JACKSON STATE UNIVERSITY

RETURN TO: FINANCIAL AID OFFICE
P. O. BOX 17065
1400 J. R. LYNCH STREET
JACKSON, MS 39217-0165
OFFICE: 601-979-2227 • FAX: 601-979-2237
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2016-2017 INDEPENDENT HOUSEHOLD RESOURCES GROUP (V6) INSTRUCTIONS

Instructions for Completing the Household Resources Group Form (V6)

A. Clearly Print and Complete All Information

We have received the student's 2016-2017 Free Application for Federal Student Aid (FAFSA). The student's FAFSA was selected for review in a process called Verification. As part of this process, Jackson State University is required by federal regulation to collect information to verify that the FAFSA information is accurate. If any differences are found, we will make corrections electronically on the student's behalf and the student will receive an updated Student Aid Report (SAR).

Indicate the student's Last Name, First Name and J-Number on each document submitted to the Financial Aid Office. Be sure to complete all items; do not leave any blank; enter "N/A" if not applicable. Provide information for student and spouse if the student is married. The student must complete and return this form to the Financial Aid Office as soon as possible. If more space is needed for any of the sections, provide a separate sheet that includes the requested information, and include the student's name and J-Number at the top of each sheet.

B. Student's Household and College Information

List the people in the student's household; include: (1) the student; (2) the student's spouse if the student is married; (3) the student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2016 through June 30, 2017, even if the children do not live with the student; and (4) other people if they now live with the student and the student or spouse provides more than half of the other people's support and will continue to provide more than half of their support through June 30, 2017.

Also, include information about any household member who is or will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2016 and June 30, 2017. Include the name of the college. The Financial Aid Office may require additional documentation if there is reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

C. Supplemental Nutrition Assistance Program (SNAP)

The student certifies that a member of the student's household received benefits from the Supplemental Nutrition Assistance Program (SNAP) sometime during 2014 or 2015. SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call 1-800-4FED-AID (1-800-433- 3243).

The student's household includes: (1) the student; (2) the student's spouse, if the student is married; (3) the student's or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2016 through June 30, 2017, even if the children do not live with the student; and (4) other people if they now live with the student and the student or spouse provides more than half of the other people's support and will continue to provide more than half of their support through June 30, 2017. If the Financial Aid Office has reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, documentation from the agency that issued the SNAP benefits in 2014 or 2015 may be required.

D. Child Support Paid

If student and/or spouse who is a member of the student's household paid child support in 2015, they must provide: (1) the names of the person who paid the child support, (2) the name of the person to whom the child support was paid, (3) the name and ages of the children for whom the child support was paid, and (4) the total annual amount of child support that was paid in 2015 for each child.

If the Financial Aid Office has reason to believe that the information regarding child support paid is inaccurate, additional documentation may be required; such as: (1) a signed statement from the individual receiving the child support certifying the amount of child support received; or (2) copies of the child support payment checks, money order receipts, or similar records of electronic payments having been made.

E. Verification of 2015 Income Information for Student Tax Filers

Notify the Financial Aid Office if the student and spouse, if married filed separate IRS federal income tax returns for 2015 or had a change in marital status after December 31, 2015.

A 2015 IRS Tax Return Transcript may be obtained through the:

- Online Request - Go to www.IRS.gov, under the Tools Heading on the IRS Homepage, click on "Get a Tax Transcript", click "Get a Tax Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."

- Telephone Request - 1-800-908-9946

- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

In most cases, for electronic tax return filers, 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2015 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2015 paper IRS income tax returns, the 2015 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 6-8 weeks after the 2015 paper IRS income tax return has been received by the IRS. Contact the Financial Aid Office if more information is needed about using the IRS DRT or obtaining an IRS Tax Return Transcript.

Verification of 2015 Income Information for Individuals with Unusual Circumstances

(1) Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2015 IRS income tax return and has been granted a filing extension by the IRS, provide the following documents:

- A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was filed with the IRS for tax year 2015;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2015; and
- A copy of IRS Form W–2 for each source of employment income received for tax year 2015 and, if self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2015.

(2) Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2015, provide both of the following:

- A 2015 IRS Tax Return Transcript (that will only include the information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A signed copy of the 2015 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

(3) Individuals Who Were Victims of Tax Identity Theft (See Pg.3)

A victim of Tax-identity theft must provide: (1) a Tax Return Data Base View (TRDBV) transcript(s) that includes all of the income and tax information required to be verified; and (2) a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

(4) Individuals Who Filed Non-IRS Income Tax Returns

An individual who filed or will file a 2015 income tax return with the relevant taxing authority of a U. S. territory, commonwealth, or with a foreign central government must provide: (1) a transcript that was obtained at no cost from the relevant taxing authority of a U.S. territory (Guam, American Samoa, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Marianas Islands), or a foreign central government, that includes all of the tax filer's income and tax information required to be verified for tax year 2015; or (2) a transcript obtained at no cost from the relevant taxing authority, a signed copy of the 2015 tax returns(s).

F. Verification of 2015 Income Information for Student Non-Tax Filers

Complete this section if the student and spouse, if married, will not file and are not required to file a 2015 income tax return with the IRS; and/or were not employed and had no income earned from work in 2015.

If employed in 2015: (1) the student and spouse, if married, must list the names of all employers, (2) the amount earned from each employer in 2015, and (3) indicate whether the IRS W-2 form(s) are attached. Note: Copies of all 2015 IRS W-2 forms issued to the student and spouse, if married, by their employers must be submitted. List every employer even if the employer did not issue an IRS W-2 form. The Financial Aid Office may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS for you and/or spouse.

G. Payments to Tax-Deferred Pension and Retirement Savings

Payments to tax-deferred pension and retirement savings List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S.

H. Child Support Received

List the actual amount of any child support received in 2015 for the children in the student's household. Do not include foster care payments, adoption payments, or any amount that was court ordered but not actually paid.

I. Housing, Food, Other Living Allowances Paid to Members of the Military, Clergy and Others

Include cash payments and/or the cash value of benefits received. Do not include the value of on-base military housing or the value of a basic military allowance for housing.

J. Veterans Non-Education Benefits

List the total amount of veterans non-education benefits received in 2015. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work Study allowances. Do not include federal Veterans Educational Benefits; such as: Post-9/11 GI Bill, Montgomery GI Bill, and Dependents Education Assistance Program VEAP Benefits.

K. Other Untaxed Income

List the amount of other untaxed income not reported nor listed elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc.

Do not include any items reported or excluded in A – D above. In addition, do not include extended foster care benefits, student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits,

Supplemental Security Income (SSI), Workforce Innovation and Opportunity Act (WIOA) educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.
Students must use their and their spouses', if married, 2015 Federal Tax Return to complete the items in chart number 2 (enter "0" if no funds received); and provide information about any other resources, benefits, and other assistance received by the student and any member of the student's household in number 3. This may include items that were not required to be reported on the FAFSA or other forms submitted to the Financial Aid Office.

L. Money Received or Paid on the Student's Behalf

List any money received or paid on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the student's 2015–2016 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions unless the person is the student's parent whose information is reported on the student's 2015–2016 FAFSA. Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

M. Certifications

Each person signing this worksheet certifies that all of the information reported on it is correct and complete.

WARNING: If an individual purposely give false or misleading information on this worksheet, he/she may be fined, be sentenced to jail, or both.