

Aggregate Verification Worksheet (V5) 2022-2023

Your application for financial aid was selected for verification. Verification is a process mandated by the U.S. Department of Education, which requires Franciscan University to compare information from your FAFSA application with this worksheet and your financial documents, and to request additional information if necessary. If there are discrepancies between your application and your financial documents, corrections to your FAFSA may be required.

Section 1. Student Information

Student's Full Name

Student ID #

Permanent Address

City

State

ZIP Code

Date of Birth

Phone Number (Mobile)

e-mail address

Section 2. 2020 Federal Tax Filing Status

In order to make changes to your FAFSA and/or verify the tax information reported on your FAFSA, the Department of Education requires that we review your tax record for the year in question, as supplied directly by the IRS. **The easiest way to supply this information is to use the IRS Data Retrieval Tool when you fill out the FAFSA.** Even if you have already completed the FAFSA without the Retrieval Tool, you can still make amendments to the FAFSA by linking information using the Retrieval Tool. If you were ineligible or unable to use the Retrieval Tool, you will need to order a Tax Return Transcript directly from the IRS, using the instructions on page 2. Please make sure to order it sent directly to you, NOT to Franciscan University. Then mail or scan and email us the Tax Return Transcript, along with the student's name and student ID number for timeliest processing. **PLEASE NOTE: We cannot accept copies of a 1040.**

2a. Dependent Students

***PLEASE NOTE: For financial aid purposes, a dependent student is a student who is NOT one of the following:** at least 24 years old, married, a graduate or professional student, a veteran, a member of the armed forces, an orphan, a ward of the court, someone with legal dependents other than a spouse, an emancipated minor or someone who is homeless or at risk of becoming homeless. **If you meet one of those requirements, please skip ahead and fill out section 2b instead. If you are a dependent student, fill out section 2a instead of section 2b.**

Student Filing Status

Check one of the following:

- I used the IRS Data Retrieval Tool on the FAFSA and did not change the information
- I am attaching my 2020 IRS Tax Return Transcript
- I filed an amended 2020 Tax Return. If you select this option, you must submit a Tax Account Transcript and a Tax Return Transcript
- I will not file and am not required to file a 2020 U.S. Income Tax Return (**NOTE: you must submit copies of all 2020 W2's**)
- I did not file a 2020 Tax Return and did not have earnings in 2020



Parent(s) Filing Status

Check one of the following:

- My parent(s) used the IRS Data Retrieval Tool on the FAFSA and did not change the information
- My parent(s) are attaching their 2020 IRS Tax Return Transcript
- My parent(s) filed an amended 2020 Tax Return. If you select this option, they must submit a Tax Account Transcript and a Tax Return Transcript
- My Parent(s) will not file and are not required to file a 2020 U.S. Income Tax Return (**NOTE: you must submit copies of all 2020 W2's and submit the verification of income form, available through the documents section of your MyFranciscan account**)
- My parent(s) did not file a 2020 Tax Return and did not have earnings in 2020 (**NOTE: You must also submit the verification of income form, available through the documents section of your MyFranciscan**)

2b. Independent Students

*PLEASE NOTE: Only fill out this section if you meet the requirements for an independent student listed above section 2a. If you do not meet the requirements, you should fill out 2a instead.

Student (& Spouse) Filing Status

Check one of the following:

- I used the IRS Data Retrieval Tool on the FAFSA and did not change the information
- I am attaching my 2020 IRS Tax Return Transcript
- I filed an amended 2020 Tax Return. If you select this option, you must submit a Tax Account Transcript and a Tax Return Transcript
- I will not file and am not required to file a 2020 U.S. Income Tax Return (**NOTE: you must submit copies of all 2020 W2's) and submit the verification of income form (available through the documents section of your MyFranciscan account)**)
- I did not file a 2020 Tax Return and did not have earnings in 2020 (**NOTE: You must also submit the verification of income form, available through the documents section of your MyFranciscan**)

Ordering a Federal Tax Return Transcript via IRS.GOV

1. Go to www.IRS.gov and click on the “Order a Return or Account Transcript” link. Make sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.”
2. You will need to provide your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the IRS tax return was filed). [**Please note:** *To order a printed copy of your transcript, only these first two steps are necessary. To order an electronic copy of your transcript, step three is also required.*]
3. You will also need to answer a series of identity-confirming questions. This may include providing a credit card number (although you will not be asked to pay anything), a mortgage number, loan account number, etc. Usually the IRS income information will be available immediately; however, it can take up to two weeks for it to come available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.

