

# Aggregate Verification Worksheet (V5) 2023 - 2024



Your 2023-2024 FAFSA was selected for a review process known as verification. This means that you are now required to complete and return this Worksheet to the Hampshire College financial aid office. We will compare your FAFSA data with the information provided on this worksheet. If there are differences we will update your FAFSA, and if necessary, recalculate your eligibility for federal and institutional aid. If you have any questions about this process, please call us at 413.559.5484 or email us at [financialaid@hampshire.edu](mailto:financialaid@hampshire.edu).

**IMPORTANT:** This form must be received by the financial aid office within 60 days of us requesting it.

## SECTION A: Student's Information

College ID or Social Security # \_\_\_\_\_

Student's Last Name \_\_\_\_\_ First Name \_\_\_\_\_ M.I. \_\_\_\_\_ Student's Date of Birth \_\_\_\_\_

Student's Street Address (include apt. number) \_\_\_\_\_ Student's Phone Number \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Student's Email Address \_\_\_\_\_

Student Status (circle one): New student Continuing student

## SECTION B: Number of Household Members and Number in College

In the chart below please list the names, ages, and relationships of all household members. Include the name of the college for any household member (other than parents) who will be attending college, at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institution.

**Dependent students** (parents' data included on FAFSA): List the people in your parents' household including:

- Yourself, even if you don't live with your parents;
- Your parents (including step-parent); do not include non-custodial parent unless this parent is living in the home;
- Your parents' other dependent children if your parents will provide more than half of their support from July 1, 2023 through June 30, 2024, or if they would be required to give parental information when applying for federal student aid;
- Other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support through June 30, 2024. Do not include foster children.

**Independent students** (parents' data not included on FAFSA): List the people in your household including:

- Yourself;
- Your spouse, if married;
- Your children, if you will provide more than half of their support between July 1, 2023 through June 30, 2024;
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2023 through June 30, 2024. Do not include foster children.

Full Name	Age	Relationship	College (see qualifications above)
		SELF	Hampshire College

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Student's Name: \_\_\_\_\_

Student's ID Number: \_\_\_\_\_

### SECTION C: Verification of 2021 Income

If you are single and a dependent student, we will need to verify your and your parents' 2021 income (the parents are those who are listed on your FAFSA). If you are married, we need to verify your and your spouse's 2021 income. If you are single and an independent student, we will need to verify your 2021 income. Income may be verified by the methods listed below. Please review each of these methods to see if they apply to you, your parents, and/or your spouse:

1. If you, your spouse, and/or your parents filed a 2021 IRS income tax return, the easiest and fastest way to verify income is to use the Data Retrieval Tool (DRT) on the FAFSA. Hampshire College will receive a new FAFSA report indicating that the DRT was used to import income and tax data from the IRS. Information about the IRS Data Retrieval Tool is available on our website, <https://financialaid.hampshire.edu>; click on the Verification Process link on the first page.

**Check here ☐ if you and/or your parents or spouse filed a 2021 IRS income tax return and used or will use the DRT to verify 2021 income; you and/or your parents (or spouse) may now skip to Section E.**

2. Some tax filers are not eligible to use the DRT including those who are married but filed separately or those who filed an amended tax return. If you are not able to use the DRT you may request a 2021 IRS Tax Return Transcript directly from the IRS. You will then send the transcript to the Hampshire College financial aid office; be sure student's name is written on the transcript. OR, you may send us a SIGNED copy of the actual 2021 IRS 1040 tax return. Please send us the first two pages of the tax return along with Schedules 1, 2, and 3, if applicable. Be sure that at least one of the tax filers sign the form on the Sign Here line on Page 2. Please sign by using a pen. Instructions on how to request a Tax Return Transcript are available on our website, <https://financialaid.hampshire.edu>; click on the Verification Process link on the first page.

**Check here ☐ if you and/or your parents or spouse filed a 2021 IRS income tax return and will request a Tax Return Transcript or will send us a SIGNED copy of the 2021 IRS 1040 tax to verify 2021 income; you and/or your parents (or spouse) may now skip to Section E.**

3. If you, your spouse, and/or your parent did not file, and was not required to file, a 2021 IRS income tax return please check the appropriate box(es) below that apply and follow the corresponding instructions:

☐ 3A: Student was not employed and had no income from work in 2021 and was not required to file a 2021 IRS income tax return. **If checked and if student is a dependent student, student may skip to Section E. If checked and if student is an independent student, student may skip to Section D. A dependent student is one whose FAFSA requires information about one's parent(s). An independent student is one whose FAFSA does NOT require information about one's parent(s).**

