



University of the Virgin Islands - Office of Financial Aid

2022-2023 AGGREGATE Verification Worksheet

V5
Independent

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Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. Federal law states that before any Federal Student aid can be awarded, you and your spouse, *if married*, must provide copies of **2020 Tax Return transcript(s) or a signed copy of the 2020 tax return, applicable schedules and W-2 form(s) or Verification of Non-Filing Letter and other required documents** to your school. The documents will be used to verify that the information reported on your FAFSA is correct. Any discrepancies will result in revision of your FAFSA. You must complete and sign the worksheet, attach all required documents, and submit to the University of the Virgin Islands Financial Aid Office. If you have questions about verification, contact us at financialaidstx@uvi.edu or 340-692-4193, St. Croix or at financialaidstt@uvi.edu 340-693-1090, St. Thomas.

What you should do

1. Talk to your financial aid administrator if you have any questions about completing this worksheet.
2. Complete and sign the worksheet.
3. Submit the completed worksheet, **2020 Tax Return transcript(s) or a signed copy of the 2020 tax return, applicable schedules**, W-2 form(s) and any other required documents your school requests to your financial aid administrator.
4. Your financial aid administrator will compare information on this worksheet and any supporting documents with the information you submitted on your FAFSA. You or your school may need to make corrections electronically or by using your Student Aid Report (SAR).

*** Tax filers must submit the 2020 Tax Return transcript(s) or a signed copy of the 2020 tax return, applicable schedules and W-2 form(s)**

*** Non-tax filers must submit a Verification of Non-Filing Letter from the IRS**

A. Student's Information

Last Name _____ First Name _____ M.I. _____ Last 4 Digits of SSN _____ ID Number _____
 Mailing Address _____ Date of Birth _____
 City _____ State _____ Zip Code _____ Email Address _____
 Home Phone Number (include area code) _____ Alternate or Cell Phone Number _____

B. Student's Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2022 through June 30, 2023, or if the child would be required to provide your information if they were completing a FAFSA for 2022-2023. Include children who meet either of these standards, even if they do not live with you.
- Other people if they now live with you, you provide more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.

Include the name of the college for any household member who will be enrolled, least half time (six credit hours), in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2022 and June 30, 2023. **If more space is needed, attach a separate page with the student's name and UVI student ID number at the top.**

Full Name	Age	Relationship	College/University	Will be Enrolled at least half time (6 or more credits)
Marty Jones (example)	28	Spouse	Central University	Yes
		Self	University of the Virgin Islands	

Note: Additional documentation for the household member(s) enrolled at an eligible postsecondary educational institution may be required.

C. Student | 2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules

2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules

To request an official 2020 Tax Return Transcript or Verification of Non-Filing Letter

1. **For U. S. Virgin Islanders Tax Filers:** Form 4506T must be completed and signed by the taxpayer or non-filer and submitted to the Bureau of Internal Revenue (BIR) offices. You may also contact the VI BIR offices for assistance: St. Croix – (340) 773-1040; St. Thomas – (340) 715-1040; St. John – (340) 777-1446.
2. **For U.S Tax Filers:** Complete Form 4506T online at www.irs.gov or call 1-800-908-9946.
 - Check here if you are attaching your **W-2 Form(s) and 2020 IRS Income Tax Return or Tax Return Transcript**
 - Check here if you are attaching your **Verification of Non-Filing Letter** because you will not file or were not required to file; or were not employed and had **no income earned** from work in 2020.
3. If you did not file and are not required to file a 2020 Federal income tax return, *list below your employer(s), even if you were not issued an IRS W-2 Form.*

Employer's Name or Source of Income (<i>Money received or paid on your behalf to include housing, food, living allowances</i>)	IRS W-2 Attached Yes/No	2020 Income
		\$
		\$
		\$

4. Funds received for child support and other untaxed income (See question 44 on the FAFSA.)

Sources of Untaxed Income	2020 Amount	Sources of Untaxed Income	2020 Amount
a. Child support received	\$	e. Workman's Compensation	\$
b. Tax exempt (IRS form 1040 – Line 2a)	\$	f. Veterans non-education benefits	\$
c. Untaxed IRA distributions (IRS form 1040-line 4a minus 4b)	\$	g. Payments to pension (W-2 boxes 12a through 12d, codes D, E, F, G, H & S)	\$
d. Untaxed IRA pensions & annuities (IRS form 1040-line 5a minus 5b)	\$		

