



2021-2022 DEPENDENT AGGREGATE VERIFICATION GROUP (V5)

Instructions for Completing Dependent Aggregate Verification Group (V5) Form

A. Clearly Print 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 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 the student and parent(s). 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 Family Household and College Information

List the people in the student's family household. Include: (1) yourself; (2) your parent(s), including a stepparent, even if the student doesn't live with the parent(s); (3) your parent's other children if your parent(s) will provide more than half of their support from July 1, 2021 through June 30, 2022, or if the other children would be required to provide parental information if they were completing a FAFSA for 2021-2022; include children who meet either of these standards even if the children do not live with the parent(s); and (4) other people, if they now live with your parent(s) and your parent(s) provide more than half of their 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 from July 1, 2021 through June 30, 2022, and include the name of the college. The Financial Aid Office may require additional documentation if we have 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

TAX FILERS: Complete this section if the student filed or will file a 2019 IRS income tax return. *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 2019 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

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A 2019 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."
- 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.

If the parents 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.

- D. Check the box that applies. The student must use the 2019 Federal Tax Return to complete chart for "**Untaxed Assistance Received**".

E. Verification of 2019 Income Information for Student Non-Tax Filers

NON-TAX FILERS: This certification section applies to the student. Complete this section if the student will not file and is not required to file a 2019 Income Tax Return with the IRS; and/or was not employed and had no income earned from work in 2019.

If employed in 2019, the student must: (1) list the names of all employers, (2) list the amount earned from each employer in 2019, and (3) indicate whether the IRS W-2 form(s) are attached.

NOTE: Copies of all 2019 IRS W-2 forms issued to the student by their employers must be submitted. 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 2019 IRS income tax return was not filed with the IRS for you.

F. Verification of 2019 Income Information for Parent Tax Filers

TAX FILERS: The instructions below apply to each parent included in the household. Notify the Financial Aid Office if the student's parent(s) filed separate IRS income tax returns for 2019 or had a change in marital status after December 31, 2019.

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Complete this section if the student's parent(s) filed or will file a 2019 IRS income tax return. *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 2019 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 2019 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.

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's parent(s) 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. Indicate whether the student's parent(s)' **2019 IRS Tax Return Transcript(s)** is provided **OR** if the parent(s)' **2019 IRS Tax Return Transcript(s)** will be provided later.

- G.** Check the box that applies. The student must use the 2019 Federal Tax Return to complete chart for **"Untaxed Assistance Received"**.

H. Verification of 2019 Income Information for Parent Non-tax Filers

NON-TAX FILERS: The instructions and certifications apply to each parent included in the household. Complete this section if the student's parent(s) will not file and are not required to file a 2019 an IRS income tax return with the IRS; and/or were not employed and had no income earned from work in 2019.

If employed in 2019, the student's parent(s) must: (1) list the names of all employers, (2) list the amount earned from each employer in 2019, and (3) indicate whether the IRS W-2 form(s) are attached.

NOTE: Copies of all 2019 IRS W-2 forms issued to the student's parent(s) by their employers must be submitted. 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 2019 IRS income tax return was not filed with the IRS for you.

I. 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 2021–2021:

- 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.

J. Certification

Each person signing this worksheet certifies that all of the information reported on it is correct and complete. The student and one parent whose information was reported on the FAFSA must sign and date this page. **WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, be sent to jail, or both.

K. 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.

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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 unexpired 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.

L. Identity And Statement Of Educational Purpose (For Spanish Students)

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.