

# Dependent Student Verification Form

## PART I: To Be Completed by the Student

Student Name (Last, First, MI): \_\_\_\_\_ UMass Spire ID: \_\_\_\_\_

### Did you file a 2021 Federal Income Tax Return?

YES  **I filed a 2021 Federal Income Tax return. Do one of the following:**

1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2021 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
  - A 2021 Record of Account Transcript obtained from the IRS. Or
  - A Signed copy of 2021 Federal income Tax Return (Form 1040) including all schedules filed.

NO  **I did not and was not required to file a 2021 Federal Income Tax Return.**

**Check one and complete information below:**

- I did not work and had no income earned from work in 2021
- I was employed and earned income from work in 2021. I am listing below the names of employer(s), amount(s) earned from each employer, and indicating if a W-2 or equivalent form was received.

Name of Employer:	Amount Earned:	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	\$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	\$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	\$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No

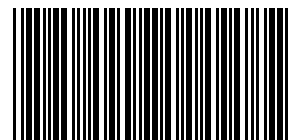
**Submit copies of all 2021 W-2 forms.**

**NOTICE:** Any financial aid awarded prior to verification is tentative. Financial Aid Services has the right, after reviewing your verification information, to change or cancel your award. Changes in funding, administrative/technical errors, changes in application information, enrollment status or reclassification in residency will affect your financial aid award and may result in a revised financial aid award.

### How to obtain 2021 a Record of Account Transcripts or Verification of Nonfiling from the IRS:

Transcript are generally received within 10 business days from the IRS's receipt of the request.

- **Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record.” Click “Get transcript by Mail.” Request the “Record of Account Transcript”.
- **Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click “Get Your Tax Record.” Click “Get Transcript Online.” Follow instructions to set up an account. **And** Request the “Record of Account Transcript”.
- **Automated Telephone Request** – Call 1-800-908-9946.
- **Paper Request Form** – Complete IRS Form 4506-T. This form is also available for download at [umass.edu/financialaid](http://umass.edu/financialaid)



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UMass Spire ID: \_\_\_\_\_

## PART II: To Be Completed by the Parent:

Name of Parent completing this Section: \_\_\_\_\_ Email Address: \_\_\_\_\_

### Parent(s) Household Information:

Provide information for family members living in your household. Include: the student, even if they don't live with you. The parent(s), and/or step-parent. Unmarried parents living together and same-sex parents who were legally married in any jurisdiction. Include other children and people **only if you will provide more than half of their support between July 1, 2023 and June 30, 2024.**

Full Name of Household Member	Age	Relationship	Parent check Yes or No If you pay <b>more than half of financial support</b> for the people listed.	Name of college attending for 2023-2024. Must be enrolled at least half time
1.		Student	N/A	UMASS Amherst
2.		Parent 1		Not applicable
3.		Parent 2/Stepparent		Not applicable
4.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
5.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
6.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
7.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
8.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
9.			<input type="checkbox"/> Yes <input type="checkbox"/> No	
10.			<input type="checkbox"/> Yes <input type="checkbox"/> No	

## PART III: Parent Income Information: This section apply to each parent included in household above.

### Did you file a 2021 Federal Income Tax Return?

**YES**  **Parents filed a 2021 Federal Income Tax return. Do one of the following:**

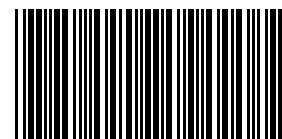
1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2021 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
  - A 2021 a Record of Account Transcript obtained from the IRS. Or
  - A Signed copy of parent's 2021 Federal Income Tax Return (IRS Form 1040) including all schedules filed.

**NO**  **Parents did not file and were not required to file a 2021 Federal Income Tax Return.**

**Non-filing Parents are required to Submit a:**

- **2021 Verification of Nonfiling obtained from the IRS, for each parent included in household.**

*NOTE: If you have attempted and have been unable to obtain a Verification of Nonfiling from the IRS, contact Financial Aid Services.*



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Student Name: \_\_\_\_\_

UMass Spire ID: \_\_\_\_\_

## PART III: Parents that Did not File a 2021 Tax Return Must Complete this Section:

### Check one and complete below:

- Parents did not work and had no income earned from work in 2021
- Parents was/were employed and earned income from work in 2021. Below are the names of employers, amounts earned from each employer, and indicating if a W-2 or equivalent form was received.

Name of Employer:	Amount Earned:	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	\$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	\$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	\$ _____	W-2? <input type="checkbox"/> Yes <input type="checkbox"/> No

**Submit copies of all 2021 W-2 forms.**

## List Other Income Received in 2021:

Alimony or spousal support received in 2021 and <u>not</u> reported on tax return:	\$ _____
Child Support received for any of your children in 2021:	\$ _____
Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers.	\$ _____
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions toward employee health benefits).	\$ _____
Military, clergy, or other housing, food, or living allowance payment received (including cash payments and cash value of benefits):	\$ _____
Amount of veterans non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances:	\$ _____
Other untaxed income- list sources of income (e.g. workers' compensation, disability, etc.):	\$ _____
Source: _____	\$ _____
Source: _____	\$ _____

## PART IV: Certification and Signatures

We certify that all information submitted with, and written on this application, is complete, accurate, and corrections may be made based on data provided, and that if I purposely give false or misleading information on this worksheet, I may be fined, sentenced to prison, or both. I also certify that any federal or state financial aid funds I may receive will only be used to pay for educational expenses related to my attendance at the University of Massachusetts Amherst for the 2023-2024 academic year.

Parent Signature: \_\_\_\_\_ Date \_\_\_\_\_

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

Fax completed form to: **413-545-1700** or  
 Secure Document Upload at: [umass.edu/financialaid/upload](https://umass.edu/financialaid/upload)

