

2020-2021 Dependent Verification Form

PART I: TO BE COMPLETE BY THE STUDENT

Student Name: _____ Spire ID: _____

Did you file a 2018 Federal Income Tax Return?	<input type="checkbox"/> Yes	<input type="checkbox"/> No , I did not file and <u>was not required</u> to file a 2018 income tax return.
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If you filed a 2018 Federal Income Tax return do one the following:

1. Use the IRS Data Retrieval Tool (DRT) to update your FAFSA with 2018 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
 - **A 2018 Tax Return Transcript obtained from the IRS. Or**
 - **A Signed copy of 2018 income tax return (1040) including all schedules filed**

If you did not file a 2018 Federal Income Tax Return check one and complete below:

- I did not work and had no income earned from work in 2018
- I was employed and earned income from work in 2018. 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 issue.

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

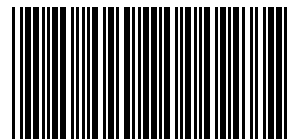
Submit copies of all 2018 W-2 forms.

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 2018 Tax return transcripts or 2018 Verification of Nonfiling from the IRS:

Transcript or Verification of Nonfiling 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 "Return Transcript"**.
- **Get Transcript Online** – Go to 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.



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Student Name: _____

Spire ID: _____

PART II: TO BE COMPLETE BY THE PARENT:

Name of Parent completing this Section: _____ Email Address: _____

PARENT(S) HOUSEHOLD INFORMATION:

Provide information for family members 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, 2020 and June 30, 2021.
- 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, 2021

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 2020-2021. 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	

PARENT INCOME INFORMATION: This section apply to each parent included in household above.

<p>Did the parent(s) file a 2018 Federal Income Tax Return? *Non tax filers are required to submit a Verification of Nonfiling obtained from the IRS.</p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No , parent(s) did not file and <u>were not required</u> to file a 2018 Federal income tax return.*
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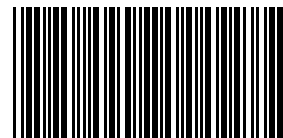
IF THE PARENT(S) FILED A 2018 FEDERAL INCOME TAX RETURN DO ONE OF THE FOLLOWING:

1. Use the IRS Data Retrieval Tool (DRT) to update the FAFSA with parent's 2018 income information. Or
2. Submit ONE of the following documents to Financial Aid Services:
 - A 2018 Tax Return Transcript obtained from the IRS. Or
 - A Signed copy of parent's 2018 income tax return (1040) including all schedules filed

IF PARENT(S) DID NOT FILE A 2018 FEDERAL INCOME TAX RETURN SUBMIT:

- A 2018 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: _____

Spire ID: _____

PARENT INCOME INFORMATION (continue):

IF PARENT(S) DID NOT FILE A 2018 FEDERAL INCOME TAX RETURN CHECK ONE AND COMPLETE BELOW:

- Parent(s) did not work and had no income earned from work in 2018
- Parent(s) was/were employed and earned income from work in 2018. 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 issue.

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 2018 W-2 forms.

LIST OTHER INCOME RECEIVED IN 2018:

Alimony or spousal support received in 2018 and <u>not</u> reported on tax return:	\$ _____
Child Support received in 2018:	\$ _____
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 III: 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 2020-2021.

Parent Signature: _____ Date: _____

Student Signature: _____ Date: _____

Fax completed signed form to: 413-545-1700
or email to: fadocs@umass.edu

(Attachments must be a standard image file, or in one of the following file formats: .doc, .docx, .pdf)

