

# 2023-2023 Independent V5 Verification Form



This document is needed to satisfy your verification requirement. Please complete this form and return with all necessary documents. Visit our website, [www.jcu.edu/sefs](http://www.jcu.edu/sefs) for further instructions.

Student's Name: \_\_\_\_\_

JCU ID: \_\_\_\_\_

Home Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

If you filed a 2021 federal tax return, you must verify taxable income, choose one of the three methods to request your tax documents:

## **METHOD 1 Select the IRS retrieval process (IRS DRT) link through FAFSA on the Web.**

1. Go to [fafsa.gov](http://fafsa.gov) and make a correction to your existing FAFSA.
2. In the Financial Information tab there will be an option to Link to IRS, if you qualify.
3. Follow the instructions and make sure to submit your correction.

## **METHOD 2 Request TAX RETURN TRANSCRIPT through the IRS.**

*If you are married and filed separately you need to request two transcripts, one for you and one for your spouse.*

1. <http://www.irs.gov/Individuals/Get-Transcript>
2. Call 1-800-908-9946 request by the automated system.

## **METHOD 3 Submit your FEDERAL TAX RETURN.**

1. Submit an exact SIGNED copy of the 2021 Federal Tax Return (with schedules) you submitted to the IRS. If you filed separately from your spouse, submit both returns.

OR

If you are a nontax filer you must verify non-filing status, this document comes directly from the IRS. Use Form 4506T. Make sure to check "verification of non-filing" and enter year 2021. Skip Section A

## **A. Student Tax Filer Status**

*Tax documents refer to requesting a Tax Return Transcript from the IRS or submitting a signed, paper 2021 Federal Tax Return with all schedules.*

**Check one:** **Note: If married but filed taxes separately, tax documents are required for both individuals**

<input type="checkbox"/>	I used IRS Data Retrieval Tool & have not altered FAFSA tax figures. <b>Submit all 2021 W2 and Sched Cs</b>	<b>Skip Section B</b>
<input type="checkbox"/>	I have amended taxes for 2021. <b>Attach signed 1040X, 2021 TAX DOCUMENTS and all W2 forms.</b>	<b>Skip Section B</b>
<input type="checkbox"/>	I have filed taxes and did not use DRT. <b>Attach 2021 TAX DOCUMENTS and W2 forms</b>	<b>Skip Section B</b>
<input type="checkbox"/>	I did not file a 2021 federal tax return. - <b>Complete Section B and submit requested documents.</b>	

## **B. Student Non-Filer Status**

*Non-filing is verified by requesting a "Verification of Non-filing" letter from the IRS. Letter must be dated on or after 10/1/22.*

**Please visit [www.jcu.edu/aid](http://www.jcu.edu/aid) for detailed steps you must take to receive this document from the IRS.**

**Check one:**

<input type="checkbox"/>	I filed a <b>foreign</b> income tax return for 2021. I have attached all W-2 forms, earning statements, and foreign tax returns. The chart below represents all of my earnings. I will provide additional documents as requested.
<input type="checkbox"/>	I did not, will not, and am not required to file a 2021 U.S. tax return. The chart below represents all of my earnings.
<input type="checkbox"/>	I was not employed and had no income from any source in 2021. Complete the chart below. with N/A

**LIST 2021 INCOME from all employers even if a W2 or 1099 was not issued & submit a "Verification of Non-filing letter" from the IRS.**

Employer(s)/Source(s)	Was a W2/1099 issued?	2021 Amount
	Yes / No	\$
	Yes / No	\$
	Yes / No	\$

**I certify through my signature that I DID NOT, WILL NOT and AM NOT REQUIRED to file a 2021 Federal tax return. All income and earnings from 2021 are reported above.**

Signature of Student Non-Tax Filer (sign manually with pen)

Signature of Spouse Non-Tax Filer (sign manually with pen)

### C. Family Household/Number in College

List the people in your household, including:

- Yourself and your spouse if you are married;
- Your children (or spouse's children) if they will receive more than ½ of their support from you from 7/1/23 – 6/30/24, even if they do not live with you but not children for whom child support is paid and reported on FAFSA or foster children.
- All other members of your household, if they now live & will continue to live with you AND you provide more than ½ of their support from the 7/1/23-6/30/24.

**LIST THE FULL NAMES OF ALL HOUSEHOLD MEMBERS from the above description (even those not in college) in the chart BELOW.** List the name of the college and enrollment status for any family member that will be enrolled in a degree, diploma, or certificate program between July 1, 2023 and June 30, 2024. If you need additional space, attach a separate page.

First Name	Last Name	DOB	Relationship	University Name	Enrolled at least ½ time? If left blank we will assume NO.
			Self	John Carroll University	Yes / No

### D. Marital Status

Marital Status of **STUDEN** Check the status and where appropriate list date of status.

Status		Date	
Please Check:		Month	Year
	Never Married	N/A	N/A
	Married		
	Separated (no court action) and living apart		
	Legally Separated/Divorced and living apart		
	Widowed and not remarried		

### E. Child Support

Was child support RECEIVED or PAID in the CALENDAR year 2021 for any member of your household? (check one)

\_\_\_\_\_ YES complete the section below

\_\_\_\_\_ NO skip to Section F

Please indicate how much of each type of income shown below was received or paid. **If the amount reported on this form conflicts with the amount reported on the FAFSA YOU WILL BE REQUIRED TO PROVIDE ADDITIONAL INFORMATION.**

Amount of child support <b>paid</b> in calendar year 2021 for children <b>not included on the FAFSA</b> . List name & age of child for whom this support was paid. If additional lines are needed, please attach a separate sheet.		\$ DO NOT LEAVE BLANK
Name of Child	Age	
Amount of child support <b>RECEIVED</b> in calendar year <b>2021</b> for <b>ALL</b> children reported on the FAFSA.		\$ DO NOT LEAVE BLANK

## F. Identity and Statement of Education Purpose

### 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 an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state issued ID, or US 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 receive and review the student's ID.

In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

#### Statement of Educational Purpose

I certify that I \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and  
(Print Student's Name)  
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 2023-2024.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
JCU ID

Signature of official collecting the documentation: \_\_\_\_\_ Date: \_\_\_\_\_

*Please make sure the driver's license, government issued ID or passport is not expired. An unexpired valid government-issued photo identification is one that is issued by the U.S. government, any of the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, a federally recognized American Indian and Alaska Native Tribe, American Samoa, Guam, the Virgin Islands, the Commonwealth of the Northern Mariana Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or the Republic of Palau.*

**If you are not able to appear in person you must provide:**

- (a) A copy of your unexpired valid government-issued photo ID that is acknowledged in the notary statement below, or that is presented to a notary and**
- (b) The original Statement of Educational Purpose provided above must be notarized. The Notary must insert their certificate of acknowledgement in the space below.**

## G. Certification

By signing this certification, I/we confirm that all information reported on this form in support of the student's application for financial aid is complete & correct. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.**

\_\_\_\_\_  
Signature of Student (sign manually with pen)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Spouse (sign manually with pen)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's Email Address

**JCU will compare the FAFSA with the information on this worksheet and other required documents, any differences will be corrected which may result in a change to the financial aid award.** This form and documentation can be faxed to 216-397-3098 and should be returned within 15 days of receipt.