

Household Resources Worksheet (V6) 2016-2017



Your 2016-2017 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, 2016 and June 30, 2017, 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, 2016 through June 30, 2017, 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, 2017.

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, 2016 through June 30, 2017;
- 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, 2016 through June 30, 2017.

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

Continued on next page

Student's Name: _____

Student's ID Number: _____

SECTION C: Child Support Paid to another Household

Check here if NO child support was paid to another household in 2015, and skip to Section D.

If you (or your parents if you are a dependent student or your spouse if you are married) paid child support in 2015 to another household please complete the following chart. Do not include support for children included in Section B above.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name & Age of Child for Whom Support was Paid	Amount of Child Support Paid in 2015
		Age:	\$
		Age:	\$

Note: If we have reason to believe that the information regarding child support paid is not accurate, we may require additional documentation, such as:

- A signed statement from the individual receiving the child support certifying the amount of child support received, or
- Copies of the child support payment checks or money order receipts.

SECTION D: Receipt of SNAP Benefits

Did you (or your parents for dependent students) or anyone in your household (or your parents' household for dependent students) receive benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as the Food Stamps Program) sometime during 2014 or 2015?

(Circle one) **YES** **NO**

Note: If we have reason to believe that the information regarding the receipt of SNAP benefits is inaccurate, we may require documentation from the agency that issued SNAP benefits in 2014 or 2015.

SECTION E: 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 or will file a 2015 federal 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, financialaid.hampshire.edu, or refer to the attached Income Verification Requirements notes on the last page.

Check here if you and/or your parents or spouse plan to file a 2015 federal income tax return and will use the DRT to verify 2015 income; you and/or your parents (or spouse) may now skip to Section F.

2. Some tax filers are not eligible to use the DRT including those who are married but filing separately or those who are filing an amended tax return. These tax filers must request a 2015 IRS Tax Return Transcript directly through the IRS which will be sent to you. You will then need to send the transcript to the financial aid office. Information about the IRS Tax Return Transcript Request process is available at our website, financialaid.hampshire.edu, or refer to the attached Income Verification Requirements notes on the last page.

Check here if you and/or your parents or spouse plan to file a 2015 federal 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 F.

Student's Name: _____

Student's ID Number: _____

SECTION E: Verification of 2015 Income (continued)

- 3. If you, your spouse, and/or your parent will not file, and are not required to file, a 2015 federal income tax return please check the appropriate box(es) that apply and follow the corresponding instructions:
 - 3A: Student was not employed and had no income from work in 2015. **If checked, student may skip to Section F.**
 - 3B: Student's spouse was not employed and had no income from work in 2015. **If checked, student's spouse may skip to Section F.**
 - 3C: Both custodial parents were not employed and had no income from work in 2015. **If checked, parents may skip to Section F.**
 - 3D: Student, spouse, or one or both custodial parents, were employed in 2015 and had earnings but was not required to file a federal tax return. **If checked, please complete the non-tax filing statement below and then continue to Section F.**

NON-TAX FILING STATEMENT – to be completed only if the box to Question 3D in Section E 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, student's spouse, or parents. List every employer even if the employer did not issue an IRS W-2 form. We may require you to provide documentation from the IRS that indicates a 2015 IRS income tax return was not filed with the IRS.

SECTION F: Other Untaxed Income for 2015

In this section you need to report any untaxed income for 2015 for yourself, your spouse, and/or your parents. If any item does not apply, enter "N/A" for Not Applicable where a response is requested, or enter 0 for a question where an amount is requested. Do not leave any item blank or it will delay the verification process.

_____ **2015 IRS W-2 forms:** We need a copy of all 2015 IRS W-2 forms issued by the employers to the dependent student and the student's parents or to the independent student and spouse, if the student is married. Please mail, fax, or scan and email these forms to the financial aid office at Hampshire College. Please write the name of the student on all forms.

Date W-2 forms submitted to the financial aid office: _____

If the student was required to provide parental information on the FAFSA answer each question below as it applies to the student AND the student's parent(s) whose information is on the FAFSA.

If the student was not required to provide parental information on the FAFSA, answer each question below as it applies to the student (and the student's spouse, if married) whose information is on the FAFSA.

