



## DEPENDENT AGGREGATE – 2013-14 VERIFICATION WORKSHEET (V5)

(HIGH SCHOOL COMPLETION STATUS, IDENTITY/STATEMENT OF EDUCATIONAL PURPOSE, CHILD SUPPORT PAID, SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP), TAX AND NON TAX FILERS)

### A. STUDENT'S INFORMATION (PLEASE PRINT)

<small>(STUDENT'S LAST NAME)</small>	<small>(STUDENT'S FIRST NAME)</small>	<small>(STUDENT'S J-NUMBER)</small>

STREET ADDRESS (INCLUDE APT. NO.)

(CITY) (STATE) (ZIP CODE)

CONTACT PHONE NUMBER (INCLUDE AREA CODE)

**NOTE:** Your FAFSA application has been selected by the Federal Student Aid processor for a review process called verification. In this process JSU will compare the data from your FAFSA to you and your spouse's 2012 federal tax forms sent to JSU through the IRS Data Retrieval process or from a tax return transcript from the IRS and other IRS documents. The law states that we have the right to request this information from you before awarding Federal Student Aid. If there are differences between your FAFSA data and your financial documents, JSU will send corrections electronically to the Federal Student Aid processor to have your information re-processed. Your Financial Aid award may be revised due to verification. To prevent your aid from being delayed, complete this form and submit it to the JSU Financial Aid Office as soon as possible. We must review the requested information, under the Financial Aid program rules (34 CFR, Part 668).

### B. STUDENT'S FAMILY INFORMATION

List below the people in your parent(s) household. You must include:

- Yourself.
- Your parent(s), including a stepparent(s) even if you don't live with your parent(s).
- Your parents' other children if your parent(s) will provide more than half of their support from July 1, 2013, through June 30, 2014, or if the other children would be required to provide parental information if they were completing a FAFSA for 2013-2014. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2014.
- Include the name of the college for any household member, **excluding your parent(s)**, who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2013 and June 30, 2014. **Attach separate sheet if needed; include your name and J-Number.**

Full Name	Age	Relationship to Student	College	Will Be Enrolled at Least Half Time Yes/No
		Self	Jackson State University	Yes

STUDENT'S NAME: \_\_\_\_\_

J-NUMBER: \_\_\_\_\_

**C. STUDENT'S INCOME INFORMATION TO BE VERIFIED**

- 1) TAX RETURN FILERS - Important Note:** If the student filed, or will file, an amended 2012 IRS tax return, the student must contact the financial aid administrator before completing this section.

**Instructions:** Complete this section if the student, filed or will file a 2012 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2012 IRS income tax information into the student's FAFSA. It takes up to three weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eleven weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.

**Check the box that applies:**

- ☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2012 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student's school will use the IRS information that was transferred in the verification process.
- ☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2012 IRS income information into the student's FAFSA once the student has filed a 2012 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.
- ☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will **submit to the school a 2012 IRS tax return transcript**—not a photocopy of the income tax return. To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2012 IRS tax return was filed). It takes up to three weeks for IRS income information to be available for electronic IRS tax return filers, and up to eleven weeks for paper IRS tax return filers. **Verification cannot be completed until the IRS tax transcript has been submitted to the student's school.**

☐ Check here if the student's IRS tax return transcript is attached to this worksheet.

☐ Check here if the student's IRS tax return transcript will be submitted to the student's school later.

- 2) TAX RETURN NONFILERS - Note:** Complete this section if the student will not file **AND** is not required to file a 2012 income tax return with the IRS. **Check the box that applies:**

- ☐ The student was not employed and had no income earned from work in 2012.
- ☐ The student was employed in 2012 and has listed below the names of all the student's employers, the amount earned from each employer in 2012, and whether an IRS W-2 form is attached. Attach copies of all 2012 IRS W-2 forms issued to the student by employers. List every employer even if they did not issue an IRS W-2 form. **If more space is needed, attach a separate sheet with the student's name and Social Security Number at the top of sheet.**

EMPLOYER'S NAME	2012 AMOUNT EARNED	ATTACH IRS W-2 FORM
JACKSON'S AUTO BODY SHOP (EXAMPLE)	\$2,000.00 (EXAMPLE)	YES (EXAMPLE)

STUDENT'S NAME: \_\_\_\_\_

J-NUMBER: \_\_\_\_\_

**D. PARENT'S INCOME INFORMATION TO BE VERIFIED**

**Note:** If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

- 1) TAX RETURN FILERS—Important Note:** If the student's parent(s), filed or will file, an amended 2012 IRS tax return the student's financial aid administrator must be contacted before completing this section.