Ordering a Federal Tax Return Transcript via Phone Interface

1. Call 800-908-9946. This will connect you to an automatic system to request your transcript.
2. Press 1 to continue in English, or 2 to continue in Spanish.
3. Follow the prompts to provide your social security number and the street address you filed your taxes under.
4. Choose option 2 on the following menu.
5. Enter the tax year you would like a transcript for.
6. Wait 5 to 10 days for the transcript to arrive by mail.



Section 3. Household Information

***PLEASE NOTE:** Your reporting in this section will vary depending on your dependency status. A student may or may not be considered independent if they are not supported financially by their parents – there are other conditions that must be met to claim independent status. If you are unsure whether you are dependent or independent, please review the criteria in section 2 above.

Dependent Students (if you filled out section 2a): Carefully read the following instructions, and in the table below, report:

- Yourself
- Your parents, including step-parents, even if you do not live with your parents. Do not include your non-custodial parent
- Your parent(s)' other dependent children if; your parent(s) will provide more than half of their support from July 1, 2022 through June 30, 2023 or if the other children would be required to provide parental information if they were completing a FAFSA for 2022-2023. Include children who meet either of these standards even if the children do not live with the parents
- Other people only if they now live with your parent(s) and your parent(s) will provide more than half of their support from July 1, 2022 through June 30, 2023
- Provide college information for those students attending at least half-time during 2022-2023 in a program leading to a degree, diploma, or certificate

Independent Students (if you filled out section 2b): Carefully read the following instructions, and in the table below, report:

- Yourself
- Your spouse (if you are married)
- Your children if you will provide more than half of their support from July 1, 2022 through June 30, 2023
- Other people only if they live with you and you or your spouse provide more than half of their support and will continue to do so from July 1, 2022 through June 30, 2023. Provide college information for those students attending at least half-time during 2022-23 in a program leading to a degree, diploma, or certificate

***PLEASE NOTE:** If more space is needed, attach a separate sheet.

Full Name	Age	Relationship to Student	College Name/Grade Level

Section 4. Educational Purpose Statement (Required)

I certify that I _____ am the individual signing this Statement of 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 Franciscan University of Steubenville for 2022-2023.

Student's Signature

Date



Section 5. High School Completion

Provide **one** of the following documents to indicate the student's high school completion status when the student begins college in 2022-2023:

- A copy of the student's high school diploma
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded
- A state certificate or transcript received by a student after the student passed a State-authorized examination that the State recognizes as the equivalent of a high school diploma (GED test, HiSET, TASC, or other State-authorized examination)
- 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
- For a student who was homeschooled in a state where state law requires the student to obtain a secondary school completion credential for homeschooling (other than a high school diploma or its recognized equivalent), a copy of that credential. For a student who was homeschooled in a state where state law does not require the student to obtain a secondary school completion credential for homeschooling (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 includes a statement that the student successfully completed a secondary school education in a homeschool setting.

Section 6. Student Identity Verification (Complete A or B)

A. Complete **in person** at Franciscan University of Steubenville:

- The student must appear in person at Franciscan University of Steubenville to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as 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 receive and review the student's ID.
- Statement of Educational Purpose provided, which must be notarized

Student Signature

Date Document Received

The valid government issued documentation attached was presented in person and reviewed by the staff member below. I certify that the attached copy is a true and accurate representation of the student's government issued identification.

Financial Aid Officer Signature

Date Document Received



B. Complete if the student is **not able to appear in person** at Franciscan University of Steubenville by providing the following documentation with notarized signature:

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

NOTARY'S CERTIFICATE OF ACKNOWLEDGEMENT

State of _____ City/County of _____ on _____, before me,
 _____, personally appeared _____ and provided to me on the basis of
(Notary's Name) (Printed name of signer)
 satisfactory evidence of identification _____ to be the above-named person who signed
(Type of government-issued photo ID provided)
 the foregoing instrument.

(Seal) (Notary Signature) Commission expires _____
(Date)

Section 7. Signatures (Required for All)

I affirm that all information reported on this form and any attachment hereto is true, complete, and accurate to the best of my knowledge. I understand that if I purposely give false or misleading information in order to obtain federal funds, I may be subject to a \$10,000 fine, prison sentence, or both.

Student

Date

Parent (if dependent)

Date

***DO NOT** submit this document to the U.S. Department of education. Return it to the Financial Aid Office at Franciscan University.

