

Aggregate Verification Worksheet (V5) 2017-2018



Your 2017-2018 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.

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's marital status: Single Married Separated Student Status: New student Continuing student (circle one)

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, 2017 and June 30, 2018, 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;
- Your parents' other dependent children if your parents will provide more than half of their support from July 1, 2017 through June 30, 2018, 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, 2018. 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 provide more than half of their support between July 1, 2017 through June 30, 2018;
- 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, 2017 through June 30, 2018. Do not include foster children.

Full Name	Age	Relationship	College (see qualifications above)
		<i>SELF</i>	<i>Hampshire College</i>

Student's Name: _____

Student's ID Number: _____

SECTION C: Verification of 2015 Income

If you are single and a dependent student we will need to verify your and your parents' 2015 income (the parents are those who are listed on your FAFSA). If you are married, we need to verify your and your spouse's 2015 income. If you are single and an independent student we will need to verify your 2015 income. We CANNOT accept a copy of an actual tax return to verify income. Income may be verified by one of the three 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 2015 IRS income tax return, the best way to verify income is to use the IRS Data Retrieval Tool (DRT) on the FAFSA. Information about the DRT process is available at our website, <https://financialaid.hampshire.edu>, or refer to the attached Income Verification Requirements notes on the sixth page. If no 2015 IRS income tax return was filed see #3 below.

Check here if you and/or your parents or spouse filed a 2015 IRS income tax return and will use the DRT to verify 2015 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, those who indicate married on the FAFSA but filed as Head of Household, or those who filed an amended tax return. These tax filers must request a 2015 IRS Tax Return Transcript directly through the IRS. You will then need to send the transcript to the Hampshire College financial aid office. Information about the IRS Tax Return Transcript Request process is available at our website, <https://financialaid.hampshire.edu>; scroll down to the Verification Process section. If no income 2015 IRS income tax return was filed see #3 below.

Check here if you and/or your parents or spouse filed a 2015 IRS income tax return and will request a Tax Return Transcript to verify 2015 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 2015 IRS income tax return please check the appropriate boxes below that apply and follow the corresponding instructions:

3A: Student was not employed and had no income from work in 2015 and was not required to file a 2015 IRS income tax return. **If checked, student may skip to Section D.**

3B: Student's spouse was not employed and had no income from work in 2015 and was not required to file a 2015 IRS income tax return. **If checked, student's spouse may skip to Section D.**

3C: Both custodial parents were not employed and had no income from work in 2015 and were not required to file a 2015 IRS income tax return. **If checked, parents may skip to Section D.**

3D: Student, spouse, or one or both custodial parents, were employed in 2015 and had earnings from work but were not required to file a 2015 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)
	\$	\$
	\$	\$
	\$	\$

IMPORTANT: If any information is listed in the non-tax filing statement above you must provide the financial aid office with all 2015 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.

Please note that if any of the boxes in Section C, Question 3 above are checked then you, your spouse, or your parent will need to provide proof that you or they did not file a 2015 IRS income tax return. Please review Section D for more information.

Student's Name: _____

Student's ID Number: _____

SECTION D: Verification of Non-Tax Filing

If you, your spouse, and/or your parent each filed a 2015 IRS income tax return you may skip to Section E.

If you, your spouse, and/or your parent did not file a 2015 IRS income tax return we need documentation from the IRS indicating that a 2015 IRS income tax return was not filed with the IRS. Please continue to read this section for information on how to provide this required documentation.

To satisfy this requirement you must complete the IRS Form 4506-T. You may print a copy of Form 4506-T at our website, <https://financialaid.hampshire.edu>; scroll down to the Verification Process section, or at www.irs.gov; enter 4506-T in the Forms search box. Follow these instructions:

