This form is listed as a requirement because you did not successfully use the IRS Data Retrieval Tool (DRT) on your 2018-2019 FAFSA. **If you are able to, please return to your saved FAFSA and use the Data Retrieval Tool. 2-3 business days after doing this please notify our office.** If you are not able to use the DRT or did not file a 2016 tax return then please complete this worksheet and attach the necessary documentation. You may mail, upload using self-service banner, or submit these documents in person. Please do not email or fax.

**Student Name:**

**LU Student ID:**

Please read all instructions carefully to help prevent processing delays for awarding!

Please make only one selection. Check which box below applies to you and review the instructions provided if necessary. You must submit the required documentation along with this form.

**The student filed a 2016 Tax Return**

**YOU MUST SUBMIT THE FOLLOWING DOCUMENTATION**

- 2016 IRS Tax Return Transcript (Please DO NOT submit your tax return)
- If an amended return was filed, please submit the signed 1040X and the 2016 IRS Tax Return Transcript (additional documents may be requested)

Please Note: A Tax Return Transcript is not the same as Tax Return Forms 1040, 1040A, or 1040EZ. Please review page 3 for more information and options on how to obtain a Tax Return Transcript.

**The student was NOT employed and had no income earned from work in 2016.**

I, ________________________________, solemnly affirm that I did NOT earn any income from work during the period of **January 1, 2016 – December 31, 2016**. I understand that willful falsification of information contained in this form can result in the referral of the matter for investigation as well as adjustments and/or cancellation of my financial aid award(s). I understand that I will be held personally responsible for all fines, fees, penalties and/or adjustments that may incur if I provide incorrect information.
2018-2019 Student Tax Information Verification Form Continued

Student Name:  
LU Student ID:  

☐ The student was employed in 2016 but did NOT and was NOT required to file a 2016 tax return.

I, ________________________________, solemnly affirm that I did NOT file a 2016 Tax Return.

(Print Student Name).

I understand that willful falsification of information contained in this form can result in referral of the matter for investigation as well as adjustments and/or cancellation of my financial aid award(s). I understand that I will be held personally responsible for all fines, fees, penalties and/or adjustments that may incur if I provide incorrect information.

YOU MUST SUBMIT THE FOLLOWING DOCUMENTATION & COMPLETE THE CHART BELOW

• Your 2016 W2 forms or the 2016 Wage and Income Transcript

LIST THE NAMES OF ALL EMPLOYERS AND YOUR 2016 EARNING (1/1/16-12/31/16)

<table>
<thead>
<tr>
<th>Employer’s Name</th>
<th>2016 Earnings</th>
<th>W-2 Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Ex.) ABCs Auto Body Shop</td>
<td>(Example) $7,000.00</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>$</td>
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<td>$</td>
<td></td>
</tr>
<tr>
<td>Total Income Earned in 2016</td>
<td>$</td>
<td></td>
</tr>
</tbody>
</table>

Additional documents may be requested at a later time to resolve any conflicting tax and income information.

Student Certification and Signature – PLEASE SIGN AND DATE BELOW

I certify that the information on this form is true and correct. Please sign only with your original signature in ink.

STUDENT’S SIGNATURE  DATE

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.
Obtain a Transcript or Verification of Non-Filing from the IRS

**Tax Return Transcript**

A **Tax Return Transcript** is not the same as your original tax return forms 1040, 1040A or 1040 EZ. It shows most line items including your **adjusted gross income (AGI)** from your original tax return as filed, along with any forms and schedules. It doesn't show changes made after you filed your original return. This transcript is only available for the current tax year and returns processed during the prior three years. A tax return transcript usually meets the needs of lending institutions offering mortgages and student loans. **Note:** the secondary spouse on a joint return must use Get Transcript Online or Form 4506-T to request this transcript type. When using Get Transcript by Mail or phone, the primary taxpayer on the return must make the request.

**How can I request Tax Return Transcript?**

1. Visit [www.IRS.gov](http://www.IRS.gov) and use the Get Transcript Online Tool (You will have to create an account if you do not already have one.
2. Visit [www.IRS.gov](http://www.IRS.gov) and select Get Transcript by Mail

**Wage and Income Transcript**

The **Wage and Income Transcript** shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5498, IRA Contribution Information. Current tax year information may not be complete until July. This transcript is available for up to 10 prior years.

**How can I request a Wage and Income Transcript?**

1. Visit [www.IRS.gov](http://www.IRS.gov) and use the Get Transcript Online Tool (You will have to create an account if you do not already have one.

**Verification of Non-filing Letter**

The **Verification of Non-filing Letter** provides proof that the IRS has no record of a filed Form 1040, 1040A or 1040EZ for the year you requested. It doesn’t indicate whether you were required to file a return for that year. This letter is available after June 15 for the current tax year or anytime for the prior three tax years using Get Transcript Online or Form 4506-T. You must use Form 4506-T if you need a letter for tax years older than the prior three years.

**How can I request a Verification of Non-filing Letter?**

1. Visit [www.IRS.gov](http://www.IRS.gov) and use the Get Transcript Online Tool (You will have to create an account if you do not already have one.

***Do NOT submit this page, for your information only***