** attach a copy of your 2021 Tax Return Transcript(s) to this form. To obtain an IRS Tax Return Transcript, go to [www.IRS.gov](http://www.IRS.gov) and under the Tools Heading SELECT "Get Transcript of Your Tax Records", then select "Get Transcript by mail", then request the "IRS Tax Return Transcript", **OR** call 1(800) 908-9946.
- **FOR THOSE THAT DID NOT FILE A 2021 TAX RETURN-** Please attach and submit copies of all 2021 IRS W2(s) AND a "Verification of Non-Filing Letter" if you answered that you worked but were not required to file a 2021 Tax Return **OR** if independent, you did not work and had no income earned from work in 2021. You can request copies of W2(s), 1099(s), and Verification of non-filing letter online at [www.IRS.gov](http://www.IRS.gov) **OR** by calling 1-800-829-1040 **OR** by completing the IRS form 4506-T, **OR** by visiting your local IRS office.

STUDENT	PARENT	Please READ and FOLLOW all given instructions provided below <i>Do Not leave this section blank.</i>
<input type="radio"/>	<input type="radio"/>	<ul style="list-style-type: none"> <li>• <b>Dependent students-</b> <i>must</i> have parent information; therefore, <b>TWO</b> "statements" must be selected in this section. <b>ONE</b> for the (Student) and <b>ONE</b> for the (Parent).</li> <li>• <b>Independent students-</b> <i>must</i> select <b>ONE</b> box (Student) in the chart below.</li> </ul>
<input type="radio"/>	<input type="radio"/>	<p>I was <b>NOT</b> employed, did <b>NOT</b> have earnings, and was <b>NOT</b> required to file an IRS Tax Return in 2021.</p> <ul style="list-style-type: none"> <li>• <b>Request a 2021 "Verification of Non-Filing Letter"</b> for you/ your spouse (if independent) or parent(s) (if dependent) from the IRS and attach it to this form. To order a free VNF Letter, please visit <a href="http://www.IRS.gov">www.IRS.gov</a> and complete form 4506-T, check Box 7.</li> </ul>
<input type="radio"/>	<input type="radio"/>	I used the IRS Data Retrieval Tool while completing the FAFSA and transferred my 2021 income tax information to the FAFSA and did not make any additional changes to the information.
<input type="radio"/>	<input type="radio"/>	<p>I was <b>UNABLE</b> to use the Data Retrieval Tool and will attach a copy of the 2021 IRS Tax Return Transcript to this form.</p> <ul style="list-style-type: none"> <li>• <b>Copies of an Account Transcript are not accepted.</b></li> <li>• <b>If you/ your spouse (if independent) or parents (if dependent) have filed separate returns, copies from each individual must be submitted for processing.</b></li> </ul>
<input type="radio"/>	<input type="radio"/>	<p>I filed a tax return and later amended my taxes.</p> <ul style="list-style-type: none"> <li>• <b>Copies of the original 2021 Tax Return Transcript AND a signed copy of the 1040X form are attached to this form.</b></li> </ul>
5c <input type="radio"/>	5c <input type="radio"/>	<p>I was employed and had income, but was not required to file a 2021 Tax Return.</p> <ul style="list-style-type: none"> <li>• <b>Complete the Chart below:</b> list all employer(s) and the amount that was earned in 2021.</li> <li>• <b>Attach copies of all 2021 W-2 and 1099 Forms.</b></li> <li>• <b>Request a 2021 "Verification of Non-Filing Letter"</b> for you/ your spouse (if independent) or parent(s) (if dependent) from the IRS and attach it to this form. To order a free VNF Letter, please visit <a href="http://www.IRS.gov">www.IRS.gov</a> and complete form 4506-T check Box 7.</li> </ul>
Non-Tax Filers with 2021 earnings are federally required to submit a copy of all W-2(s) and 1099 forms from each employer to LincolnU Student Financial Aid with the form.		
<b>COMPLETE CHART ONLY IF BOX 5C ABOVE IS CHECKED</b>	<b>Employer's Name</b>	<b>2021 Amount Earned</b>
		<b>IRS W-2 Attached?</b>

## HIGH SCHOOL COMPLETION

Provide ONE of the following documents that indicates your high school completion status when you begin college in 2021-2024.

**Check the box that applies:**

<input type="checkbox"/> High School diploma (with specific graduation date).	<input type="checkbox"/> If you completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar documents.
<input type="checkbox"/> A copy of your final official high school transcript that shows the date when the diploma was awarded.	<input type="checkbox"/> A state certificate or transcript received after you passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSet, TASC, or other State-authorized examination).
<input type="checkbox"/> An academic transcript that indicates you successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.	<input type="checkbox"/> If you were homeschooled in a state where the state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.



If you were homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a transcript, or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student completed secondary school education in a homeschool setting.

**BEFORE YOU/ YOUR PARENT (IF DEPENDENT) SIGNS BELOW....**

- \* Manually sign with a ballpoint pen.
- \* Forms with digital/electronic/typed signatures cannot be accepted and will be marked as incomplete.
- \* Make sure you have not left any section blank.
- \* Make sure all required documents are attached AND include the student ID on each additional page.

Each person signing certifies that all information reported is complete and correct. Each person also understands that if any section is left blank, any document(s) that are listed as "required" but not submitted is considered incomplete and aid will NOT be granted. I/We, understand that all formal communication is sent to the preferred email account established for electronic communication from the Office of Student Financial Aid at Lincoln University about required or follow-up document request, and that any "Received or Incomplete" requested information can also be accessed through the Blue Tiger Self-Service portal for Financial Aid. The student and at least one parent whose information was reported on the 2023-2024 FAFSA must sign and date this worksheet.

**Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student	Date	Parent	Date
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**STOP HERE- READ THE FOLLOWING INSTRUCTIONS CAREFULLY**



**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**

In order to complete the verification process, you, the student must appear **IN PERSON** at Lincoln University to verify his or her identity by presenting a valid government-issued photo identification (ID), such as, but not limited to, a state issued driver's license, other state-issued ID, or passport. Lincoln University will maintain a copy of the student's photo ID that is annotated with the date it was received and the name of the official at the institution authorized to collect the student's ID. **This section must be completed in the presence of a financial aid administrator. OR**

**If you are Unable to appear IN PERSON at Lincoln University** to verify your identity, you the student must provide to the institution: (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as but not limited to, a driver's license, other state-issued ID, or passport; and (b) the original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized. **This section must be completed in the presence of a Public Notary.**

**Statement of Educational Purpose (COMPLETE THIS SECTION IF YOU ARE IN PERSON)**

I certify that, I (*print student name*) \_\_\_\_\_, am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending the Lincoln University for 2023-2024.

Student Signature \_\_\_\_\_ Date \_\_\_\_\_

Student ID Number \_\_\_\_\_

Financial Aid Administrator Signature \_\_\_\_\_ Date \_\_\_\_\_

**Notary's Certificate of Knowledge (ONLY COMPLETE THIS SECTION IF YOU ARE UNABLE TO APPEAR IN PERSON)**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_ Date \_\_\_\_\_

Before me, \_\_\_\_\_ Notary's Name personally appeared, \_\_\_\_\_ Printed Name of Signer

And provided to me on basis of satisfactory evidence of identification \_\_\_\_\_ Type of Government-Issued Photo ID Provided

To be the above-name person who signed the foregoing instrument.

Witness my hand and official seal \_\_\_\_\_ Notary Signature

SEAL

\_\_\_\_\_ Date Commission Expires