

# 2019-2020 Institutional Verification Form for an Independent Student

Lock Haven University Financial Aid Office

223 Ulmer Hall, Lock Haven, PA 17745

PH: (570) 484-2424

FAS: (570) 484-2918

Your 2019–2020 Free Application for Federal Student Aid (FAFSA) was selected for a process called Verification.

- Verification is required by the US Department of Education to confirm that the information on your FAFSA was reported correctly.
- Return this form and any other requested items within **30 days**.
- No federal aid will process until this review is complete.
- **If you haven't already done so, use the IRS Data Retrieval Tool (DRT) on the FAFSA to directly link your 2017 IRS tax return information.**

Please Note: If you are unable to use the IRS Data Retrieval Tool, we are **NOW** able to accept a **signed** copy of your 1040 tax form:

- You may now provide a **signed** photocopy of your 2017 tax form (1040, 1040A, 1040EZ), or an IRS tax return transcript for 2017

## A. Student's Information

Name:			
Date of Birth:	Phone Number:	Email Address:	LHU ID #:
Address:			

## B. Student's Marital Status

Please check one:  Single  Married/Remarried (Date: \_\_\_\_\_)  Divorced/Separated/Widowed (Date: \_\_\_\_\_)

## C. Household Members

Please list the people in the **student's household** including:

- The **student**.
- The student's **spouse**, if married.
- The **student's children, only if the student will provide more than half their support** from July 1, 2019 through June 30, 2020.
- **Other people, if they now live with the student, and the student provides more than half their support**, and will continue to provide more than half their support through June 30, 2020.
- **For listed household member(s)**, indicate if the person will be enrolled at least half time in a degree, diploma or certificate program at an eligible postsecondary institution any time between July 1, 2019 and June 30, 2020.

Full Name	Age	Relationship <small>(spouse, child, stepchild)</small>	College Name <small>Write the full name of the college, if applicable</small>	Will be Enrolled at Least Half Time <small>(6 credits or more)</small>	
		<b>Student</b>	<b>Lock Haven University</b>	Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No

If more space is needed, provide a separate page with the student's name and LHU ID # at the top.

#### ***D. Student 2017 IRS Income Tax Return Information***

Please check **one** of the four options below:

- 2017 Tax Return Filed/ Used DRT:** The student filed a 2017 tax return, and transferred their 2017 IRS Income Tax Return information to the FAFSA using the [IRS Data Retrieval Tool](#).
- 2017 Tax Return Filed/ Tax Return:** The student filed a 2017 tax return, they were unable to use the IRS Data Retrieval Tool, and are including a **signed** copy of their [2017 tax return](#), or IRS Tax Return Transcript for 2017.
- No 2017 Tax Return Filed/ Student Employed:** The student was employed in 2017 but was not required to file a 2017 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS and copies of [all relevant 2017 w-2\(s\)](#).
- No 2017 Tax Return Filed/ Student Not Employed:** The student was not employed in 2017 and was not required to file a 2017 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS.

#### ***E. Spouse (if applicable) 2017 IRS Income Tax Return Information***

Please check **one** of the four options below for the spouse:

- 2017 Tax Return Filed/ Used DRT:** The spouse filed a 2017 tax return, and transferred their 2017 IRS Income Tax Return information to the FAFSA using the [IRS Data Retrieval Tool](#).
- 2017 Tax Return Filed/ Tax Return Transcript:** The spouse filed a 2017 tax return, they were unable to use the IRS Data Retrieval Tool, and are including a **signed** copy of their [2017 tax return](#), or IRS Tax Return Transcript for 2017.
- No 2017 Tax Return Filed/ Spouse Employed:** The spouse was employed in 2017 but was not required to file a 2017 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS and copies of [all relevant 2017 w-2\(s\)](#).
- No 2017 Tax Return Filed/ Spouse Not Employed:** The spouse was not employed in 2017 and was not required to file a 2017 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS.

**Important Note: Notify the financial aid office if you and your spouse filed separate IRS income tax returns for 2017, or had a change in marital status.**

#### **\*\*Verification of Non-Filing Letter:**

This is a document obtained from the IRS to verify that the student, and spouse (if applicable), did not file a tax return in 2017. This letter must be dated 10/01/18 or later.

- Go to [www.IRS.gov](http://www.IRS.gov) and click on "Get Your Tax Record", or call 1-800-908-9946. Upon receipt, forward document to LHU Financial Aid Office.

#### ***F. Certifications and Signatures***

Each person signing below certifies that all of the information reported is complete and correct. **Intentionally providing inaccurate information may be punishable by law.** The student and spouse (if applicable) must sign and date.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date