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COLUMBIA COLLEGE

2023-2024 V5 Dependent Aggregate Worksheet

Your **2023–2024 Free Application for Federal Student Aid (FAFSA)** was selected for review in a process called **verification**. The law says that before awarding Federal Student Aid, **Columbia College Office of Student Financial Aid (CC OSFA)** may ask you to confirm the information **you and your parent(s)** reported on your FAFSA. To verify that you provided the correct information, CC OSFA will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. **You and one of your parents, whose information was submitted on the FAFSA, must complete and sign this worksheet, attach any required documents, and submit this form and the required documents to CC OSFA**. After a review of the information you submit, the CC OSFA may still ask for additional information. If you have questions about verification, contact the CC OSFA as soon as possible so that the processing of your financial aid will not be delayed.

A. Student's Information

Last Name	Middle Initial	First Name	**XXX-XX-** Social Security Number
Street Address (include apt. #)			Date Of Birth (MM/DD/YYYY)
City	State	Zip Code	Primary Phone
Email Address			

B. Student's Family Information

List the members of your **parent(s)' household** below. **If your parents (biological and/or adoptive) are not married to each other, separated or divorced and are living together, you must list both parents below and provide information about both of them, regardless of their gender**. Be sure to include:

- **Yourself** on the first line below.
- **Your parent(s)** (including a stepparent) even if you don't live with your parent(s).
- **Your parent(s)' other children** if your parent(s) will provide more than half of their 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 they do not live with your parent(s).
- 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**.

In the space below, please include the information about any household member, excluding your parent(s), who is, or will be, enrolled at least half-time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time **between July 1, 2023 and June 30, 2024** and include the name of the college. *If more space is needed, attach a separate sheet of paper.*

First and last name of family member	Age	Relationship to student	Name of college the person will attend *at least half-time* between 07/01/23 – 06/30/24:
		Self	Columbia College

Note: The CC OSFA may require additional documentation if there is reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Student Name: _____

C. Student's Income Information to Be Verified

- **TAX RETURN FILERS**

  __IMPORTANT:__ If you (or your spouse, if married) filed, or will file, an extension, an amended or foreign 2021 IRS tax return, please contact the CC OSFA before completing this section.

  *__INSTRUCTIONS:__ Complete this section if you (and spouse, if married), __filed or will file__ a **2021 income tax return with the IRS**. The best way to verify income is by using the IRS Data Retrieval Tool when applying for FAFSA. If you __have not__ already used the tool, you should go to fafsa.gov, log-in to your FAFSA record, select __"Make FAFSA Corrections,"__ navigate to the __Financial Information__ section of the form. From there, follow the instructions __to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into your FAFSA.__ **In most cases, for electronic IRS tax return filers, it takes __two to three weeks__ for IRS income information to be available for the IRS Data Retrieval Tool, and __six to eight weeks__ for paper IRS tax return filers.** If you need more information about how to use the IRS Data Retrieval Tool, contact 1-800-4FED-AID (or 1-800-433-3243).*

  Check the box that applies:

  ☐ I __have used__ the IRS Data Retrieval Tool in the FAFSA to transfer my **2021 IRS income information** into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.

  ☐ I __have not yet used__ the IRS Data Retrieval Tool in the FAFSA, but I __will use__ the tool to transfer my **2021 IRS income information** into my FAFSA once I have filed a **2021 IRS tax return**.

  > ☐ *See instructions above for the information on how to use the IRS Data Retrieval Tool. The CC OSFA cannot complete the verification process until the IRS information has been transferred into your FAFSA.*

  ☐ I am __unable or choose not to use__ the IRS Data Retrieval Tool in the FAFSA and I __will submit__ to the *CC OSFA* a **2021 IRS tax return transcript**— __not a photocopy of the income tax return__.

