



COLUMBIA COLLEGE

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Form 040-014
Rev. 05/2024

2024-2025 V5 Independent Aggregate Worksheet

Your 2024 -2025 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 spouse, if you married) 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 your spouse, if you married) 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

Form fields for Student's Information including Last Name, Middle Initial, First Name, Social Security Number, Street Address, Date Of Birth, City, State, ZipCode, Primary Phone, and Email Address.

B. Student's Family Information

List the members of your household below. Be sure to include:

- Yourself on the first line below.
• Your spouse, if you are married. (In accordance with the Defense of Marriage Act (DOMA), same sex couples must report their marital status as married if they were legally married in a state or other jurisdiction (foreign country) that permits same-sex marriage, without regard to where the couple resides).
• Your children (if any) and your spouse's children, if you and/or your spouse will provide more than half of their support from July 1, 2024 through June 30, 2025, even if the children do not live with you.
• Other people if they now live with you and you and/or your spouse provide more than half of their support and will continue to provide more than half of their support through June 30, 2025.

In the space below, please include the information about any household member 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, 2024 and June 30, 2025 and include the name of the college. If more space is needed, attach a separate sheet of paper.

Table with 4 columns: First and last name of family member, Age, Relationship to student, Name of college the person will attend at least half-time between 07/01/24 -06/30/25. Includes one row for 'Self' at 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 2022 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 **2022 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 2022 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 (and my spouse's, if married) **2022 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 (and, if married, my spouse's) **2022 IRS income information** into my FAFSA once I have filed a **2022 IRS tax return**.
- 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.
- 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 **2022 IRS tax return transcript**—not a photocopy of the income tax return.
- To obtain a 2022 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 2022 IRS tax return was filed). **If you are married, and you and your spouse filed 2022 tax returns separately, a 2022 tax return transcript must be submitted for both you and your spouse.**
- A 2022 IRS tax return transcript is attached to this worksheet.
- A 2022 IRS tax return transcript will be submitted 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 (and your spouse, if married), will not file and is not required to file a **2022 income tax return** with the IRS.

Check the box that applies:

- I (and my spouse, if married) was not employed and had no income earned from work in **2022**.
- I (and/or my spouse, if married) was employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form is attached. **Attach the copies of all 2022 IRS W-2 forms issued to you (and to your spouse, if married)**. 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.

Employee's name (e.g. You and/or your spouse)	Employer's name	Amount earned in 2022	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 2022 IRS income tax return was not filed with IRS.

Student Name: _____

D. High School Completion Status

You must provide one 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 at least 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 does not require 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, 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.

E. 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 2024-2025.

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.

Student Name: _____

F. 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 of the officer)

name(s) 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)

G. 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 his or her spouse, if married) must sign and date below.

Student's Signature

Date

Spouse's Signature

Date

Submit this worksheet to the CC OSFA.

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