



## INDEPENDENT AGGREGATE VERIFICATION GROUP (V5) 2015-2016

### Instructions for Completing the Independent Aggregate Verification Group Form (V5)

#### **A. Clearly Print and Complete All Information**

We have received the student's 2015-2016 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's 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 items blank; enter "N/A" if not applicable. Provide information for student and spouse if the student is married. 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. The student must complete and return this form to the Financial Aid Office as soon as possible.

#### **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, 2015, through June 30, 2016, 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, 2016.

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, 2015, and June 30, 2016, 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 2013 or 2014. 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, 2015 through June 30, 2016, 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, 2016. 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 2013 or 2014 may be required.

#### **D. Child Support Paid**

If the student and/or spouse, who is a member of the student's household, paid child support in 2014, they must provide: (1) the names of the persons who paid the child support, (2) the names of the persons to whom the child support was paid, (3) the names 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 2014 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 2014 Income Information for Student Tax Filers**

The student must notify the Financial Aid Office if the student or spouse filed separate IRS income tax returns for 2014 or had a change in marital status after December 31, 2014.

If the student's record is selected in the Process of Verification, the best way for them to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at FAFSA.gov. In most cases, no further documentation is needed to verify 2014 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

A 2014 IRS Tax Return Transcript may be obtained through the:

- Online Request - Go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage, click "Get Transcript of Your Tax Records." Click "Get Transcript ONLINE" or "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
- IRS2Go App – Apple Online Store at <https://itunes.apple.com/us/app/irs2go/id414113282?mt=8> Google Play at <https://play.google.com/store/apps/details?id=gov.irs>
- 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, 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2014 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2014

paper IRS income tax returns, the 2014 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 8–11 weeks after the 2014 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 2014 Income Information for Individuals with Unusual Circumstances**

##### **(1) Individuals Granted a Filing Extension by the IRS**

If an individual is required to file a 2014 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 2014;
- 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 2014; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2014 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 2014.

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

If an individual filed an amended IRS income tax return for tax year 2014, provide both of the following:

- A signed copy of the original 2014 IRS income tax return that was filed with the IRS or a 2014 IRS Tax Return Transcript; and
- A signed copy of the 2014 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

##### **(3) Individuals Who Were Victims of Tax Administration Identity Theft**

- A victim of tax administration identity theft who is not able to obtain a 2014 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490. Upon authentication of the tax filer's identity, the IRS will provide, by U.S. Postal Service, a printout of the tax filer's 2014 IRS income tax return information.

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

- An individual filed or will file a 2014 income tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, the Northern Marianas Islands), or with a foreign country, must provide:
- A signed copy of that 2014 income tax return(s); or
- A transcript obtained from a government of a U.S. territory or commonwealth, or a foreign central government that includes all of the tax filer's income and tax information required to be verified for tax year 2014.

#### **F. Verification of 2014 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 2014 income tax return with the IRS; and/or were not employed and had no income earned from work in 2014.

If employed in 2014: (1) the student and/or spouse must list the names of all employers, (2) the amount earned from each employer in 2014, and (3) whether an IRS W-2 form is provided. [Provide copies of all 2014 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form. Note: The Financial Aid Office may require you to provide documentation from the IRS that indicates a 2014 IRS income tax return was not filed with the IRS for you and/or spouse.

### **G. High School Completion Status**

Students must provide one of the following documents that will indicate the student's high school completion status when the student begins college in 2015–2016:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by a student after the student passed a State authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- For a homeschooled student in a state where state law requires the student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a homeschooled student in a state where state law does not require the student to obtain a secondary school completion credential for homeschool (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 successfully completed a secondary school education in a homeschool setting.

Note: A student who is unable to obtain the documentation listed above must contact the JSU Financial Aid Office at 601-979-2227 or email, [finaid@jsums.edu](mailto:finaid@jsums.edu).

### **H. 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.

### **I. Identity and Statement of Educational Purpose**

The student must appear in person at Jackson State University and complete the Identity and Statement of Educational Purpose 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. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed and the name of the official at the institution authorized to collect the student's ID.

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 provided 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 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.

#### **J. Identity and Statement of Educational Purpose**

The student must appear in person at Jackson State University and complete the Identity and Statement of Educational Purpose 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. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed and the name of the official at the institution authorized to collect the student's ID.

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 provided 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 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.