  > ☐ *To obtain a 2021 IRS tax return transcript, go to __www.irs.gov__, and under "Tools", click on the "Get a Tax Transcript" link; or call 1-800-908-9946. You may also download the Apple or Google IRS Apps online or submit a Paper Request IRS Form 4506T-EZ or 4506-T. __Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript."__ You will need your Social Security Number, date of birth, and the address on file with the IRS (__the address should be the one that__ you used when the 2021 IRS tax return was filed).*

  > ☐ *A 2021 IRS tax return transcript is attached to this worksheet.*

  > ☐ *A 2021 IRS tax return transcript will be summited to the CC OSFA later. The CC OSFA cannot complete the process of your financial aid until the IRS tax return transcript has been submitted to the CCOSFA.*

- **TAX RETURN __NONFILERS__**

  Complete this section if you __will not__ file and __is not required__ to file a **2021 income tax return** with the IRS.

  Check the box that applies:

  ☐ I __was not employed__ and had __no income__ earned from work in 2021.

  ☐ I was employed in 2011 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. **Attach the copies of all 2021 IRS W-2 forms issued to you)**. *__List every employer even if they did not issue an IRS W-2 form__. If more space is needed, attach a separate sheet of paper*.

Employer's name	Amount earned in 2021	IRS W-2 attached? Y/N
Total amount of income earned from work:	$	

Note: The CC OSFA may require you to provide the documentation, which indicates that 2021 IRS income tax return __was not filed__ with IRS.

Student Name: _____

D. Parent's Income Information to Be Verified

Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

- **TAX RETURN FILERS**

    *IMPORTANT: If your parent(s) filed, or will file, an extension, an amended or foreign 2021 IRS tax return, please contact to CC OSFA before completing this section.

    *INSTRUCTIONS: Complete this section if your parent(s) filed or will file a **2021 income tax return** with IRS. *The best way to verify income is by using the IRS Data Retrieval Tool when applying for FAFSA. If your parent(s) has not already used the tool, go to fafsa.gov, log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if your parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2021 IRS income tax information into your FAFSA. **In most cases, for electronic IRS tax return filers, it takes two to three weeks for IRS income information to be available for the IRS Data Retrieval Tool, and six to eight weeks for paper IRS tax return filers.** If you need more information about how to use the IRS Data Retrieval Tool, contact 1-800-4FED-AID (or 1-800-433-3243).*

    Check the box that applies:

    ☐ My parent(s) has used the IRS Data Retrieval Tool in the FAFSA to transfer **2021 IRS income information** into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.

    ☐ My parent(s) has not yet used the IRS Data Retrieval Tool in the FAFSA, but will use the tool to transfer **2021 IRS income information** into my FAFSA once the parent(s)' IRS tax return has been filed.

    　　☐ *See the instructions above for the information on how to use the IRS Data Retrieval Tool. The CC OSFA cannot complete the verification process until the IRS information has been transferred into your FAFSA.*

    ☐ My parent(s) is unable or chooses not to use the IRS Data Retrieval Tool in the FAFSA and I will submit to the *CC OSFA* a copy of my parent(s)' **2021 IRS tax return transcript(s)**—not a photocopy of the income tax return.

    　　☐ *To obtain a 2019 IRS tax return transcript, go to www .irs.gov, and under "Tools", click on the "Get a Tax Transcript" link; or call 1-800-908-9946. You may also download the Apple or Google IRS Apps online or submit a Paper Request IRS Form 4506T-EZ or 4506-T. Make sure to request the "**IRS tax return transcript**" a nd not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (the address should be the one that is used when the 2021 IRS tax return was filed). If separate tax returns were field, a 2021 IRS tax return transcript must be submitted for each parent listed on this worksheet.*

    　　☐ *A 2021 IRS tax return transcript(s) is attached to this worksheet.*

    　　☐ *A 2021 IRS tax return transcript(s) will be summited to the CC OSFA later. The CC OSFA cannot complete the process of your financial aid until the IRS tax return transcript has been submitted to the CCOSFA.*

- **TAX RETURN NONFILERS**

    Complete this section if your parent(s) will not file and is not required to file a **2021 income tax return** with the IRS.

    Check the box that applies:

    ☐ My parent(s) was not employed and had no income earned from work in 2021.

    ☐ My parent(s) was employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is attached. **Attach the copies of all 2021 IRS W-2 forms issued to your parent(s)**. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate sheet of paper*.

Employer's name	Amount earned in 2020	IRS W-2 attached? Y/N
Total amount of income earned from work:	$	

Note: The CCOSFA may require you to provide the documentation from the IRS that indicates your 2021 IRS income tax return was not filed with IRS.

