

2022-2023 Independent Aggregate Verification Group (V5) Form

RETURN TO: FINANCIAL AID OFFICE
 P. O. BOX 17065
 1400 J. R. LYNCH STREET
 JACKSON, MS 39217-0165
 OFFICE: (866) THEEJSU/ (866-84-3578) FAX: 601-979-2237
 EMAIL: finaid@jsums.edu

A. Student's Information

Last Name	First Name	M.I.	JNumber
Address		City	State Zip Code
Email Address		Home or Cell Number	

B. STUDENT'S HOUSEHOLD AND COLLEGE INFORMATION

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- You and your spouse children if the student or spouse will provide more than half of the children's support from July 1, 2022 through June 30, 2023, even if a child does not live with you and your spouse.
- Other people if they live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2023.

Include the name of the college for any household member who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2022, and June 30, 2023. If more space is needed, attach a separate page with your name and J-Number at the top.

Full Name	Age	Relationship To Student	College	Will Be Enrolled at Least Half-Time (Yes Or No)
		SELF	Jackson State University	YES

C. VERIFICATION OF 2020 INCOME INFORMATION FOR STUDENT TAX FILER

Important Note: The instructions below apply to the student and spouse, if the student is married. Notify the financial aid office if the student or spouse filed separate IRS income tax returns for 2020 or had a change in marital status after December 31, 2020.

Instructions: Complete this section if the student and spouse filed or will file a 2020 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 studentaid.gov. In most cases, no further documentation is needed to verify 2020 income information that was transferred into the student's FAFSA using the IRS DRT if that information was not changed.

Check the box that applies:

- The student has used the IRS DRT in FAFSA on the Web to transfer 2020 IRS income tax return information into the student's FAFSA.
- The student has not yet used the IRS DRT in FAFSA on the Web, but will use the tool to transfer 2020 IRS income tax return information into the student's FAFSA once the 2020 IRS income tax return has been filed.

The student is unable or chooses not to use the IRS DRT in FAFSA on the Web, and instead will provide the school a **2020 IRS Tax Return Transcript(s)**. If the student and spouse filed separate 2020 IRS income tax returns, **2020 IRS Tax Return Transcripts** must be provided for each.

- Check here if a 2020 IRS Tax Return Transcript(s) is provided.
- Check here if a 2020 IRS Tax Return Transcript(s) will be provided later.

A **2020 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."
- Telephone Request - 1-800-908-9946
- Paper Request Form - IRS Form 4506T-EZ or IRS Form 4506-T

D. VERIFICATION OF 2020 INCOME INFORMATION FOR STUDENT NON-TAX FILER

The instructions and certifications below apply to the student and spouse, if the student is married. Complete this section if the student and spouse will not file and are not required to file a 2020 income tax return with the IRS.

Check the box that applies:

- The student and spouse were not employed and had no income earned from work in 2020.
- The student and/or spouse were employed in 2020 and have listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is provided. [Provide copies of all 2020 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.

If more space is needed, provide a separate page with the student's name and ID number at the top. **Note: We may require you to provide documentation from the IRS that indicates a 2020 IRS income tax return was not filed with the IRS.**

Employer's Name	Annual Amount Earned in 2020	IRS W-2 Form Attached? (Yes or No)
JSU Financial Aid Office (example)	\$ 4,500.00	Yes
Total Amount of Income Earned From Work	\$	

E. Verification of 2020 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2020 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 2020;
- 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 2020; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2020 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 2020.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2020, provide both of the following:

- A signed copy of the original 2020 IRS income tax return that was filed with the IRS or a 2020 IRS Tax Return Transcript; **and**
- A signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of Tax Administration Identity Theft

- A victim of tax administration identity theft who is not able to obtain a 2020 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 2020 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2020 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 2020 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 2020.

F. HIGH SCHOOL COMPLETION STATUS

Instructions: Provide ONE of the following documents to indicate the student's high school completion status when the student will begin college in 2022–2023:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate, an official GED transcript that indicates that the student passed the exam, or a state-authorized high school equivalent certificate.
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- 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 homeschooled student from a state where state law requires the student to obtain a secondary school completion credential for home school (other than a high school diploma or its recognized equivalent), a copy of that credential.
- For a homeschooled student from a state where state law does not require the student to obtain a secondary school completion credential for home school (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 home school setting.

NOTE: A student who is unable to obtain the documentation listed above must contact the JSU Financial Aid Office at (866)THEEJSU/ (866-843-3578) or email at finaid@jsums.edu.

G. IDENTITY AND STATEMENT OF EDUCATIONAL PURPOSE (TO BE SIGNED IN THE PRESENCE OF A NOTARY)

If you are able to appear in person at Jackson State University to verify your identity, you must provide:

- (a) **A copy of the unexpired-valid government-issued photo identification (ID) that is acknowledged in the notary statement below or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport. Jackson State University 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 receive and review the student's ID.**

If you are unable to appear in person at Jackson State University to verify your identity, you must provide:

- (b) **A copy of the unexpired-valid government-issued photo identification (ID) that is acknowledged in the notary statement below or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and**
- (c) **The original Statement of Educational Purpose, which is provided below, must be notarized.**

Student's Name _____

JNumber _____

Statement of Educational Purpose

I certify that I, _____ (Print Student's Name) am the individual signing this statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Jackson State University (Name of Postsecondary Educational Institution) for 2022–2023.

Student's Signature

Date

J_____
J Number

Number Notary's Certificate of Acknowledgement

State of _____ City/County of _____

On _____ (Date), before me, _____, (Notary's name) personally appeared _____ (Printed name of signer) and proved to me on basis of satisfactory evidence of **Student's** identification _____ (Type of government-issued photo ID provided) to be the above-named person who signed the foregoing instrument.

WITNESS my hand and official seal

(seal)

(Notary signature)

My commission expires on _____ (Date)

H. Verification of 2020 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

If an individual is required to file a 2020 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 2020;
- 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 2020; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2020 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 2020.

Individuals Who Filed an Amended IRS Income Tax Return

If an individual filed an amended IRS income tax return for tax year 2020 provide both of the following:

Student's Name _____

JNumber _____

- A signed copy of the original 2020 IRS income tax return that was filed with the IRS or a 2020 IRS Tax Return Transcript; and
- A signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

Individuals Who Were Victims of Tax Administration Identity Theft

- A victim of tax administration identity theft who is not able to obtain a 2020 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 2020 IRS income tax return information.

Individuals Who Filed Non-IRS Income Tax Returns

- An individual filed or will file a 2020 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 2020 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 2020.

I. CERTIFICATION AND SIGNATURE

Student's Signature	Date
---------------------	------

Spouse's Signature	Date
--------------------	------

JSU Financial Aid Staff Member's Signature (ONLY IF WITNESSING IN-PERSON SIGNATURES OF STUDENT AND PARENT)	Date
---	------

JSU Financial Aid Staff Member's Name & Title (IF SIGNED ABOVE, MUST ALSO COPY ORIGINAL ID'S)
--