

Dependent Student Verification Form

PART I: To Be Completed by the Student

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

Did you file a 2020 Federal Income Tax Return?

YES ☐ I filed a 2020 Federal Income Tax return. Do one of the following:

1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2020 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
 - A 2020 Record of Account Transcript obtained from the IRS. Or
 - A Signed copy of 2020 Federal income Tax Return (Form 1040) including all schedules filed.

NO ☐ I did not and was not required to file a 2020 Federal Income Tax Return.

Check one and complete information below:

- ☐ I did not work and had no income earned from work in 2020
- ☐ I was employed and earned income from work in 2020. 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

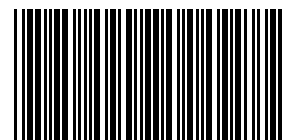
Submit copies of all 2020 W-2 forms.

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 2020 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, click “Get Your Tax Record.” Click “Get transcript by Mail.” Request the “Record of Account Transcript”.
- **Get Transcript Online** – Go to 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



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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. 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, 2022 and June 30, 2023.**

Full Name of Household Member	Age	Relationship	Parent check Yes or No If you pay more than half of financial support for the people listed.	Name of college attending for 2022-2023. 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 2020 Federal Income Tax Return?

YES ☐ Parents filed a 2020 Federal Income Tax return. Do one of the following:

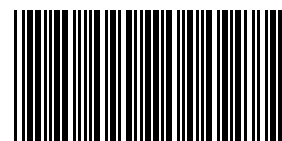
1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2020 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
 - A 2020 a Record of Account Transcript obtained from the IRS. Or
 - A Signed copy of parent's 2020 Federal Income Tax Return (IRS Form 1040) including all schedules filed.

NO ☐ Parents did not file and were not required to file a 2020 Federal Income Tax Return.

Non-filing Parents are required to Submit a:

- 2020 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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UMass Spire ID: _____

PART III: Parents that Did not File a 2020 Tax Return Must Complete this Section:

Check one and complete below:

- ☐ Parents did not work and had no income earned from work in 2020
- ☐ Parents was/were employed and earned income from work in 2020. 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

Submit copies of all 2020 W-2 forms.

List Other Income Received in 2020:

Unemployment Compensation received in 2020:	\$ _____
Alimony or spousal support received in 2020 and <u>not</u> reported on tax return:	\$ _____
Child Support received for any of your children in 2020:	\$ _____
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 2022-2023 academic year.

Parent Signature: _____ Date: _____

Student Signature: _____ Date: _____

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

