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
EMAIL: finaid@jsums.edu

INDEPENDENT HOUSEHOLD RESOURCES GROUP (V6) 2015-2016

Instructions for Completing the Household Resources Group Form (V6)

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 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, 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

Notify the Financial Aid Office if the student and 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 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, 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.

Verification of Other Untaxed Income for 2014

If any item does not apply, enter "N/A" for Not Applicable where a response is requested. Answer each question as it applies to the student and the student's spouse, if married whose information is on the FAFSA.

2014 IRS W-2 forms: Provide copies of all 2014 IRS W-2 forms issued by the employers to the independent student and spouse, if the student is married.

To determine the correct annual amount for each item: If you paid or received the same dollar amount every month in 2014, multiply that amount by the number of months in 2014 you paid or received it. If you did not pay or receive the same amount each month in 2014, add together the amounts you paid or received each month.

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 2014 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 2014. 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, Dependents Education Assistance Program, VEAP Benefits.

K. Other Untaxed Income

List the amount of other untaxed income not reported and not excluded 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 student aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

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 2014. Include support from a parent whose information was not reported on the student's 2014–2015 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 2014–2015 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. Verification of Other Untaxed Income For 2014

Additional Information: Provide information about any other resources, benefits, and other amounts received by the student and any members of the student's household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the Financial Aid Office, and include such things as federal veterans' education benefits, military housing, SNAP, TANF, etc.

N. 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.