



Aggregate Verification Worksheet (V5) 2023-2024

Office of Financial Aid

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 Springfield College Office of Financial Aid. 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, please contact us at 413.748.3108 or for ROCE students: 413.748.3112 or via email @ financialaid@springfieldcollege.edu.

SECTION A: Student's Information

College ID: _____

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, 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;
- 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 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	Springfield College

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 one of 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 your parents filed a 2021 IRS income tax return, the best way to verify income is to request it through the data retrieval tool (DRT) on your 2023-24 FAFSA. Or you may need to request the IRS tax transcript by visiting their website (www.irs.gov). You will then need to upload the transcript to Springfield College on My Financial Aid.
 - 1A: Parent(s) filed a 2021 IRS income tax return and used the Data Retrieval Tool (DRT) on the FAFSA.
 - 1B: Parent(s) filed a 2021 IRS income tax return and will request a Tax Return Transcript to verify 2021 income.
 - 1C: Parent(s) filed a 2021 Federal (1040) tax return with schedules - **Signatures required**
 - 1D: Parent(s) was not employed and had no income from work in 2021 and was not required to file a 2021 IRS income tax return.*
 - 1E: Parent(S) 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 attach all W-2's.***

2. If you or your spouse filed a 2021 IRS income tax return, the best way to verify income is to request it through the data retrieval tool (DRT) on your 2023-24 FAFSA. Or you may need to request the IRS tax transcript by visiting their website (www.irs.gov). You will then need to upload the transcript to Springfield College on My Financial Aid.
 - 2A: Student filed a 2021 IRS income tax return and used the Data Retrieval Tool (DRT) on the FAFSA.
 - 2B: Student or spouse filed a 2021 IRS income tax return and will request a Tax Return Transcript to verify 2021 income.
 - 2C: Student filed a 2021 Federal (1040) tax return with schedules - **Signature required**
 - 2D: Student and spouse was not employed and had no income from work in 2021 and **was not required** to file a 2021 IRS income tax return.
 - 2E: Student or spouse, 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 attach all W-2's.***

***Independent students or parents of dependent students who did not file (and were not required to file) a 2021 IRS income tax return will also need to provide documentation from the IRS that a return was not filed. You can obtain this by filing IRS form 4506-T and checking box #7 or requesting a 2021 Tax Transcript or a 2021 Tax Account Transcript that includes a message such as “no records of a return filed” or “no transcript on file”.**

NON-TAX FILING STATEMENT – to be completed only if the box to Question 1E or 2E in Section C above is checked

Employer's Name	Amount earned by <u>Student Non-tax filer - 2021</u>	Amount Earned by <u>Parent Non-tax filer</u> (if dependent student) OR Amount Earned by <u>Spouse Non-tax filer</u> (if married student) <u>in 2021</u>
	\$	\$
	\$	\$
	\$	\$

Student's Name: _____

Student's ID Number: _____

IMPORTANT: If any information is listed in the non-tax filing statement on Page #2 you must provide the financial aid office with all 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. Please redact the first five digits of all Social Security Numbers and all bank account numbers of any document sent to the Office of Financial Aid.

SECTION D: Identity & Statement of Educational Purpose: (To Be Signed at the Institution)

The student must appear in person at Springfield College to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below. **Identity and Statement of Educational Purpose (To Be Signed in the Presence of a Notary) If the student is unable to appear in person at Springfield College to verify his or her identity, the student must provide to the institution: (a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and (b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.**

Statement of Educational Purpose:

I certify that I _____ am the individual signing this Statement of
(Print student's Name)

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 Springfield College for 2023–2024.

Student's Signature: _____ Date: _____

Student's ID Number: _____

***For Springfield College Use only:
Authorization form which was signed at the Institution***

Name of Springfield College employee

Signature of authorized Springfield College employee

Date viewed documents and signing statement

Student's Name: _____

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 _____

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.

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 are required to 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, sentenced to jail, or both.

Student's signature (**ink**)

Date

Parent's (or Spouse's) signature (**ink**)

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 Office of Financial Aid, Springfield College, 263 Alden Street, Springfield, MA 01109-3797.**

If you have any questions, please contact us at 413.748.3108 or for ROCE students: 413.748.3112 or via email @ financialaid@springfieldcollege.edu.

Thank you for your assistance with the verification process.

Update on 9/1/22