To determine the correct annual amount of each item: if you paid or received the same dollar amount every month in 2015, multiply that amount by the number of months in 2015 you paid or received it. If you did not pay or receive the same amount each month in 2015, add together the amounts you paid or received each month.

If more space is needed, attach a separate page with the student's name and ID number at the top.

Student's Name: _____

Student's ID Number: _____

SECTION F: Other Untaxed Income for 2015 (continued)

F-1. Payments to tax deferred pension and retirement savings

List any payments (direct or withheld from earnings) to tax-deferred pension and retirement savings plans (e.g., 401(k) or 403(b) plans), including, but not limited to, amounts reported on W-2 forms in Boxes 12a through 12d with codes D, E, F, G, H, and S. Do not include code DD.

Name of Person Who Made the Payment	Total Amount Paid in 2015

F-2. Child Support received

List the actual amount of any child support received in 2015 for the children in your household.

Do not include foster care payments, adoption payments, or any amount that was court-ordered but not actually paid.

Name of Adult Who Received the Support	Name of Child for Whom Support was Received	Amount of Child Support Received in 2015

F-3. Housing, food, and other living allowances paid to members of the military, clergy, and others

Include cash payments and/or the case value of benefits received in 2015.

Do not include the value of on-base military housing or the value of a basic military allowance for housing.

Name of Recipient	Type of Benefit Received	Amount of Benefit Received in 2015

F-4. Veterans non-education benefits

List the total amount of veterans non-education benefits received in 2015. Include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.

Do not include federal veterans educational benefits such as Montgomery GI Bill, Dependents Education Assistance Program, VEAP Benefits, Post-9/11 GI Bill.

Name of Recipient	Type of Veterans Non-education Benefit	Amount of Benefit Received in 2015

Student's Name: _____

Student's ID Number: _____

SECTION F: Other Untaxed Income for 2015 (continued)

F-5. Other untaxed income

List the amount of other untaxed income received in 2015 and not reported and not excluded elsewhere on this form. Include untaxed income such as workers' compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040, Line 25, Railroad Retirement Benefits, etc.

Do not include any items reported or excluded in items F-1 through F-4 above. In addition, do not include student financial aid, Earned Income Credit, Additional Child Tax Credit, Temporary Assistance to Needy Families (TANF), untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act (WIA) educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.

Name of Recipient	Type(s) of Other Untaxed Income	Amount of Other Untaxed Income Received in 2015

F-6. Money Received or paid on the student's behalf

List any money received or paid for on the student's behalf (e.g., payment of student's bills) and not reported elsewhere on this form. Enter the total amount of cash support the student received in 2015. Include support from a parent whose information was not reported on the student's 2016-2017 FAFSA, but do not include support from a parent whose information was reported. For example, if someone is paying rent, utility bills, etc., for the student or gives cash, gift cards, etc., include the amount of that person's contributions **unless the person is the student's parent whose information is reported on the student's 2016-2017 FAFSA.**

Amounts paid on the student's behalf also include any distributions to the student from a 529 plan owned by someone other than the student or the student's parents, such as grandparents, aunts, and uncles of the student.

Purpose of money received (cash, rent, books, travel, etc.)	Amount Received in 2015	Source

F-7. Additional Information

So that we can fully understand the student's family's financial situation, please provide below information about any other resources, benefits, and other amounts received by the student and any members of the student's household. This may include items that were not required to be reported on the FAFSA or other forms submitted to the financial aid office including this form.

In this section, please include income from SNAP (food stamps), TANF (welfare payments), SSI, untaxed Social Security, federal veterans education benefits, Earned Income Credit, Additional Child Tax Credit, military housing, etc.

Name of Recipient	Type of Financial Support	Amount of Financial Support Received in 2015

Student's Name: _____

Student's ID Number: _____

SECTION F: Other Untaxed Income for 2015 (continued)

F-7: Additional Information (continued)

Comments: You may include additional comments regarding other untaxed income received in 2015.

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 2016-2017 FAFSA must sign and date.

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 mail this completed form to the Financial Aid Office, Hampshire College, 893 West Street, Amherst, MA 01002-3359 or you may fax it to 413.559.5585. Thank you for your assistance with the verification process.

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 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.

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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.