

**AGGREGATE VERIFICATION WORKSHEET V5**
**2023 - 2024**

Due to the information provided in your 2023-2024 Free Application for Federal Student Aid (FAFSA), your form was selected for review in a process called *Verification*. The FAFSA will be compared to the information on this worksheet, along with any other required documents. If there are inconsistencies, the FAFSA may need to be corrected. If you are a dependent student, your parents must complete and sign this worksheet (with all other requested documents) before submitting it to the College's Office of Student Financial Services.

**This process takes 14 business days from the time that all requested documents are received (i.e., this does not include any time for necessary corrections).** Please be advised that it may take longer during times of peak activity at the College (i.e., the beginning of the fall and spring). **For this reason, it is essential to check the College's Calendar for the Financial Aid Guaranteed Processing Deadline during the term of enrollment.** Forms are located online at: [polk.edu](http://polk.edu) (click on Admission & Aid, then Financial Aid, and then Forms (left tabs)). Questions about verification should be directed to the Student Financial Services Office as soon as possible to prevent delays in receipt of financial aid.

Student Name (Please Print): \_\_\_\_\_ Student ID: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_ Term: \_\_\_\_\_

**A. Dependency Status and Family Information: (Please read, select the applicable choice, and fill in the table.)**

\_\_\_\_\_ **Dependent:** A dependent student is required to provide parental data on the FAFSA. This includes students who do not live with their parents, and do not fall in the following categories: married, financially supporting a child at 51% (from July 1, 2023 through June 30, 2024), those serving in the military, veterans, or qualified unaccompanied youths. Please include the following information on the table below. **(Please do not abbreviate.)**

- Parents/stepparent *who provide more than half of your financial support.*
- Your parents' or stepparent's dependent children if your parents/stepparent will provide more than half of their support, or if the children would be required to provide parent information when applying for financial aid.
- List other people only if they live with your parent(s), **and** if your parent(s) will provide more than half of the support, **and** they will continue to provide it from July 1, 2023, through June 30, 2024.
- Include the name of the **college** attended by each household member who will be attending **at least as a half-time student** between July 1, 2023, through June 30, 2024.

\_\_\_\_\_ **Independent:** A student is considered independent if he or she is married, has a child that he or she must take care of 51% of the year, serves in the military, is a veteran, or is a qualified unaccompanied youth. Please include the following information on the table: **(Please do not use abbreviations.)**

- You and your spouse (if married).
- Your dependent children if you provide more than half of their support.
- Other people that are part of the household, only if they now live with you, **and** you provide more than half of their support, **and** you will continue to provide more than half their support from July 1, 2023, through June 30, 2024.
- The name of the college of each household member who will be attending **at least as a half-time student** from July 1, 2023, through June 30, 2024.

<u>First, Last Name:</u> Student (YOU):	<u>Age:</u>	<u>Relationship:</u> Self	<u>Full College Name:</u> Polk State College
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**B. Tax Return/Income Verification: (Please check the line that applies.)**

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of the FAFSA and is available at [www.studentaid.gov](http://www.studentaid.gov). If the IRS Data Retrieval Tool was not used in the application, the student should log into the FAFSA, click on "Make FAFSA Corrections," on the *Financial Information* section. This section provides instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2021 income tax information into the FAFSA. **Please be advised that individuals who used the "Married, Filing Separately" option to file taxes cannot use this tool.**

**Student/Spouse (if married):**

- I have used the IRS Data Retrieval Tool to transfer my 2021 Income Tax Return information. (Go to Section D.)
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the 2021 Tax Transcript ([www.irs.gov](http://www.irs.gov)) or a signed 2021 Tax Return. (Go to Section D.)
- I certify that I did not, will not, and am not required to file a 2021 Income Tax Return. (Go to Section C.)
- I amended the 2021 Tax Return. **Attach** a signed copy of the **1040X Form and Tax Transcripts.** (Go to Section D.)
- I have filed for an extension of the 2021 tax year and have attached a copy of IRS Form 4868, the approval of the extension, a signed IRS 1040 Form, W-2 Forms, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2021.
- I am a victim of identity theft and **have attached** the 2021 Tax Return Database View Transcript (TRDBV) from the IRS or any other IRS tax transcripts that include all the income and tax information that require verification within the process, as well as a signed and dated statement from the tax filer.  
(To obtain documents or assistance, contact the IRS at 1.800.908.4490.)

**Parent(s)/Stepparent:**

- I/We have used the IRS Data Retrieval Tool to transfer 2021 Income Tax Return information. (Go to Section D.)
- I **did not** use the IRS Data Retrieval Tool. **Attach** a copy of the 2021 Tax Transcript ([www.irs.gov](http://www.irs.gov)) or a signed 2021 Tax Return. The signature belongs on the second page of the Tax Return Form. (Go to Section D.)
- I/We certify that I/We did not, will not, and am/are not required to file a 2021 U.S. Income Tax Return. (Go to Section C.)
- I/We amended the 2021 Tax Return. **Attach** a signed copy of the **2021 1040X Form and tax transcripts.**  
(Go to Section D.)
- I/We have filed an extension for the 2021 tax year and have attached a copy of IRS Form 4868, the approval of the extension, a signed IRS 1040 Form, W-2 Forms, and a signed statement (if self-employed) certifying the Adjusted Gross Income (AGI) and the U.S. income tax paid for 2021.
- I am/We are victim(s) of identity theft and **have attached** the 2021 Tax Return Database View Transcript (TRDBV) from their or any other IRS tax transcripts that include the income and tax information that require verification within the process, as well as a signed and dated statement from the tax filer. (To obtain documents or assistance, contact the IRS at 1.800.908.4490.)

