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

2019-2020 INDEPENDENT AGGREGATE VERIFICATION GROUP (V5) INSTRUCTIONS

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

A. Clearly Print and Complete All Information

We have received the student's 2019-2020 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, 2019 through June 30, 2020, 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, 2020.

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, 2019 and June 30, 2020. 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. Verification of 2017 Income Information for Student Tax Filers

Complete this section if the student and spouse, if married, filed or will file a 2017 IRS income tax return. Check the box that applies. The student and spouse, if married, must use the 2017 Federal Tax Return to complete chart for "Untaxed Assistance Received".

The student must notify the Financial Aid Office if the student or spouse, if married, filed separate IRS income tax returns for 2017 or had a change in marital status after December 31, 2017. If the student's record is selected in the Process of Verification; the student and spouse, if married, may be required to submit a 2017 IRS Tax Transcript.

The student and spouse, if the student is married, must check the box that applies to indicate whether or not the IRS DRT tool was used.

A 2017 IRS Tax Return Transcript may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

NOTE: If the student and spouse filed separate 2017 IRS income tax returns, the IRS DRT cannot be used and the **2017 IRS Tax Return Transcript(s)** must be provided for each, and check one of the following:

____ Check here if a **2017 IRS Tax Return Transcript(s)** is provided.
____ Check here if a **2017 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2017 Income Information for Individuals with Unusual Circumstances

(1) Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2017 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2017, must provide:

- 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 2017;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2017;
- 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, 2018;
- A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2017 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 2017.

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

An individual who filed an amended IRS income tax return for tax year 2017 must provide a signed copy of the 2017 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- IRS DRT information on an ISIR record with all tax information from the original tax return; or
- A **2017 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.

(3) Individuals Who Were Victims of Tax-Related Identity Theft

- A victim of Tax-related identity theft must provide: (1) A Tax Return Database 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, (****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

- 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 Assistance Received

Complete chart using the student and spouse if the student is married federal IRS tax return 1040 or 1040A for the 2017 year. Do not leave any items blank. Enter ZERO "0" if item(s) do not apply.

E. Verification of 2017 Income Information for Student Non-Tax Filers

Complete this section if the student and spouse if the student is married; will not file and are not required to file a 2017 income tax return with the IRS; and/or were not employed and had no income earned from work in 2017.

If employed in 2017 the student and/or spouse, if married, must list the names of all employers, (2) the amount earned from each employer in 2017, and (3) whether an IRS W-2 form(s) were attached. The student must list every employer even if the employer did not issue a W-2 form. Copies of all 2017 IRS W-2 forms issued to the student and spouse, if married, must be submitted to the Financial Aid Office, ***or*** (4) provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2018 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority.

____ Check here if confirmation of nonfiling is provided.
____ Check here if confirmation of nonfiling will be provided later.

F. High School Completion Status

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2019-2020:

- A copy of the student's high school diploma **or** a copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- 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.
- 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 student who was homeschooled in a State where State law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a student who was homeschooled in a State where State law does not require the student to obtain a secondary school completion credential for homeschooling (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

G. Certification

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 sent to jail, or both.

H. 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 an unexpired 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.

I. Identity and Statement of Educational Purpose (Spanish)

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 an unexpired 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.