

# 2023-2024 V5 Aggregate Verification Worksheet

Your application was selected, by the Federal Government, for review in a process called "Verification." In this process, Southern will be comparing what was entered on your FAFSA with your tax return information, with W-2 forms or other financial documents. If you are a dependent student we will also ask for your parents 2021 Federal tax return.

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA on the Web at FAFSA.gov. If there are differences between your application information and your financial documents, Southern may need to make electronic corrections. Your initial award and changes can be viewed by logging into your account on the Financial Aid Self Service website through myaccess.southern.edu.

#### What you should do

- 1. If you did not use the IRS Data Retrieval on your FAFSA, you must submit a 2021 tax return transcript or a signed copy of your tax return.
- 2. Complete and sign this worksheet. <u>Parent signature</u> is needed for dependent students).
- **3.** Submit the completed worksheet, tax forms, and any other requested documents to the financial aid office as soon as possible.

Completed verification documents must be submitted no later than the final week of the currently enrolled semester to ensure federal aid can be processed. Failure to complete the verification process will result in the loss of federal aid and in some cases, state and institutional aid as well.

A. Student Information	
Full Name:	Last 4 SSN:
Home Address:	: Date of Birth:
City:	State: Zip Code:
Phone Number:	E-mail Address:

#### B. Household Size and Number in College

#### Dependent Student

List the people in your parent(s) household, including:

- Yourself and your parent(s) (including step-parent), even if you don't live with your parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2023, through June 30, 2024, or if the other children would be required to provide parental information if they were completing a FAFSA for 2023-2024. Include children who meet either of these standards, even if a child does not live with the parents.
- 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, 2024.

#### Independent Student

List the people in your household; including:

- Yourself, and your spouse, if married
- Your children, if any, if you will provide more than half of their support from July 1, 2023 through June 30, 2024.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024.

Write the names of all household members in the space(s) below. Also write in the name of the college for any household member, excluding your parent(s), who will be attending at least half time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	Name of College (if applicable)	Will be enrolled at least half time (Yes or No)

C	Stu	dent's	Income	Inforn	nation
u.	JLUI				Iauvii

<ol> <li>TAX RETURN NON-FILERS – Complete this section if the income tax return with the IRS. Check the box that applies:</li> <li>The student was not employed and had no income earn</li> </ol>		required to file a 2021
☐The student was employed in 2021 and has listed below	v the names of all students' er	nployers, the amount
earned and whether an IRS W-2 form is attached. List e	every employer even if they di	d not issue an IRS W-
2 form. If more space is needed, attach a separate page	Э.	
Employer's Name	2021 Amount Formed	IRSW-2 Attached?
Employer's Name Suzy's Auto Body Shop (example)	2021 Amount Earned \$2000.00 (example)	Yes (example)
Cuzy o riate Body errop (oralinpro)	φ <b>2</b> σσσισσ (σκαιτιρισ)	i es (example)
2. TAX RETURN FILERS – Important Note: If the student fi student must contact the financial aid office before completing		021 IRS tax return, the
Check the box that applies:		
☐ The student <u>has used</u> the IRS Data Retrieval Tool in FAFS IRS income information into the student's FAFSA, either on the to the FAFSA.		
☐ The student has not yet used the IRS Data Retrieval Tool and transfer 2021 IRS income information.	in FAFSA on the Web, but wi	Il use the tool to retrieve
☐ The student is <u>unable or chooses not to use</u> the IRS Data to the school a <b>2021 IRS tax return transcript</b> or a signed <b>return transcript</b> , <b>go to </b> <u>www.irs.gov/Individuals/Get-Transcript</u>	copy of the income tax return	n. <b>To obtain an IRS tax</b>
☐ Check here if the student's IRS tax return transcript in	is attached to this workshee	et.
☐ Check here if the student's IRS tax return transcript	will be submitted to the stud	lent's school later.
D. Parent's Income Information (for Dependent Students	5)	
1. TAX RETURN NON-FILERS – Complete this section if the	parent will not file and is not r	equired to file a 2021
income tax return with the IRS. Check the box that applies:		
$\Box$ The parent was not employed and had no income earne		
☐The parent was employed in 2021 and has listed below	•	•
amount earned and whether an IRS W-2 form is attached. Lis		did not issue an
IRS W-2 form. If more space is needed, attach a separate page	9	150111 0 111
Employer's Name Suzy's Auto Body Shop (example)	2020 Amount Earned \$2000.00 (example)	IRS W -2 Attached? Yes (example)
Ouzy & Auto Body Onop (Cxample)	Ψ2000.00 (ελαπριε)	res (example)
<ol><li>TAX RETURN FILERS – Important Note: If the parent filed the parent must contact the financial aid office before comp</li></ol>		.1 IRS tax return,
Check the box that applies:		
☐ The parent <u>has used</u> the IRS Data Retrieval Tool in FAFS IRS income information into the student's FAFSA, either on the to the FAFSA.		
☐ The parent has not yet used the IRS Data Retrieval Tool in retrieve and transfer 2021 IRS income information.	n FAFSA on the Web, but will	use the tool to

