JACKSON STATE UNIVERSITY® 1877

RETURN TO: FINANCIAL AID OFFICE
P. O. BOX 17065
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JACKSON, MS 39217-0165
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2017-2018 INDEPENDENT STANDARD VERIFICATION GROUP (V1) INSTRUCTIONS

Instructions for Completing the Independent Standard Verification Group (V1) Form

A. Clearly Print and Complete All Information

We have received the student's 2017-2018 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 below the people in the student's household; include: (1) the student; (2) the student's spouse *if married*; (3) the student's or spouse's children if the student or spouse provides more than half of the children's from July, 1, 2017 through June 30, 2018 even if the child does not live with the student and (4) other people if they now live with the student provides more than half their support through June 30, 2018; and (5) include 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, 2017, and June 30, 2018. Attach a separate sheet and include the information below if needed:

C. Verification of 2015 Income Information for Student Tax Filer

This section applies to the student and spouse, *if the student is married*. The student must notify the Financial Aid Office if the student or spouse filed separate IRS income tax returns for 2015 or had a change in marital status after December 31, 2015.

Complete this section if the student and spouse *filed or will file* a 2015 IRS income tax return(s). *The best way 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 2015 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer. A **2015 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by MAIL – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript."
- Get Transcript ONLINE – Go to www.irs.gov, under the Tools heading, click "Get a tax transcript." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and ***NOT*** the "IRS Tax Account Transcript."
- Automated Telephone Request – 1-800-908-9946
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T

Note: Indicate whether you and your spouse, *if married* submitted a 2015 IRS Tax Transcript to the Jackson State University's Financial Aid Office for the 2015-16 year.

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. If the student and spouse filed separate 2015 IRS income tax returns, the IRS DRT cannot be used and the **2015 IRS Tax Return Transcript(s)** must be provided for each.

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;
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2016;
- 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) An individual Who Filed an Amended IRS Income Tax Return for Tax Year 2015

Individuals Who Filed an Amended IRS Income Tax Return must provide BOTH of the following:

- A **2015 IRS Tax Return Transcript** (that will only include 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-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; ***and***
- 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) Individual Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.

- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

D. Untaxed Income

You and your spouse's, *if married* must use your 2015 federal tax return (1040 or 1040a) to complete this section; enter "0" if no funds received. Indicate untaxed portions of IRA distributions, pensions, deductions and payments to qualified plans, tax exempt interest income and education credits.

E. 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 the student and/or spouse, *if married*, must list the names of all employers, (2) the amount earned from each employer in 2015, and (3) whether an IRS W-2 form(s) are attached **AND** (4) must submit documentation (Verification of Non-filing Letter) form 4506-T must be provided for the student and spouse from the IRS dated on or after October 1, 2016 that indicates a 2015 IRS Income Tax Return was not filed. Students may go to www.irs.gov for instructions on how to obtain the 4506-T form.

The student must list every employer even if the employer did not issue a W-2 form. Copies of all 2015 IRS W-2 forms issued to the student and spouse must be submitted to the Jackson State University's Financial Aid Office.

F. 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 prison, or both.