**Instructions:** Complete this section if the student's parent(s) filed or will file a 2012 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent(s) and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2012 IRS income tax information into the student's FAFSA. It takes up to three weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eleven weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.

**Check the box that applies:**

- ☐ The student's parent(s) has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2012 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.
- ☐ The student's parent(s) has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2012 IRS income information into the student's FAFSA once the parent(s) IRS tax return has been filed. See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.
- ☐ Check here if an IRS tax return transcript(s) is attached to this worksheet.
- ☐ Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

- 2) TAX RETURN for NONFILERS—**Complete this section if the student's parent(s) will not file **and** is not required to file a 2012 income tax return with the IRS.

**Check the box that applies:**

- ☐ The parent(s) was not employed and had no income earned from work in 2012.
- ☐ The parent(s) was employed in 2012 and has listed below the names of all the parent(s) employers, the amount earned from each employer in 2012, and whether an IRS W-2 form is attached. Attach copies of all 2012 IRS W-2 forms issued to the parent(s) by employer(s). List every employer even if they did not issue an IRS W-2 form. **If more space is needed, attach a separate sheet with the student's name and J-Number at the top of sheet.**

EMPLOYER'S NAME	AMOUNT EARNED IN 2012	ATTACH IRS W-2 FORM
		Yes

STUDENT'S NAME: \_\_\_\_\_

J-NUMBER: \_\_\_\_\_

**E. UNTAXED AND OTHER SOURCES OF INCOME WORKSHEET - DO NOT LEAVE ANY ITEMS BLANK; ENTER "0" IF NOT APPLICABLE.**

Documentation of benefits, including denial or ineligibility for benefits, may be requested after review of the information you provide.

Student	Additional Income:	Parent
\$	Education credits ( Hope, Lifetime Learning, and American Opportunity tax credits) from the IRS Form 1040 (line 49) or 1040a (line 31). (2012 federal taxes).	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Student grant and scholarship aid reported to the IRS in your adjusted gross income. Include AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income.	\$
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.	= \$
Student	Untaxed Income:	Parent
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S. (2012 W2 forms).	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040, line 28 + line 32, or 1040A, line 17. (2012 federal taxes)	\$
\$	Child support received for all children. Don't include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040, line 8b or 1040A, line 8b. (2012 federal taxes)	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here. (2012 federal taxes).	\$
\$	Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here. (2012 federal taxes).	\$
\$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	\$
\$	Veteran's non education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Other untaxed income not reported in items 92a through 92h, such as workers' compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040 — line 67. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special funds.	\$
\$	Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.	\$
= \$	Total columns—answer must be provided (may not leave items blank) enter zero if item does not apply to you. Further documentation may be requested.	= \$
<b>WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, prosecuted for fraud, sentenced to jail, and/or face other charges, and will have to repay any financial aid funds you receive.</b>		

STUDENT'S NAME: \_\_\_\_\_ Student's Date of Birth: \_\_\_\_\_ Student's SSN: \_\_\_\_\_

## F. SNAP

- 1) Did you, your parent(s) or a member of your parent(s) household (listed in Section B) receive benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2011 or 2012?   YES     NO

If the Financial Aid Office believes that the information regarding the receipt of SNAP Benefits is inaccurate, we may require documentation from the agency that issued the SNAP Benefits in 2011 or 2012. Include your name and JSU ID on all documents submitted.

## G. CHILD SUPPORT PAID

Did your parent(s) pay child support for children outside of your household in 2012? ☐ Yes ☐ No

- 1) Do not answer "Yes" if child support was paid for children in your parent's household.
- 2) If **"Yes"**, complete the section below if your parent(s) paid child support in 2012. Attach a separate sheet if needed.