Student Name: _____

E. Parent's Other Information to Be Verified

1. Complete this section if the member(s) in your parent(s) household (listed in Section B) received benefits from the **Supplemental Nutrition Assistance Program (SNAP)** or **food stamps** any time <u>during the 2021 - 2022 calendar years</u>.

    *SNAP may be known by another name in some states. For assistance in determining the name used in a state, please call

    1-800-4FED-AID (or 1-800-433-3243).

    Indicate the total amount of SNAP benefits received in **2021** and/or **2022** for any member of your parent(s) household:

    $ _____ $ _____
              2021   2022

    Note: If the CC OSFA has reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, additional documentation will need to be requested from the agency that issued the SNAP benefits in **2021** and/or **2022.**

2. Complete this section if <u>at least</u> one of your parent(s) <u>paid</u> **child support** in **2021**.

    [ ] One (or both) of your parent(s) listed in Section B paid **child support** in **2021**. Your parent(s) has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the name(s) and age (s) of the children for whom child support was paid, and the total annual amount of child support that was paid in 2021 for each child. If asked by the CC OSFA, you may need to provide additional documentation of the payment of child support. *If you need more space, attach a separate sheet of paper.*

Name of person who paid child support	Name of person to whom child support was paid	Name of child for whom support was paid	Age of child	Amount of child support paid in 2021
Ex. Joe Jones	*Jane Doe*	*Jake Jones*	*15*	*$6,000*

Note: The CC OSFA may require additional documentation if there is reason to believe that the information regarding child support paid is inaccurate.

F. High School Completion Status

You must provide <u>one</u> of the following documents to the CC OSFA in order to verify your high school completion.

[ ] **A copy of high school diploma or final official high school transcript** that shows the date when the diploma was awarded.

[ ] **A state certificate or transcript** received by the student after the student passed a **State-authorized examination** (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma.

[ ] **Academic transcript** that indicates the student successfully completed <u>at least</u> a **two-year program** that is acceptable for full credit toward a **bachelor's degree**.

[ ] **A copy of the "secondary school leaving certificate" or other similar document**, for students who completed the secondary education in a foreign country.

[ ] 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 <u>does not require</u> a homeschooled student to obtain secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), **a transcript or the equivalent**, <u>signed by the student's parent or guardian</u>, 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.

Student Name: _____

G. Documentation of Identity/Statement of Educational Purpose

*****DO NOT COMPLETE THIS SECTION UNTIL YOU ARE EITHER **IN PERSON** AT THE CC OSFA OR IN **THE PRESENCE OF A NOTARY*******

In order to complete the Verification process, you will need to appear **in person** at the CC OSFA and present an unexpired valid government-issued photo ID (such as a driver's license, military ID, passport, etc.) and this verification worksheet to the Office. The CC OSFA will need to validate the statement below at the time of submission by maintaining a copy of your photo ID and by providing a signature and date. *If you cannot appear in person to submit this worksheet, you will need to provide a copy of your government- issued photo ID and this worksheet notarized by a public notary to the CC OSFA*.

Statement of Educational Purpose

I certify that I, _____ , am the individual signing this Statement of Educational Purpose and that the Federal
_____(Student's Name)
student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Columbia College

for 2022-2023.

_____   _____
Student's Signature   Date

_____   _____
Financial Aid Staff's Signature   Date
OR

_____   _____
Notary's Signature   Date

****

If the student is unable to appear in person, have a notary to complete the Notary's Certificate of Acknowledgement below.

****

H. Notary's Certificate of Acknowledgement:

State of _____

County of _____

On _____ , before me, _____ , personally appeared
_____(Date)   (Title of the officer)

_____ , who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s)
_____(Name of the officer)

is/are subscribed to the within instrument and acknowledged to me that he/she they executed the same in his/her/their authorized

capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s)

acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of _____ that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature of Notary Public _____   (Seal)

Student Name: _____

I. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on this form is complete and correct.
If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.
The student and one parent whose information was reported on the FAFSA must sign and date below.

_____	_____
Student's Signature	Date
_____	_____
Parent's Signature	Date

Submit this worksheet to the CC OSFA.

You should make a copy of this worksheet for your records.