

2022-2023 V5 Aggregate Verification Worksheet - Independent

 Student's Last Name First Name M.I. Student's Identification (ID) Number

 Student's Street Address (include apt. no.) Student's Date of Birth

 City State Zip Code Student's Email Address

 Student's Home Phone Number (include area code) Student's Alternate or Cell Number

Number of Household Members and Number in College

List below the people in the student's household. Include:

- The student.
- The student's spouse, if the student is married.
- The student's or spouse's children if the student or spouse will provide more than half of their support from July 1, 2022, through June 30, 2023, even if the children do not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of their support and will continue to provide more than half of their support through June 30, 2023.

For any household member who 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, 2022, and June 30, 2023, include the name of the college.

If more space is needed, provide a separate page with the student's name and ID number at the top.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time (YES or NO)
		<i>Self</i>	Jacksonville University	

Note: We 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.

Verification of 2020 Income Information for Student

Complete part A if you filed a 2020 tax return; complete part B if you did not file a tax return.

A. Tax return filers

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 the end of the 2021 tax year on December 31, 2021.

Instructions: Complete this section if the student and spouse filed a 2020 IRS income tax return(s). *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at FAFSA.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. DRT is not available if married filing separately, if filing a foreign income tax return, or if filing an amended tax return. Contact the financial aid office if more information is needed about using the IRS DRT.

Check the box that applies:

- The student (and spouse) used the IRS DRT in *FAFSA on the Web* to transfer 2020 IRS income tax return information into the student's FAFSA.
- The student (and spouse) have provided the school a **2020 IRS Tax Return Transcript(s)**.
<http://www.irs.gov/Individuals/Get-Transcript>

If the student and spouse filed separate 2018 IRS income tax returns, the IRS DRT cannot be used and a **2020 IRS Tax Return Transcripts** must be provided for both.

A **2020 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.

In most cases, for electronic tax return filers, 2020 IRS income tax return information is available for the IRS DRT or the IRS Tax Return Transcript within 2–3 weeks after the 2020 electronic IRS income tax return has been accepted by the IRS. Generally, for filers of 2020 paper IRS income tax returns, the 2020 IRS income tax return information is available for the IRS DRT or the IRS Tax Return

Transcript within 6–8 weeks after the 2020 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.

B. Non-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.

Note: If amount earned from work is greater than \$12,400 if single, \$24,800 if married under 65, or \$24,800 if widow(er) with a dependent child then you are required to file and must submit an IRS Tax Return Transcript or use the IRS Data Retrieval link in your FAFSA. For more information on tax filing requirements, visit www.irs.gov/publications/p17/.

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.

Employer’s Name	2020 Amount Earned	IRS W-2 Provided?
<i>Suzy’s Auto Body Shop (example)</i>	<i>\$2,000</i>	<i>Yes</i>

Individuals selected for verification that did not file a 2020 IRS income tax return are required to obtain a “Verification of Nonfiling” letter from the IRS. The request for “Verification of Nonfiling” can be obtained online at www.IRS.gov:

1. Click on the “Get Transcript of Your Tax Records” link.
2. Select “Verification of Nonfiling Letter” and follow instructions.

Or you may use IRS Form 4506-T and check box 7 (Form 4506-T must be mailed directly to the IRS).

Please note, a taxpayer may fail to file a tax return even though there is a filing requirement; the verification letter does **not** address whether or not the taxpayer should have filed a tax return.

- Check here if confirmation of nonfiling is provided.

Statement of Educational Purpose

Identity and Statement of Educational Purpose (To Be Signed at the Institution)

The student must appear in person at **Jacksonville University** to verify his or her identity by presenting a 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.

In addition, the student must sign, in the presence of the institutional official, a Statement of Educational Purpose available at Jacksonville University.

If you are unable to appear in person, print the Statement of Educational Purpose from the Financial Aid page of the JU website and complete with a notary. The original completed Statement of Educational Purpose must be mailed to:

Jacksonville University
2800 University Blvd N
Jacksonville, FL 32211

Certifications and Signatures

Each person signing below certifies that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.

Print Student's Name

Student's ID Number

Student's Signature (Required)

Date

Spouses Signature

Date

Save the completed form and return as an email attachment to the appropriate financial aid counselor listed below:

Undergraduate students (Divided by last names)

- Students Last Names A – E
Sherry Steelman sbrugge@ju.edu

- Students Last Names F – L
Tara (Souder) Torres lsouder@ju.edu
- Students Last Names M – Q
Brooke Denslow bsellar@ju.edu
- Students Last Names R – Z
Misty Pippin mpippin1@ju.edu

Graduate students:

- MSLD and OTD programs - Brooke Denslow(bsellar@ju.edu)
- All other graduate programs – Melissa Mack (mmack@ju.edu)