



2016 - 2017 INCOME VERIFICATION REQUIREMENTS

In addition to the Verification Worksheet we are also required to verify your and your parents' 2015 income as reported on your FAFSA. Please use the following as a guide to assist us in your income verification process:

- In most cases, financial aid offices are no longer able to use data from actual tax returns to verify income. We can only use data provided directly from the IRS. Students and parents may submit their federal tax information to us via the FAFSA form by using the Data Retrieval Tool (DRT) on the FAFSA or by providing us with a copy of their 2015 IRS Tax Return Transcript.
- We strongly encourage you and your parent(s) to use the IRS Data Retrieval Tool on the FAFSA. This is the fastest method to verify income. This tool imports the required data from your 2015 federal income tax return to your FAFSA form. Be sure not to make any changes to the data that is transferred. Altering data will result in a rejected correction and you will then need to provide us with a copy of your IRS Tax Return Transcript. You will need to wait at least three weeks after the tax return was filed electronically before using the DRT.
- To use the IRS Data Retrieval Tool to update your federal tax data on the FAFSA log into the student's FAFSA by visiting www.fafsa.gov and enter the student's FSA ID and password, then click "Make FAFSA Corrections." If you initially estimated your federal tax data, in the "Financial Information" section, change your tax filing status from "will file" to "already completed." The IRS Data Retrieval Tool will then be available to use. Do this for both the student and parent information if both have completed tax returns. After the IRS data has been transferred to the FAFSA be sure to click on the "Sign & Submit" tab at the top of the page to electronically sign the FAFSA. If you experience any problems with the IRS Data Retrieval Tool, please call the Federal Student Aid hotline at 1.800.433.3243 for help.
- After we receive the updated FAFSA report with the imported IRS tax data, the income verification process is complete.

Please note that we must verify both the student's income as well as the parents' income. If the student had earnings from work in 2015 but was not required to complete a 2015 federal tax return, the student may provide their 2015 income information in the Non-Tax Filing Statement on the Verification Worksheet.

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NOTE: There are certain tax filing statuses that make students or parents unable to use the IRS Data Retrieval Tool on the FAFSA. Please check the chart below to see if your tax filing status is ineligible to use the IRS Data Retrieval Tool and, if so, what forms you now must provide to the financial aid office.

Tax Return Status Ineligible to use Data Retrieval Tool	Form(s) you must provide the financial aid office
Parent or student filing as Married filing separately	A copy of each tax filer's 2015 IRS Tax Return Transcript
Parent or student is married and filing as Head of Household	A copy of 2015 IRS Tax Return Transcript
Parent or student filing an amended tax return	A copy of 2015 IRS Tax Return Transcript AND a signed copy of the IRS 1040X Tax Return (complete amended return)
Parent or student filing a Puerto Rican or foreign tax return	A signed copy of actual tax return

If you need to provide us with a Tax Return Transcript please visit our website for instructions on how to request one at <https://financialaid.hampshire.edu>; click on the link on the first page in the 2016-17 Verification Process section. You may also visit the IRS website at www.irs.gov.

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More information about the verification process is available at <https://financialaid.hampshire.edu>; on the first page click on the links in the 2016-17 Verification Process section.

Please return the Verification Worksheet, any documentation for the Worksheet, and the Tax Return Transcript, if required, to the Financial Aid Office, Hampshire College, 893 West Street, Amherst, MA 01002. Or you may fax the documents to 413.559.5585. Please be sure that the student's name appears on any form you are sending us.

If you have any questions, please call us at 413.559.5484 or email us at financialaid@hampshire.edu.