☐ 3B: Student's spouse was not employed and had no income from work in 2021 and was not required to file a 2021 IRS income tax return. **If checked, student's spouse may now skip to Section D.**

☐ 3C: Both custodial parents were not employed and had no income from work in 2021 and were not required to file a 2021 IRS income tax return. **If checked, parents may now skip to Section D.**

☐ 3D: Student, spouse, or one or both custodial parents, were employed in 2021 and had earnings from work but were not required to file a 2021 IRS tax return. **If checked, please complete the non-tax filing statement below and then continue to Section D.**

#### NON-TAX FILING STATEMENT – to be completed only if the box to Question 3D in Section C above is checked

Employer's Name	Amount earned by Student Non-tax filer	Amount Earned by Parent Non-tax filer (if dependent student) OR Amount Earned by Spouse Non-tax filer (if married student)
	\$	\$
	\$	\$
	\$	\$

Note: For each amount listed in the non-tax filing statement above, you must provide the financial aid office with copies of 2021 IRS W-2 forms issued to the student, spouse, or parents. List every employer even if the employer did not issue a W-2 form.

Continued on next page

Student's Name: \_\_\_\_\_

Student's ID Number: \_\_\_\_\_

**SECTION D: Verification of Non-tax filing – Read to learn if this applies to you or your parent(s)**

- If you, your spouse, and/or your parent(s) each filed a 2021 income tax return with the IRS or other relevant tax authority, you DO NOT need to complete this section and you may skip to Section E.
- If you are a dependent student and did not file a 2021 income tax return you DO NOT need to complete this section and you may skip to Section E. A dependent student is one whose FAFSA requires information about one's parent(s).
- If you are a dependent student and one or both of your custodial parents did not file a 2021 income tax return you DO need to provide documentation to verify the non-tax filing of the parent(s). A dependent student is one whose FAFSA requires information about one's parent(s).
- If you are an independent student and did not file a 2021 income tax return you DO need to provide documentation to verify non-tax filing. An independent student is one whose FAFSA does NOT require information about one's parent(s).

If you are required to verify non-tax filing as outlined above, we need the "Verification of Non-filing Letter" from the IRS or other relevant tax authority dated on or after October 1, 2022 confirming that a 2021 income tax return was not filed.

For instructions on how to verify non-tax filing, please visit our website at: <https://financialaid.hampshire.edu> and click on the Verification Process link on the first page, OR visit <https://www.hampshire.edu/financial-aid/verifying-non-tax-filing>.

NOTE: If you have a spouse or parents who did not file a 2021 IRS income tax return, your spouse or both parents must complete a separate Form 4506-T.

If you are required to verify non-tax filing, enter the date the completed Form 4506-T was sent to the appropriate IRS processing center: \_\_\_\_\_

**SECTION E: Certification and Signatures**

Each person signing below certifies that all of the information reported is complete and accurate. The student and one parent whose information was reported on the 2023-2024 FAFSA must sign and date. Please sign using a pen.

**Referral of Fraud Cases:** If we suspect that a student, employee, or other individual has misreported information or altered documentation fraudulently to obtain federal funds, we report our suspicions and provide any evidence to the U.S. Office of Inspector General.

**WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
Student's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's (or Spouse's) signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent's email address

**Please note: You are almost done. Please continue with Section F on the other side.**

For Office Use Only: Date FAA Access updated \_\_\_\_\_

Continued on next page

Student's Name: \_\_\_\_\_

Student's ID Number: \_\_\_\_\_

## SECTION F: Identity & Statement of Educational Purpose

The student must verify his or her identity by one of the following two methods:

1. Appear in person at the financial aid office at Hampshire College by presenting a valid government-issued photo identification (ID) (cannot be expired), such as, but not limited to, a driver's license, other state-issued ID, or passport. The college will maintain a copy of the student's photo ID that is annotated with the date it was received and reviewed and the name of the college official authorized to receive and review the student's ID. In addition to the ID document, the student must sign, in the presence of a Hampshire College official, the following *Statement of Educational Purpose* provided below.
2. If the student is unable to appear in person at Hampshire College to verify his or her identity, the student may sign the *Statement of Educational Purpose* in front of a notary public and must provide the following to the Hampshire College financial aid office:
  - A copy of the valid government-issued photo ID (cannot be expired) that is acknowledged in the notary statement below, such as, but not limited to a driver's license, other state-issued ID or passport; and
  - The original notarized *Statement of Educational Purpose* provided below. We need a "wet" signature which means we cannot accept a faxed copy of the signed Statement.

