

2014-2015 - V5 Aggregate Verification Group Form



Student's Name _____ Banner ID _____

The best way to verify taxable income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

If an amended 2013 IRS tax return was filed you must provide a signed 1040x Amended US Income Tax Return.

DEPENDENT Students (IF YOU WERE REQUIRED TO INCLUDE PARENT INFORMATION ON THE FAFSA)

List the people in your parents' household, including:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents; and
- All other members of your parents' household, if your parents provide more than half of their support and will continue to provide more than half of their support from 7/1/14 through 6/30/15.

INDEPENDENT Students (IF YOU WERE NOT REQUIRED TO INCLUDE PARENT INFORMATION ON THE FAFSA)

List the people in your household, including:

- Yourself, and your spouse if you have one; and
- Your children, if you will provide more than ½ of their support from 7/1/14 - 6/30/15 and other people if they live with you and you provide more than ½ of their support and will continue to provide more than ½ of their support through 6/30/15.



A. FAMILY INFORMATION

LIST NAMES OF ALL HOUSEHOLD MEMBERS IN THE TABLE BELOW. Also list the name of the college for any family member, excluding your parent(s) that will be enrolled in a degree, diploma, or certificate program between July 1, 2014 and June 30, 2015. If you need additional space, attach a separate page.

First name	Last Name	Age	Relationship	University or College Name	Enrolled at least ½ time
			Self	John Carroll University	YES / NO



B. STUDENT TAX FORM INFORMATION

*If you need a copy of your TAX RETURN TRANSCRIPT contact the I.R.S. <http://www.irs.gov/Individuals/Get-Transcript>

STUDENT (to be completed for dependent and independent students)

Student's Marital Status: ☐ Single ☐ Married ☐ Remarried ☐ Widowed

☐ Legally Separated/Divorced (Date: ____/____/____) ☐ Separated (no court action)

____ I/we have not or are unable to use the IRS Data Retrieval Tool. **Attached is a copy of our SIGNED TAX RETURN TRANSCRIPT for 2013 (if married and filed separately must include SPOUSE) and W2 forms.** **** PROCEED TO NEXT PAGE****

____ I/we have used the IRS Data Retrieval Tool (either initially or when making corrections to the FAFSA) and have not altered any FAFSA tax figures. **Attached are all W2s for 2013.** **** PROCEED TO NEXT PAGE****



C. STUDENT NON TAX FILERS ONLY COMPLETE & SIGN BELOW only if a NON US Tax Filer

____ I/we filed a **foreign** income tax return. **Attached are any W-2 forms for 2013, earnings statements or foreign tax returns to document all sources of 2013 income** (taxable or non-taxable).

____ I/we are not filing and **are not required** to file a 2013 U.S. tax return, **all income received in 2013 is marked below.**

PLEASE IDENTIFY ALL SOURCES OF 2013 INCOME, if additional space is needed, attach a separate page.

Employer(s) / Source(s)	W2 issued?	2013 Amount
	Yes/No	\$
	Yes/No	\$

IF NET EARNINGS EXCEED \$400 A TAX RETURN MUST BE FILED

I/we hereby certify that no US tax return has been filed for 2013 and is not required. All monies received in 2013 are stated above. **Sign below if you DID NOT, WILL NOT and ARE NOT REQUIRED to file a 2013 Federal tax return. Parent signature required if dependent.**

Signature of Student Non-Tax Filer

Signature of Parent (if dependent) OR Spouse Non-Tax Filer (if married)



D. PARENT TAX FORM INFORMATION

*If you need a copy of your TAX RETURN TRANSCRIPT contact the I.R.S <http://www.irs.gov/Individuals/Get-Transcript>

PARENT (only to be completed for DEPENDENT students)

Parents' Marital Status: _____ Married _____ Remarried _____ Separated (no court action) _____ Widowed
 _____ Unmarried and both parents living together _____ Never Married _____ Legally Separated/Divorced (Date: ____/____/____)

_____ I/we have not or are unable to use the IRS Data Retrieval Tool. **Attached is a copy of our SIGNED RETURN TAX TRANSCRIPT for 2013 (if married and filed separately must include BOTH parents) and W2 forms. ****PROCEED TO STEP F******

_____ I/we have used the IRS Data Retrieval Tool (either initially or when making corrections to the FAFSA) and have not altered any FAFSA tax figures. **Attached are all W2s for 2013. ****PROCEED TO STEP F******



E. PARENT NON TAX FILERS ONLY COMPLETE & SIGN BELOW only if a NON US Tax Filer

_____ I/we filed a **foreign** income tax return. **Attached are all W-2 forms for 2013, earnings statements or foreign tax returns to document all sources of 2013 income** (taxable or non-taxable).

