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# University of the Virgin Islands - Office of Financial Aid 2020-2021 AGGREGATE Verification Worksheet

V5  
Independent

Your 2020-2021 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 **2018 Tax transcript(s), 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 340-692-4193, St. Croix or at 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, tax return transcript, 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 2018 Tax Return Transcript(s) and W-2 form(s)**  
**\* Non-tax filers must submit a 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, 2020 through June 30, 2021, or if the child would be required to provide your information if they were completing a FAFSA for 2020-2021. 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, 2020 through June 30, 2021.

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, 2020 and June 30, 2021. ***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)
<i>Marty Jones (example)</i>	28	<i>Spouse</i>	<i>Central University</i>	<i>Yes</i>
		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's Tax Return Transcript & Other Income Information**

**To request an official 2018 Tax Return Transcript or Verification of Non-filing Letter**

- 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.
  - For U.S Tax Filers**: To request an official 2018 Tax Return Transcript or Verification of Non-filing Letter from the Internal Revenue Service (IRS), you may call 1-800-908-9946 or complete the request Form 4506T online at www.irs.gov.
- Check here if you are attaching your **W-2 Form(s) and 2018 IRS Tax Return Transcript** – not photocopies of the income tax return.
- 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 2018.
- If you did not file and are not required to file a 2018 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 (Money received or paid on your behalf to include housing, food, living allowances)	IRS W-2 Attached Yes/No	2018 Income
		\$
		\$
		\$

- Funds received for child support and other untaxed income (See question 45 on the FAFSA.)

Sources of Untaxed Income	2018 Amount	Sources of Untaxed Income	2018 Amount
a. Child support received (Line 2a)	\$	e. Workman's Compensation	\$
b. Tax exempt (IRS form 1040)	\$	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. IRA deductions & payments (IRS form 1040-line 28+32)	\$		

**D. Spouse's Tax Return Transcript & Other Income Information**

**To request an official 2018 Tax Return Transcript or Verification of Non-filing Letter**

- 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.
  - For U.S Tax Filers**: To request an official 2018 Tax Return Transcript or Verification of Non-filing Letter from the Internal Revenue Service (IRS), you may call 1-800-908-9946 or complete the request Form 4506T online at www.irs.gov.
- Check here if you are attaching your and your spouse's **W-2 form(s) and joint tax 2018 IRS Tax Return Transcript** – not photocopies of the income tax return.
- Check here if you are attaching your spouse's **W-2 form(s) and 2018 IRS Tax Return Transcript** if your spouse filed a separate tax return – not photocopies of the income 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 2018.
- (a) If your spouse did not file and is not required to file a 2018 Federal income tax return, *list below your spouse's employer(s) and income received in 2018, 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 2018, list the source(s) of any income your household received in 2018.*

Employer's Name or Source of Income (Money received or paid on your behalf to include housing, food, living allowances)	IRS W-2 Attached Yes/No	2018 Income
		\$
		\$
		\$

- Funds received for child support and other untaxed income (See question 45 on the FAFSA.)

Sources of Untaxed Income	2018 Amount	Sources of Untaxed Income	2018 Amount
a. Child support received (Line 2a)	\$	e. Workman's Compensation	\$
b. Tax exempt (IRS form 1040)	\$	f. Veterans non-education benefits	\$
c. Untaxed IRA pensions (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. IRA deductions & payments (IRS form 1040-line 28+32)	\$		

### E. High School Completion Status

Provide one of the following documents that indicate the student's high school completion status when the student will begin college in 2020-2021:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A copy of the student's General Educational Development (GED) certificate or GED transcript.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit towards a bachelor's degree.
- 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.
- 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.

### F. Identity and Statement of Educational Purpose (See Enclosed Supplement Form) Student's Information

- 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.
- 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 completed form and notarized document to your school's Financial Aid Office.

### G. Certification & Signature

I certify that all the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

**Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

**Do not mail this worksheet to the U.S. Department of Education. Submit this worksheet to the University of the Virgin Islands financial aid office.**



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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 2020-2021.  
*(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*



## 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 2020-2021.  
*(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)*