The parent is <u>unable or choo</u> the school a <b>2021 IRS tax ret</b> turn transcript, go to <u>www.ir</u>	urn transcript or a signed	copy of the income	tax return. 7	To obtain an IRS tax
□Check here if the parent's □Check here if the parent's E. Child Support Payments		•		
☐ Check here if you or an	yone else in Section B o		AID child	
Name of person who paid Child Support	Name of person to whom Child Support was paid	Name of child to Child Support		Amount of Child Support paid in 2021
Marty Jones (example)	Chris Smith (example)	Terry Jones (e		\$6000.00 (example)
		,	. ,	` · · /
	oort was <u>RECEIVED</u> in 20 se provide information l		children	
Name of Adult who received the Child Support		whom Support was eived	Amount of Child Support received in 2021	
Marty Jones (example)	Chris Smith (exam			.00 (example)
High School Completion S	Status			
abmit your high school transcript aduation occurs. Mark the box of	that includes a graduation d the type of document you w	vill be submitting.	, ,	please wait until after your
☐ Transcript with graduati	on date has already been st	ubmitted to Southern	Advertist on	iliversity's Admissions Office
		OR		
☐ Copy of the student's hi	gh school diploma			
	transcript that included the	date the high school	diploma was	awarded
☐ A secondary school cor	npletion credential for home	school provided for	under State L	.aw
☐ Transcript or the equiva	lent, signed by the parent of	r guardian responsib	le for homeso	chooling, that lists the secondar
school courses completed	by the applicant and docum	ents the completion	of a secondar	ry school education
☐ General Education Dev	elopmental Certificate (GED	<b>)</b> )		
_	y the state as an equivalent	·		
☐ Academic transcript that	t shows completion of at lea	ast a two-year progra	m acceptable	for credit towards a BS degre

### G. Statement of Educational Purpose

Do not complete this section in advance. This section must be completed and signed:

- In the presence of an approved representative of the Financial Aid Office if you are submitting this paperwork in person to the Financial Aid Office; or
- In the presence of a Notary Public if you are not submitting this paperwork to the Financial Aid Office

I certify that I	nt financial assistance I m	signing this Statement of pay receive will only be used ntist University for the
Statement of Educational Purpose		
In addition, you must sign, in the presence of the	institutional official, the f	following:
You must appear in person at <u>Southern Adventise</u> valid government-issued photo identification (ID) state-issued ID, or passport. The institutional will with the date it was received and the name of the ID.	st University to verify you such as, but not limited maintain a copy of your e official at the institution	identity by presenting a to, a driver's license, other photo ID that is annotated authorized to collect your
	g in the Financial Aid Office	3)

## **Identity and Statement of Educational Purpose** (Complete only if signing in the Financial Aid Office)

If you are unable to appear in person at <u>Southern Adventist University</u> to verify your identity you must provide:

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

Statement of Educational Purpose		
I certify that I	am the individ student financial assistance ost of attending <u>Southern Ad</u>	ual signing this Statement of I may receive will only be used ventist University for the
Student's Signature	Student ID #	Date
Notary's Cer	tificate of Acknowledgeme	ent
State of		
City/County of		
On, before no (Date) personally appeared,	(Notary's Name), and provided to be the abo	to me on basis of satisfactory
WITNESS my hand and official seal (seal)	(Notary signature)	
My commission expires on(Date)		
H. Certifications and Signatures		
Each person signing this form certifies that all the least one parent (if student is dependent) must significant misleading information on this worksheet, you	gn and date. <b>WARNING: If you p</b> u	rposefully give false or
Student	Date S	AU ID #
Parent (dependent students only)	 Date	