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2024–2025 Verification Worksheet: Dependent Student

At Holyoke Community College, we want to make sure that everyone has an equal chance to go to college, no matter who they are. We know that getting money to pay for college is important, so we promise to be fair when we give out financial aid. We also want to make sure that trans and gender-expansive students don't face any barriers in accessing financial aid. If you have questions or concerns about this, you can talk to the financial aid office.

Your 2024–2025 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to HCC's Financial Aid Office. If you have questions about verification, contact us at 413-552-2150.

A. Student Information

Last Name	First Name	M.I.	Student ID
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B. Student's Family Information

Instructions: Complete the below chart for your family size according to the FAFSA definition.

Family Size includes the following:

- Yourself (the student)
- Your parents, even if you are not living with them.
 - Exclude a parent who has died or is not living in the household because of separation or divorce.
 - Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- Your siblings, if all the following are true:
 - They live with your parents (or live apart because of college enrollment),
 - They receive more than half of their support from your parents, AND They will continue to receive more than half their support from your parents from July 1, 2024 through June 30, 2025
- Other persons if all the following are true:
 - They live with your parents,
 - They receive more than half of their support from your parents, AND
 - They will continue to receive more than half their support from your parents from July 1, 2024 through June 30, 2025

Note: The provided criteria for “dependent children” or “other persons” align with the requirement that family size align with whom the parent could claim as a dependent on a U.S. tax return if the parent were to file a U.S. tax return at the time of completing the 2024-2025 FAFSA. As a result, parents should not include any unborn children in the family size. If more space is needed, please provide a separate page with your name and student ID at the top.

Full Name (required)	Age (required)	Relationship
<i>Your Name (example)</i>	<i>18</i>	<i>self</i>

C. Verification of 2022 Income Information for Parent Tax Filers

Important Note: The instructions below apply to each parent included in the family size on the FAFSA. Notify the financial aid office if the parents had a change in marital status after December 31, 2022.

Instructions: Complete this section if the parents filed or will file a 2022 IRS income tax return(s). If a tax transcript needs to be requested, please see instructions on page 4.

Check all that apply:

- I/We consented to transfer the 2022 IRS income tax information and it was successfully transferred into the FAFSA.
 - In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.
- I/We consented to transfer the 2022 IRS income tax information and it was not transferred into the FAFSA.
 - If the 2022 income tax return information for the parent was not available or could not be used, provide the HCC Financial Aid Office with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules. If the parents filed "married filing separately", both parents' tax return transcripts for 2022 will need to be sent to us.
- I/We filed an amended IRS Income Tax Return for 2022
 - Provide a signed copy of the 2022 IRS Form 1040X "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:
 - Updated income and tax information from the IRS on a FAFSA record with all tax information from the original return;
 - A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; OR
 - A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS

D. Verification of 2022 Income Information for Student Tax Filers

Instructions: Complete this section if the student filed or will file a 2022 IRS income tax return(s). If a tax transcript needs to be request, please see instructions on page 4.

Check all that apply:

- I consented to transfer the 2022 IRS income tax information and **it was successfully transferred** into the FAFSA.
 - In most cases, no further documentation is needed to verify 2022 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.
- I consented to transfer the 2022 IRS income tax information and **it was not transferred into the FAFSA.**
 - If the 2022 income tax return information for the parent was not available or could not be used, provide the HCC Financial Aid Office with a 2022 IRS Tax Return Transcript(s) or a signed copy of the 2022 income tax return and applicable schedules.
- I filed an amended IRS Income Tax Return for 2022
 - Provide a signed copy of the 2022 IRS Form 1040X "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:
 - Updated income and tax information from the IRS on an ISIR record with all tax information from the original return;
 - A 2022 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all the income and tax information required to be verified; OR
 - A signed copy of the 2022 IRS Form 1040 and the applicable schedules that were filed with the IRS

E. Verification of 2022 Income Information for Non-Tax Filers

Instructions: Complete this section **ONLY** if parents and/or student will not, **and were not required to, file a 2022 income tax return** with the IRS. The term “parents” refers to the parent or parents included in the family size of the FAFSA. Follow each of the steps below.

Step 1: Parent Non-Tax Filer - check the appropriate box below:

- Neither parent was employed and nor had income earned from work in 2022.
- One or both parents were employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or equivalent document was provided. List every employer, even if the employer did not issue an IRS W-2 form. If additional space is needed, provide a separate page including the student’s name and HCC ID number.

Employer’s Name	Name of Parent Employed	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2022
			\$
			\$
			\$
			\$
Total Amount of Income Earned from Work			\$

Step 2: Student Non-Tax Filer - check the appropriate box below:

- Student was not employed and had no income earned from work in 2022.
- Student was employed in 2022 and have listed below the names of all employers, the amount earned from each employer in 2022, and whether an IRS W-2 form or an equivalent document was provided. List every employer even if the employer did not issue and IRS W-2 form. If additional space is needed, provide a separate page which includes the student’s name and HCC ID number.

Employer’s Name	IRS W-2 or Equivalent Document Provided by Employer?	Annual Amount Earned in 2022
		\$
		\$
		\$
		\$
Total Amount of Income Earned from Work		\$

Step 3: Submit copies of all 2022 W-2 Forms issued to the parents and students with any income in 2022.

F. Certification and Signatures

The financial aid office may request additional documentation upon review of your worksheet and income information.

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student’s Signature

Date

Parent’s Signature

Date

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For more information on processing and verification deadlines, please visit <http://www.hcc.edu/finaid/deadlines>.

Instructions for obtaining for obtaining a tax transcript.

A 2022 IRS Tax Return Transcript may be obtained through:

- Get Transcript Online
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Get Transcript by Mail
 - Go to www.irs.gov
 - Click "Get Your Tax Record."
 - Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and NOT the "Account Transcript."
 - The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Automated Telephone Request
 - Call 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form
 - IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.