



# Dependent Student Verification Form

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

UMass SPIRE ID: \_\_\_\_\_

## PART I: To Be Completed by the Student

### Did you file a 2022 Federal Income Tax Return?

YES- *I filed a 2022 Federal Income Tax return.*

Submit ONE of the following documents to Financial Aid Services:

- **A 2022 Tax Return Transcript obtained from the IRS.** Or
- **A Signed copy of 2022 Federal income Tax Return (Form 1040) including all schedules filed.**

NO- *I did not and was not required to file a 2022 Federal Income Tax Return.*

Check one and complete information below:

- I did not work and had no income earned from work in 2022
- I was employed and earned income from work in 2022. 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
<b>Submit copies of all 2022 W-2 forms.</b>		

**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 2022 Tax Return Transcripts 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 “Return 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 “Return 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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## PART II: To Be Completed by the Parent:

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

### Parent(s) Family 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, 2024 and June 30, 2025.**

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 2024-2025. 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 the Parent file a 2022 Federal Income Tax Return?

YES- Parents filed a 2022 Federal Income Tax return.

Submit ONE of the following documents to Financial Aid Services:

- A 2022 Tax Return Transcript obtained from the IRS.
- A Signed copy of parent's 2022 Federal Income Tax Return (IRS Form 1040) including all schedules filed.

NO- Parents did not file and were not required to file a 2022 Federal Income Tax Return. Complete the next section.





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## PART III: Parents that Did not File a 2022 Tax Return Must Complete this Section:

### Check one and complete below:

- Parents did not work and had no income earned from work in 2022
- Parents was/were employed and earned income from work in 2022. 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 2022 W-2 forms.**

## List Other Income Received in 2022:

Amount of Child Support received for any of your children:	\$ _____
Other untaxed income- list sources of income (e.g. workers' compensation, disability, etc.):	
Source: _____	\$ _____
Source: _____	\$ _____

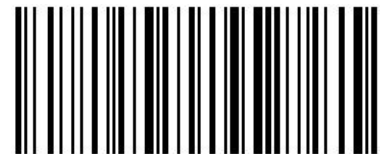
## PART IV: Certification and Signatures

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 2024-2025 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)



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