NAME OF PERSON WHO PAID CHILD SUPPORT	NAME OF PERSON TO WHOM CHILD SUPPORT WAS PAID	NAME OF CHILD FOR WHOM CHILD SUPPORT WAS PAID	AMOUNT OF CHILD SUPPORT PAID IN 2012
SPRING JACKSON (EXAMPLE)	VERDI LYNCH (EXAMPLE)	SUMMER JACKSON (EXAMPLE)	\$6,000.00

## H. HIGH SCHOOL COMPLETION VERIFICATION

You must provide a copy of one of the following documents to indicate your high school completion status to begin college in 2013-2014:

- High school diploma.
- Final official high school transcript that shows the date when the diploma was awarded.
- A copy of your General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates that you successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If State law requires a home schooled student to obtain a secondary school completion credential for home-school (other than a high school diploma or its recognized equivalent), a copy of that credential.
- A transcript or the equivalent, signed by the student's parent or guardian that lists the secondary school courses the student completed and documents the successful completion of a secondary school education in a home-school setting as State law requires.

STUDENT'S NAME: \_\_\_\_\_

J-NUMBER: \_\_\_\_\_

**I. INSTRUCTIONS: ALL STUDENTS MUST COMPLETE THE IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE:**

- (1) **TO COMPLETE IN PERSON:** Bring the Identity and Statement of Educational Purpose below to Jackson State University's Financial Aid Office along with your valid government-issued photo identification, such as but not limited to a driver's license, other state-issued ID or passport.

**OR**

- (2) **UNABLE TO COMPLETE IN PERSON:** The Identity and Statement of Educational Purpose (Section L) must be completed in the presence of a Notary Public. You must submit the **ORIGINAL** Identity and Statement of Educational Purpose **and** a copy of your valid government identification to the Financial Aid Office at Jackson State University.

**J.**

**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**

**2013-14**

**(To Be Signed at Jackson State University)**

The student must appear in person at **JACKSON STATE UNIVERSITY** to verify his or her identity by presenting a valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. Jackson State 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.

In addition, the student must sign, in the presence of the institutional official, the following:

**STATEMENT OF EDUCATIONAL PURPOSE**

I certify that I \_\_\_\_\_ am the individual signing this  
(PRINT STUDENT'S NAME)

Statement of Educational Purpose and that the federal student financial assistance I may receive only will be used for educational purposes and to pay the cost of attending **JACKSON STATE UNIVERSITY** for 2013-2014.

\_\_\_\_\_  
(STUDENT'S SIGNATURE)

\_\_\_\_\_  
(DATE)

\_\_\_\_\_  
(STUDENT'S ID NUMBER)

STUDENT'S NAME: \_\_\_\_\_

J-NUMBER: \_\_\_\_\_

**K.**

**IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE**

**2013-2014**

**(To Be Signed With Notary)**

If the student is unable to appear in person at **JACKSON STATE UNIVERSITY** to verify his or her identity, the student must provide:

(a) A copy of the valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a driver's license, other state-issued ID, or passport; and

(b) The original notarized Statement of Educational Purpose provided below.

**STATEMENT OF EDUCATIONAL PURPOSE**

I certify that I, \_\_\_\_\_, am the individual signing this Statement of Educational Purpose  
(PRINT STUDENT'S NAME)

and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending **JACKSON STATE UNIVERSITY** 2013-2014.

\_\_\_\_\_  
(STUDENT'S SIGNATURE)

\_\_\_\_\_  
(DATE)

\_\_\_\_\_  
(STUDENT'S ID NUMBER)

**NOTARY'S CERTIFICATE OF ACKNOWLEDGEMENT**

State of \_\_\_\_\_ City/County of \_\_\_\_\_ on \_\_\_\_\_,  
(DATE)

before me, \_\_\_\_\_ personally appeared \_\_\_\_\_ and  
(PRINT NOTARY'S NAME) (PRINT NAME OF SIGNER)

provided to me on the basis of satisfactory evidence of identification, \_\_\_\_\_,  
(TYPE OF GOVERNMENT-ISSUED PHOTO ID PROVIDED)

to be the above-named person who signed the foregoing instrument.

**WITNESS my hand and official seal**

Notary Signature \_\_\_\_\_  
(NOTARY SIGNATURE)

(SEAL)

My commission expires on \_\_\_\_\_  
(DATE)

**Return To:**

FINANCIAL AID OFFICE • P. O. BOX 17065 • 1400 J. R. LYNCH STREET • JACKSON, MS 39217-0165

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