**C. Non-Tax Filers Income Information: (Please read below and fill in the box.)**

- If you earned an income in 2021 and were not required to file a 2021 Income Tax Return, **list your employer(s)** below and **any other income received.** (Note: In most situations, a minimum total income of \$12,550 requires that a Tax Return to be filed.)
- Attach all earning statements such as 2021 W-2 Forms and/or 1099 Forms. If you do not have a 1099 Form and worked for yourself, please provide a signed statement that includes the source of income, total taxes paid, and the Adjusted Gross Income (AGI).
- If you do not have a 1099 Form and did not work, please provide a signed statement that includes your source of income, total tax paid, and the Adjusted Gross Income (AGI).

**If for any reason the information you provide is questionable based on professional judgment, the College may require additional documentation. Please do not leave this section blank. If an area is not applicable, enter "N/A."**

Employer Name/Source of Income (Please check.)	2021 W-2 and/or 1099 Forms Attached?	Student 2021 Annual Amount	Parent(s)/Stepparent Annual Amount
1. _____	___ Yes ___ No	_____	_____
2. _____	___ Yes ___ No	_____	_____
3. _____	___ Yes ___ No	_____	_____
4. _____	___ Yes ___ No	_____	_____

**D. Untaxed and Investment Income: (Do not leave this section blank.)**

Even if the student and parent(s)/stepparent have situations that pertain to the above sections, all individual(s) must complete this section in its entirety and attach all relevant 2021 *W-2 Forms* and/or *1099 Forms*. If an individual does not have a *1099 Form* and has not worked, please provide a signed statement that includes the source of your income, total tax paid, and the Adjusted Gross Income (AGI).

**Sources of Untaxed Income**
**Student (2021 Amount)**
**Parent(s)/Stepparent (2021 Amount)**

Do you have an IRA Distribution from your IRS Form, 1040, or 1040A rollover amount?

YES:\_\_\_ NO:\_\_\_

YES:\_\_\_ NO:\_\_\_

Do you have a pension distribution from your IRS form, 1040, or 1040A rollover amount?

YES:\_\_\_ NO:\_\_\_

YES:\_\_\_ NO:\_\_\_

Do you have other 2021 untaxed income or benefits not mentioned on this form? List this income in Section C of this form.

YES:\_\_\_ NO:\_\_\_

YES:\_\_\_ NO:\_\_\_

**E. High School Completion Status:** Students must provide one of the following documents to the Polk State College Admissions Office. Please check the box that indicates the high school completion status. *\*Please select **only** one box.*

*This pertains to the student **only**.*

**\_\_\_ High School Diploma**

A copy of the high school diploma or copy of the final high school transcript that includes the date of completion.

**\_\_\_ State Certificate**

A copy of the certificate that the student received after passing a state-authorized examination that is recognized as the equivalent of a diploma.

**\_\_\_ Completion of Secondary Education in a Foreign Country**

Provide documentation via a "secondary school leaving certificate" (or another similar document) that shows completion of secondary education.

**\_\_\_ GED Completion**

A copy of the GED Certificate or an official copy of the GED Transcript.

**\_\_\_ Associate Program Completion**

Evidence of an official transcript showing that the student completed at least a two-year degree that is acceptable for full credit toward a baccalaureate degree.

**\_\_\_ Home Schooled Students**

A transcript (or the equivalent) signed by the student's parent or guardian and lists the secondary courses that the student completed. Please also submit a statement that the student successfully completed a secondary school education in a home-school setting.

\_\_\_\_\_  
 Student Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent Signature (if dependent) or Spouse

\_\_\_\_\_  
 Date

**Validity of Identification and Statement of Educational Purpose:** Please mail a copy of an unexpired valid government-issued photo identification. Acceptable identification cards include, but are not limited to a driver's license, state-issued identification, or passport. Print the Statement of Educational Purpose (below), and have it notarized.

**Note: Only the original notarized Statement of Educational Purpose will be accepted.**

**Student Information**

Student Name:	Student ID:
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**Identity and Statement of Educational Purpose** (to be signed with notary)

I, \_\_\_\_\_, (the student) certify that I am the individual signing this **Statement of Educational Purpose** and that the federal financial aid assistance I may receive will only be used for educational purposes to pay for the cost of attending Polk State College for **2023-2024** Academic Year.

\_\_\_\_\_  
Student Signature                      Date

\_\_\_\_\_  
Notary Stamp                      Date

\_\_\_\_\_  
Signature of Notary

**Mail this original notarized form to:**

Polk State College  
Office of Student Financial Services  
999 Avenue H, N.E.  
Winter Haven, FL 33881-4299