_____ I/we are not filing and **are not required** to file a 2013 U.S. tax return, **all income received in 2013 is marked below.**

PLEASE IDENTIFY ALL SOURCES OF 2013 INCOME, if additional space is needed, attach a separate page.

Employer(s) / Source(s)	W2 issued?	2013 Amount
	Yes/No	\$
	Yes/No	\$

IF NET EARNINGS EXCEED \$400 A TAX RETURN MUST BE FILED

I/we hereby certify that no US income tax return has been filed for the 2013 and is not required to be filed. All monies received in 2013 are stated above. **Sign below if you DID NOT, WILL NOT and ARE NOT REQUIRED to file a 2013 Federal Tax Return.**

 Signature of Parent/Stepparent Non-Tax Filer

 Signature of Parent/Stepparent Non-Tax Filer



F. UNTAXED /OTHER INCOME INFORMATION

Please indicate how much of each type of income shown below was received. **Be sure to enter zeros if no funds were received. If entering figure, you must provide DOCUMENTATION FROM THE AGENCY SUPPLYING THE INCOME FOR THE FULL YEAR 2013**

Student/ Spouse	Type of Untaxed Income / Income Received or Paid <i>Enter amounts that represent the full Calendar Year 2013</i>	Parent(s)/ Stepparent
\$	Housing, food & other living allowances paid to members of military, clergy and others (cash payments & cash value of benefits) Include BAS do not include BAH or combat pay (if untaxed)	\$
\$	Veteran's non-education benefits such as Disability, Death Pension, Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
\$	Worker's Compensation, Disability or Railroad benefits not included in AGI.	\$
\$	Other untaxed income. Including money a student received from a parent whose financial information is not reported on the FAFSA. Identify source_____.	\$



G. CHILD SUPPORT PAID / CHILD SUPPORT RECEIVED

Was child support **paid** or **received** in 2013 on behalf of any child? Yes No (CIRCLE ONE)

How much did you pay in 2013 \$ _____ How much did you receive in 2013 \$ _____

Please list the child(ren) for whom this support was paid: _____

Name of person to whom child support was paid: _____

Name of person who paid child support: _____

In addition you must submit one of the following:

- 1) A statement from the County Agency showing the amount of child support received in 2013 **(01/01/2013-12/31/2013)**.
- 2) End of year **2013 pay stub** from parent who PAID support showing amount withheld, do not include alimony.



H. Food Stamps / SNAP benefits

Supplemental Nutrition Assistance Program (SNAP) may be known by another name in some states, for assistance in determining the name used in a state please call 1-800-4FEDAID

- ☐ I received Food Stamps or SNAP benefits during 2012 or 2013.
- ☐ My parents received Food Stamps or SNAP benefits during 2012 or 2013.
- ☐ Another member of my family received Food Stamps or SNAP benefits during 2012 or 2013.

Name of family member who received benefits: _____

Name of the beneficiary of these benefits: _____

Please attach documentation from the agency that issues the Food Stamps/SNAP food benefits to verify these benefits. If you are an Ohio resident, the ODJFSBenefits.ohio.gov website can be used to verify benefits or contact your social worker.

☐ No one in my household received Food Stamps or SNAP benefits during 2012 or 2013. Please update my FAFSA.



I. High School Completion Status

Provide one of the following documents that indicate the student's high school completion status.

- 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 or GED transcript;
- 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;
- If state law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential; or
- If state law does NOT require a homeschooled student to obtain a secondary school completion credential for homeschool (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 documents the successful completion of a secondary school education in a homeschool setting.



J. Certification

*By signing this certification, I/we confirm that all information reported on this Verification Form in support of the student's application for financial assistance is complete and correct. **If we have amended our taxes we will submit a copy of the 1040X.***

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. FAILURE TO COMPLETE ALL SECTIONS AND PROVIDE NECESSARY DOCUMENTS WILL DELAY PROCESSING OF YOUR AID.

Student Signature

Date

Parent Signature (dependent students only)

Date

Student's E-mail Address

Parent's E-mail Address



K. Identity and Statement of Educational Purpose

TO BE SIGNED AT THE INSTITUTION

The student must appear in person at John Carroll 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 with the date it was received 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, the following:

Statement of Educational Purpose

I certify that I _____ am the individual signing this Statement of
(Print Student's Name)

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 John Carroll University for the 2014-2015.

(Student's Signature)

(Date)

(Student's ID Number)

Name of school official collecting the documentation _____

Date _____