Financial Aid Services
Academic Year 2023-2024
Fax: 413-545-1700
Phone: 413-545-0801

University *of*
Massachusetts
Amherst **BE REVOLUTIONARY**

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 <u>filed</u> a 2021 Federal Income Tax return. <u>Do one of the following:</u>

    1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2021 income information. Or

    2. Submit <u>ONE</u> 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 <u>did not and was not required </u>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.

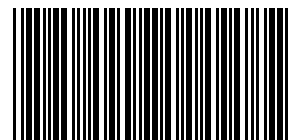| Name of Employer:	Amount Earned:	
_____	$_____	W-2? ☐Yes ☐No
_____	$_____	W-2? ☐Yes ☐No
_____	$_____	W-2? ☐Yes ☐No
	Submit copies of all 2021 W-2 forms.	

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**, 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, 2023 and June 30, 2024.

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 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.			☐ Yes ☐ No	
5.			☐ Yes ☐ No	
6.			☐ Yes ☐ No	
7.			☐ Yes ☐ No	
8.			☐ Yes ☐ No	
9.			☐ Yes ☐ No	
10			☐ Yes ☐ 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 <u>filed</u> a 2021 Federal Income Tax return. <u>Do one of the following:</u>
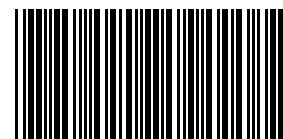
1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2021 income information. Or

2. Submit <u>ONE</u> 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 <u>did not file and were not required to file</u> 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? ☐Yes ☐No
_____	$_____	W-2? ☐Yes ☐No
_____	$_____	W-2? ☐ Yes ☐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

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