

# 2016-2017-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 2015 IRS income tax information into the student's FAFSA. It takes up to two weeks after filing 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 2015 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 another members' support and will continue to provide more than half of another members' support from 7/1/16 through 6/30/17 AND who now live & will continue to live with your parents. Include children who meet the support standard even if the child does not live with the parents.

## 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 7/1/16 - 6/30/17 and other people if they live with you and you provide more than ½ of their support and will continue to provide more than half of their support through 6/30/17.



## A. FAMILY INFORMATION

**LIST NAMES OF ALL HOUSEHOLD MEMBERS from the above description (even those not in college) IN THE TABLE BELOW** Also list the name of the college and enrollment status for any family member, excluding your parent(s) that will be enrolled in a degree, diploma, or certificate program between July 1, 2016 and June 30, 2017. 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 IRS <https://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 2015 (if Married and filed separately need return transcripts for both) 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 2015.** \*\*\*\* 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 W2 forms for 2015, earnings statements or foreign tax returns to document all sources of 2015 income** (taxable or non-taxable).

\_\_\_\_\_ I/we are not filing and are not required to file a 2015 U.S. tax return, all income received in 2015 is marked below.

**PLEASE IDENTIFY ALL SOURCES OF 2015 INCOME EVEN IF A W2 WAS NOT ISSUED, if additional space is needed, attach a separate page.**

Employer(s)/Source(s)	W2 issued?	2015 Amount
	Yes/No	\$
	Yes/No	\$

IF NET EARNINGS from non W2 sources EXCEED \$400 A TAX RETURN MUST BE FILED. WE MAY REQUIRE YOU TO DOCUMENT THAT A 2015 TAX RETURN WAS NOT FILED OR REQUIRED. I/we hereby certify that no US tax return has been filed for 2015 and is not required. All monies received in 2015 are stated above. **Sign below if you DID NOT, WILL NOT and ARE NOT REQUIRED to file a 2015 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 IRS <https://www.irs.gov/Individuals/Get-Transcript>

**PARENT (only to be completed for DEPENDENT students)** This section should be completed with information from the parent with whom you filed the 16-17 FAFSA. The parent you lived with most during the 12 months prior to completing the original 16-17 FAFSA.

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 2015 (if Married and filed separately need return transcripts for 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 2015. \*\*\*\*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 W2 forms for 2015, earnings statements or foreign tax returns to document all sources of 2015 income** (taxable or non-taxable).

I/we are not filing and are not required to file a 2015 U.S. tax return, all income received in 2015 is marked below.

**PLEASE IDENTIFY ALL SOURCES OF 2015 INCOME EVEN IF A W2 WAS NOT ISSUED, if additional space is needed, attach a separate page.**

Employer(s)/Source(s)	W2 issued?	2015 Amount
	Yes/No	\$
	Yes/No	\$

IF NET EARNINGS from non W2 sources EXCEED \$400 A TAX RETURN MUST BE FILED. WE MAY REQUIRE YOU TO DOCUMENT THAT A 2015 TAX RETURN WAS NOT FILED OR REQUIRED. I/we hereby certify that no US income tax return has been filed for 2015 and is not required to be filed. All monies received in 2015 are stated above. **Sign below if you DID NOT, WILL NOT and ARE NOT REQUIRED to file a 2015 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 2015.**

Student/ Spouse	Type of Untaxed Income/Income Received or Paid <i>Enter amounts that represent the full Calendar Year 2015</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.	\$
\$	Report untaxed portions of health savings accounts from IRS Form 1040 Line 25	\$
\$	Worker's Compensation, Disability or Railroad benefits not included in AGI.	\$
\$	List any payments (direct or withheld from earning) to tax-deferred pension and retirement savings plans, including but not limited to the amount reported in boxes 12 a - 12d with codes D,E,F,G,H and S	\$
\$	Other untaxed income. Including money or amounts on the student's behalf received from a parent grandparent whose financial information is not reported on the FAFSA. Identify source _____.	\$
\$	Taxable student grant & scholarship aid reported to the IRS in your AGI or Taxable earnings from Federal Work Study programs SUBMIT 2015 FEDERAL 1040	\$



## G. CHILD SUPPORT PAID/CHILD SUPPORT RECEIVED

Was child support **paid** or **received** in 2015 on behalf of any child?  Yes  No

How much did you pay in 2015 \$ \_\_\_\_\_

How much did you receive in 2015 \$ \_\_\_\_\_

Name

Age

List the child(ren) for whom this support was paid and **their age**:

\_\_\_\_\_

\_\_\_\_\_

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 2015 **(01/01/2015-12/31/2015)**.
- 2) End of year **2015 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 2014 or 2015.

\_\_\_ My parents received Food Stamps or SNAP benefits during 2014 or 2015.

\_\_\_ Another member of my family received Food Stamps or SNAP benefits during 2014 or 2015.

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 2014 or 2015. If I erroneously marked yes on the FAFSA, I give JCU permission to update my FAFSA.



## I. High School Completion Status

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

- (a) A copy of the student's high school diploma;
- (b) A copy of the student's final official high school transcript that shows the date when the diploma was awarded;
- (c) A copy of the student's General Educational Development (GED) certificate or GED transcript;
- (d) 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;
- (e) 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
- (f) 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

Must be signed by hand in ink

*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 Educational Purpose  
(Print Student's Name)

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 2016-2017.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Student's ID Number)

Name of school official collecting the documentation \_\_\_\_\_

Date \_\_\_\_\_

Make sure the photo identification presented has not expired.