### *Statement of Educational Purpose*

I certify that I \_\_\_\_\_ am the individual signing this *Statement of Educational Purpose* and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending Hampshire College for 2023-2024.

\_\_\_\_\_  
Student's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's ID number:

### *Notary's Certificate of Acknowledgement*

State of \_\_\_\_\_

County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_, personally  
(date) (name of notary public)

appeared, \_\_\_\_\_, and proved to me on basis of

(printed name of signer)  
satisfactory evidence of identification \_\_\_\_\_

(type of unexpired government-issued photo ID provided)

to be the above-named person who signed the foregoing instrument.

**Witness my hand and official seal**

\_\_\_\_\_  
Notary signature

My commission expires on \_\_\_\_\_

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# Verification Process Checklist for 2023-2024

**Please use this guide to help facilitate the completion of the verification process for your aid application:**

1. Be sure to read the instructions for each section on this Worksheet carefully and thoroughly.
2. Write your name (the student) and Hampshire College ID number on top of pages 2 & 3 of this Worksheet.
3. If employers and amounts of earnings are reported in the Non-tax filing statement in Section C of this worksheet, we need copies of the 2021 W-2 forms from each listed employer.
4. We need the "Verification of Non-filing Letter" from the IRS if you are an independent student and did not file a 2021 IRS income tax return OR if you are a dependent student and your parent(s) did not file a 2021 IRS income tax return. We do not need this IRS document if a 2021 tax return was filed or if you are a dependent student who did not file a 2021 IRS income tax return. See Section D of the Worksheet for more information.
5. If you have not yet used the Data Retrieval Tool (DRT) on the FAFSA you may make a correction to your FAFSA to use the DRT to help verify 2021 income and tax data.
6. If you are unable to use the DRT you may either send us a copy of the 2021 IRS Tax Return Transcript for the appropriate tax filer: student, spouse, or parent(s) (be sure NOT to request the tax account transcript) OR you may send us a SIGNED copy of the actual 2021 IRS 1040 tax return for the appropriate tax filer; send us Pages 1 & 2 and Schedules 1, 2, and 3, if applicable. Please sign using a pen.
7. If you are mailing any documents to the financial aid office be sure that the student's name is written on each form so we may match it to your file. Please do not send documents to us via email.
8. Visit our website at <https://financialaid.hampshire.edu> for information about the verification process.
9. Review the common omissions listed below to help avoid any delays in the verification process.
10. Feel free to call the financial aid office at 413.559.5484 to speak with someone about the process.

## **Avoid these common omissions which may delay the processing of your Worksheet**

- **IMPORTANT:** Please note that the *Statement of Educational Purpose* (Section F) must have "wet" signatures. This means that this form CANNOT be faxed to us. Please mail or hand-deliver this completed form to the Financial Aid Office, Hampshire College, 893 West Street, Amherst, MA 01002-3359.
- Write your name (student) and Hampshire College ID number at top of each page.
- If you are a dependent student be sure to include your parent(s) in Section B.
- Your parent(s)' names MUST match the names reported on your FAFSA.
- If a sibling is attending college during the 2023-2024 academic year be sure to indicate the name of the college in Section B.
- If you (the student) were not employed in 2021, did not have any earnings from work in 2021, and was not required to file a 2021 IRS income tax return, be sure to check the box to statement 3A in Section C.
- If both of your parents were not employed in 2021, did not have any earnings from work in 2021, and were not required to file a 2021 IRS income tax return, be sure to check the box to statement 3C in Section C.
- If you (the student) or your parents were employed in 2021 and had earnings from work but were not required to file a 2021 IRS tax return, be sure to check the box to statement 3D in Section C and complete the Non-tax filing statement below Box 3D. We also need a copy of each 2021 W-2 form(s) from each listed employer.
- If you signed the *Statement of Educational Purpose* in front of a Notary Public be sure to include a copy of the valid (not expired) identification used when you signed the form.
- Be sure that Section E has your signature (the student) and a parent's signature, if applicable. Please sign using a pen. Include your parent's email address in case we have any questions.
- **This Worksheet MUST be received by the financial aid office within 60 days of us requesting it. If it is not received within the 60 days we will need to notify the U.S. Department of Education.**

## **Requesting an IRS Tax Return Transcript**

- If you need to request an IRS Tax Return Transcript you may request one by mail, online, or phone. Be sure that you request the Tax Return Transcript and not the tax account transcript. More information may be found at the [www.irs.gov](http://www.irs.gov) website or at our website at <https://financialaid.hampshire.edu>; click on the Verification Process link on the first page.

Thank you for your assistance with the verification process. Feel free to call the financial aid office at 413.559.5484 with any questions you may have about the process.