



2021-2022 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 2021-2022 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, 2021 through June 30, 2022, 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, 2022.

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, 2021 and June 30, 2022. 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 2019 Income Information for Student Tax Filers

Complete this section if the student and spouse, if married, filed or will file a 2019 IRS income tax return. Check the box that applies. The student and spouse, if married, must use the 2019 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 2019 or had a change in marital status after December 31,

2021-2022 Instructions for Completing the Independent Standard Verification Group (V1)

2019. If the student's record is selected in the Process of Verification; the student and spouse, if married, may be required to submit a 2019 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 2019 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." 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, 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." 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 2019 IRS income tax returns, the IRS DRT cannot be used and the **2019 IRS Tax Return Transcript(s)** must be provided for each, and check one of the following:

- Check here if a **2019 IRS Tax Return Transcript(s)** is provided.
- Check here if a **2019 IRS Tax Return Transcript(s)** will be provided later.

Verification of 2019 Income Information for Individuals with Unusual Circumstances

(1) Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2019 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2019, must 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 2019;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2019; and
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2019 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 2019.

2021-2022 Instructions for Completing the Independent Standard Verification Group (V1)

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

If an individual filed an amended IRS income tax return for tax year 2019, provide both of the following:

- A **2019 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 2019 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

- 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 2019 year. Do not leave any items blank. Enter ZERO “0” if item(s) do not apply.

E. Verification of 2019 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 2019 income tax return with the IRS; and/or were not employed and had no income earned from work in 2019.

2021-2022 Instructions for Completing the Independent Standard Verification Group (V1)

If employed in 2019 the student and/or spouse, if married, must list the names of all employers, (2) the amount earned from each employer in 2019, 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 2019 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, 2017 that indicates a 2019 IRS income tax return was not filed with the IRS or other relevant tax authority. Also, the student must check to confirm whether the non-filing document from IRS is provided or will be provided later.

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 jail, or both.