

# 2021-2022 Dependent Student Verification Form

## PART I: To Be Completed by the Student

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

### Did you file a 2019 Federal Income Tax Return?

#### YES I filed a 2019 Federal Income Tax return. Do one of the following:

1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2019 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
  - A 2019 Tax Return Transcript obtained from the IRS. Or
  - A Signed copy of 2019 Federal income tax return (1040) including all schedules filed.

NO  I did not file a 2019 Federal Income Tax Return and was not required to file a 2019 Federal tax return.

#### Check one and complete below:

I did not work and had no income earned from work in 2019  
 I was employed and earned income from work in 2019. 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 issued.

Name of Employer:

Amount Earned:

\$ \_\_\_\_\_ W-2?  Yes  No

\$ \_\_\_\_\_ W-2?  Yes  No

\$ \_\_\_\_\_ W-2?  Yes  No

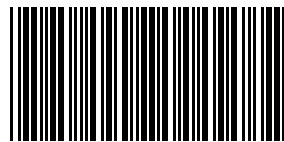
**Submit copies of all 2019 W-2 forms.**

**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 2019 Tax return transcripts or Verification of Non-filing from the IRS:

Transcripts 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 "Return Transcript."**
- **Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov)**, click "Get Your Tax Record." Click "Get Transcript Online." **Request the "Return Transcript"** and follow instructions to set up an account.
- **Automated Telephone Request – Call 1-800-908-9946.**
- **Paper Request Form – Complete IRS Form 4506T-EZ or IRS Form 4506-T.** This form is also available at [umass.edu/umfa/forms](http://umass.edu/umfa/forms).



# 2021-2022 Dependent Student Verification Form

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

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. Include unmarried parents living together and same-sex parents who were legally married in any jurisdiction.
- Other dependent children if you will provide **more than half of their support** between July 1, 2021 and June 30, 2022.
- Other people, only if now live with you and you provide and will continue to provide **more than half of their support** through June 30, 2022

| 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 2021-2022.<br>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 applies to each parent included in household above.

### Did you file a 2019 Federal Income Tax Return?

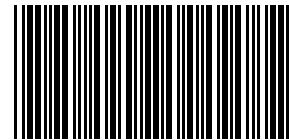
**YES  Parents filed a 2019 Federal Income Tax return. Do one of the following:**

1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2019 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
  - **A 2019 Tax Return Transcript obtained from the IRS. Or**
  - **A Signed copy of parent's 2019 Federal income tax return (1040) including all schedules filed.**

**NOTE: Parent(s) that did not file a 2019 Federal Income Tax Return are required to submit:**

- A 2019 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.



# 2021-2022 Dependent Student Verification Form

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

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

## PART III: Parent Income Information (continue):

### Did you file a 2019 Federal Income Tax Return?

**NO**  Parent(s) did not file a 2019 Federal Income Tax Return and were not required to file a 2019 Federal Income Tax Return. **Submit a 2019 Verification of Nonfiling obtained from the IRS.**

### Check one and complete below:

- Parent(s) did not work and had no income earned from work in 2019
- Parent(s) was/were employed and earned income from work in 2019. Below are the names of employer(s), amount(s) earned from each employer, and indicating if a W-2 or equivalent form was issued.

|   |                |
|---|----------------|
| 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 |                |
| Submit copies of all 2019 W-2 forms.                          |                |

### List Other Income Received in 2019:

|  |          |
|--|----------|
| Alimony or spousal support received in 2019 and <u>not</u> reported on tax return:   | \$ _____ |
| Child Support received in 2019:  | \$ _____ |
| 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.):<br>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 2021-2022 academic year.

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

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

Fax completed signed form to: 413-545-1700  
or secure upload form at: [umass.edu/financialaid/upload](http://umass.edu/financialaid/upload)  
(Attachments must be a standard image file, or in one of the following file formats: .doc, .docx, .pdf)

