

## 2026-2027 INDEPENDENT VERIFICATION WORKSHEET

Your financial aid application has been selected for review in a process called verification. The law says that we must ask you to confirm the information you reported on your FAFSA. We will compare your FAFSA with the information on this institutional verification form and with any other required documents. If needed, we will make corrections to your FAFSA electronically. If you have questions about verification, contact your campus One Stop as soon as possible so that your financial aid will not be delayed. You must complete and sign this institutional verification document, attach any required documents, and submit the form and other required documents to the Financial Aid Office.

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**Student Name**

**UMASS Global ID Number**

### A. Household Information:

List the people in your household, along with their relationship to you and their ages. For any household member attending college at least half time in a degree, certificate or diploma program between **July 1, 2026 and June 30, 2027**, please indicate the college attended. Attach additional pages if necessary. Member of your household include:

- You and your spouse (if married).
- Your children and your spouse's children (even if they don't live with you) if you will provide more than half of their support from July 1, 2026 through June 30, 2027. Do not include children for whom you pay child support unless you provide more than half of their support.
- Other people if they now live with you, *and* you (or your spouse) provide **more than half of their support and will continue to provide more than half of their support** through June 30, 2027.

*Note: If you are including a parent or another adult (not including your spouse) in the household, complete the Support Statement Form. The form is located on the [UMassGlobal.edu forms center](http://UMassGlobal.edu/forms) page. Additional documentation may be required if we have reason to believe that the information regarding the household members is inaccurate.*

Full Name	Age	Relationship to Student	Is this person attending college at least half-time?	College Name <small>(do not abbreviate)</small>
		<i>Self</i>	Yes	<i>UMass Global</i>

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**Student Name**

**UMASS Global ID Number**

**B. Income Verification:**

The best way to verify income (if you have already filed your 2024 tax return) is by giving consent to FAFSA on the web to retrieve your **IRS Federal tax information (IRS FTI)** . In some cases, further documentation is needed to verify income tax return information. You can obtain a 2023 IRS Tax Return Transcript by going to [www.irs.gov](http://www.irs.gov). If you did not file a tax return, you must provide a confirmation of non-filing which can be obtained from the IRS using Form 4506-T and checking box 7.

**Check the box that applies to you:**

<input type="radio"/>	I have <u>used</u> the IRS FTI to transfer IRS income tax return information into my FAFSA.																		
<input type="radio"/>	I have <u>not yet used</u> the IRS FTI, but will use the tool to transfer IRS income tax return information into my FAFSA.																		
<input type="radio"/>	<p>I am <u>unable to use</u> the IRS FTI, and instead will provide a <b>IRS Tax Return Transcript</b>. If the student and spouse filed separate 2023 IRS income tax returns, IRS Tax Return Transcripts must be provided for <u>both</u>.</p> <p style="margin-left: 40px;">My <b>2024 IRS Tax Return Transcript(s)</b> have been submitted.</p> <p style="margin-left: 40px;">My <b>2024 IRS Tax Return Transcript(s)</b> will be provided on: _____</p>																		
<input type="radio"/>	<p style="text-align: center;">_____</p> <p>I (and my spouse, if married) were not employed and had <u>no income earned from work</u> in 2024 and were not required to file a Federal Income Tax Return. I have submitted an <b>IRS Statement of Non-Filing</b></p>																		
<input type="radio"/>	<p>I (and my spouse, if married) was <u>employed</u> in 2024 but <u>will not file</u> and am <u>not required to file</u> a Federal Income Tax Return. List below the names of all employers and the amount earned from each. Submit copies of all W-2s issued from employers. If you do not have copies of your W-2s you can obtain a Wage and Income Transcript from <u>IRS.gov</u>.</p> <p style="text-align: center;">I have submitted an <b>IRS Statement of Non-Filing</b></p> <p style="margin-left: 40px;">My <b>2024 W-2s</b> issued to me and my spouse by employers have been submitted.</p> <table style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">Employer's Name:</th> <th style="text-align: left; border-bottom: 1px solid black;">W2 Provided?</th> <th style="text-align: left; border-bottom: 1px solid black;">Amount Earned:</th> </tr> </thead> <tbody> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">\$ _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">\$ _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">\$ _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">_____</td> <td style="border-bottom: 1px solid black;">\$ _____</td> </tr> <tr> <td></td> <td style="text-align: right;">Total:</td> <td style="border-bottom: 1px solid black;">\$ _____</td> </tr> </tbody> </table>	Employer's Name:	W2 Provided?	Amount Earned:	_____	_____	\$ _____	_____	_____	\$ _____	_____	_____	\$ _____	_____	_____	\$ _____		Total:	\$ _____
Employer's Name:	W2 Provided?	Amount Earned:																	
_____	_____	\$ _____																	
_____	_____	\$ _____																	
_____	_____	\$ _____																	
_____	_____	\$ _____																	
	Total:	\$ _____																	

I certify that all of the information reported on this worksheet is complete and correct.

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**Student Signature**

**Date**

*(handwritten signature only, electronic signatures are not acceptable)*

**WARNING: If you purposely give false or misleading information you may be fined, be sentenced to jail, or both.**

**Submit completed form via the student portal OR**  
**Mail:** UMass Global, Financial Aid Office, 65 Enterprise #150, Aliso Viejo, CA 92656