D. Spouse | 2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules

2020 IRS Tax Return Transcript(s) or a signed copy of the 2020 income tax return and applicable schedules

To request an official 2020 Tax Return Transcript or Verification of Non-Filing Letter

1. **For U. S. Virgin Islanders Tax Filers:** Form 4506T must be completed and signed by the tax payer or non-filer and submitted to the Bureau of Internal Revenue (BIR) offices. You may also contact the VI BIR offices for assistance: St. Croix – (340) 773-1040; St. Thomas – (340) 715-1040; St. John – (340) 777-1446.
2. **For U.S Tax Filers:** Complete Form 4506T online at www.irs.gov or call 1-800-908-9946.
 - Check here if you are attaching your and your spouse's **W-2 form(s) and joint tax 2020 IRS Income Tax Return or Tax Return Transcript.**
 - Check here if you are attaching your spouse's **W-2 form(s) and 2020 IRS Income Tax Return or Tax Return Transcript** if your spouse filed a separate tax return.
 - Check here if your spouse is attaching a **Verification of Non-Filing Letter** because he/she will not file or were not required to file; or he/she was not employed and had **no income earned** from work in 2020.
3. **(a)** If your spouse did not file and is not required to file a 2020 Federal income tax return, *list below your spouse's employer(s) and income received in 2020, even if your spouse was not issued an IRS W-2 Form.* **(b).** *If your spouse was not employed and had no income earned from work in 2020, list the source(s) of any income your household received in 2020.*

Employer's Name or Source of Income (<i>Money received or paid on your behalf to include housing, food, living allowances</i>)	IRS W-2 Attached Yes/No	2020 Income
		\$
		\$
		\$

4. Funds received for child support and other untaxed income (See question 44 on the FAFSA.)

Sources of Untaxed Income	2020 Amount	Sources of Untaxed Income	2020 Amount
a. Child support received	\$	e. Workman's Compensation	\$
b. Tax exempt (IRS form 1040 – Line 2a)	\$	f. Veterans non-education benefits	\$
c. Untaxed IRA distributions (IRS form 1040-line 4a minus 4b)	\$	g. Payments to pension (W-2 boxes 12a through 12d, codes D, E, F, G, H & S)	\$
d. Untaxed IRA pensions & annuities (IRS form 1040-line 5a minus 5b)	\$		



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Section H - Part 1: Identity and Statement of Educational Purpose

 Last Name First Name M.I. Last 4 Digits of SSN ID Number

If you are able to submit this form in person, you must complete **Section H - Part 1** in the presence of your Financial Aid Officer at your school.

The student must appear in person at University of the Virgin Islands to verify
 (*Name of Postsecondary Educational Institution*)

his or her identity by presenting a **valid, not expired, 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
 (*Print Student's Name*)

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 University of the Virgin Islands for 2022-2023.
 (*Name of Postsecondary Educational Institution*)

 (*Student's Signature*) _____ _____
 (*Student's ID Number*) (*Date*)

Office Use Only

Financial Aid Officer's Name

Financial Aid Officer's Signature

Date


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Section H - Part 2: Identity and Statement of Educational Purpose

_____ | _____ | _____ | _____
 Last Name First Name M.I. Last 4 Digits of SSN ID Number

If you are unable to submit this form in person, you must complete **Section H - Part 2** in the presence of a Notary Public and mail the notarized documents to your school's Financial Aid Office.

If the student is unable to appear in person at _____ **University of the Virgin Islands** _____ to

 (Name of Postsecondary Educational Institution)
 verify his or her identity, the student must provide:

- (a) A copy of a **valid, not expired, 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
- (b) The original notarized Statement of Educational Purpose provided below.

Statement of Educational Purpose

I certify that I _____ am the individual signing this

 (Print Student's Name)

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 _____ **University of the Virgin Islands** _____ for 2022-2023.

 (Name of Postsecondary Educational Institution)

 (Student's Signature)

 (Student's ID Number)

 (Date)

Notary's Certificate of Acknowledgement

State of _____, City/County of _____

On _____, before me, _____, personally appeared,

 (Date) (Notary's name)

_____, and provided to me on basis of satisfactory evidence of

 (Printed name of signer)

Identification _____ to be the above-named person

 (Type of government-issued photo ID provided)

who signed the foregoing statement.

WITNESS my hand and official seal

(seal)

 (Notary signature)

My commission expires on _____

 (Date)