1. Form 4506-T is one page with two pages of instructions. Be sure to enter the correct Social Security number and write legibly. Complete lines 1a, 1b, and 3. Do not enter anything on line 5. On line 7, check the box at the extreme right. On line 9, enter 12 / 31 / 2015 for the tax period end date in the first box.
2. Check the box above the Signature line. Sign and date the form. Enter your phone number. If you have a spouse or parent who also did not file a 2015 IRS income tax return your spouse or parent must complete a separate Form 4506-T.
3. You must mail or fax the Form 4506-T to the Odgen, UT or to the Cincinnati, OH IRS processing center depending on where you lived in 2015. Refer to the instruction page to determine which one is appropriate for you. DO NOT send the form to the Austin, Fresno, or Kansas City centers which are also listed in the instructions.
4. Most Form 4506-T requests are processed within 10 business days. When you receive the written document from the IRS please send it to us at the address or fax number listed on page six. If the name on the IRS document is different than yours please indicate your name on the document so we may match it to your file and explain if it is for your spouse or parent.

Enter date completed Form 4506-T form sent to the appropriate IRS office: _____

SECTION E: High School Completion Status

We need to verify your completion of a high school program or its equivalent. Hampshire College must have one of the following documents that will indicate the student's high school completion status when the student is enrolled in 2017-2018:

- A copy of the student's high school diploma.
- A copy of the student's final official high school transcript that shows the date when the diploma was awarded.
- A state certificate or transcript received by the student after the student passed a State-authorized examination (GED test, HiSET, TASC, or other State-authorized examination) that the State recognizes as the equivalent of a high school diploma. Please specify the name of the examination: _____
- For students who completed secondary education in a foreign country, a copy of the "secondary school leaving certificate" or other similar document.
- An academic transcript that indicates the student successfully completed at least a two-year program that is acceptable for full credit toward a bachelor's degree.
- If State law requires a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), a copy of that credential.
- If State law does not require a homeschooled student to obtain a secondary school completion credential for homeschool (other than a high school diploma or its recognized equivalent), we need a copy of a transcript or the equivalent, signed by the student's parent or guardian, that lists the secondary school courses the student completed and includes a statement that the student successfully completed a secondary school education in a homeschool setting.

Check here if you provided the Hampshire College admissions office with one of the documents listed above. Please circle the bullet in the list above which corresponds to the specific document. We will verify that they have the document and if the admissions office has it you will not need to send another copy to the financial aid office.

If the student is unable to provide one of the above documents, please contact the Hampshire College financial aid office.

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 or scanned 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 2017-2018.
(print student's name)

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 _____

Continued on next page

Student's Name: _____

Student's ID Number: _____

SECTION G: 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 2017-2018 FAFSA must sign and date.

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

IMPORTANT: Please note that the *Statement of Educational Purpose* must have "wet" signatures. This means that this form CANNOT be faxed or scanned to us. Please mail or hand-deliver this completed form to the Financial Aid Office, Hampshire College, 893 West Street, Amherst, MA 01002-3359. Thank you for your assistance with the verification process.

2017 - 2018 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. You will need to wait at least three weeks after the tax return was filed electronically before using the DRT; longer if filed by paper.
- The DRT imports the required data from your IRS 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.
- 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 assistance.

Please note that we must verify both the student's income as well as the parents' income. If the student, spouse, or parent had earnings from work in 2015 but was not required to complete a 2015 IRS income tax return, the student or parent may provide their 2015 income information in the Non-Tax Filing Statement on the Verification Worksheet. We will also need copies of the student's and parent's W-2 forms. If the student, spouse, or parent did not file a 2015 IRS income tax return we need verification that an IRS income tax return was not submitted.

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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 reported as married on FAFSA and filing as Head of Household	A copy of 2015 IRS Tax Return Transcript, AND possibly other documents to prove that parents are now separated
Parent or student filing an amended tax return	A copy of 2015 IRS Tax Return Transcript AND a signed copy of the Revised 1040 Tax Return AND a signed copy of the 1040X Tax Return (completed 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 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 Verification Process section.

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Please return the Verification Worksheet, any documentation for the Worksheet, and the Tax Return Transcript, if required, to the Hampshire College financial aid office. Please note that the *Statement of Educational Purpose* must have "wet" signatures. This means that this form CANNOT be faxed or scanned to us. Please mail or hand-deliver this completed form to the Financial Aid Office, Hampshire College, 893 West Street, Amherst, MA 01002-3359. 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.