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2026–2027 Verification Worksheet: Independent 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 2026–2027 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. You and at least one (1) 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, please contact us at 413-552-2150.

A. Student Information

| | | | |
|-----------|------------|------|------------|
| Last Name | First Name | M.I. | Student ID |
|-----------|------------|------|------------|

B. Student’s Family Information

Step 1 – Instructions: Complete the below chart for your family size according to the FAFSA definition. Family Size includes the following:

- Yourself (the student)
- Your spouse, if applicable
- Your dependent children, if all the following are true:
 - They live with you (or live apart because of college enrollment),
 - They receive more than half of their support from you, AND
 - They will continue to receive more than half their support from you from July 1, 2026 through June 30, 2027
- Other persons if all the following are true:
 - They live with you,
 - They receive more than half of their support from you, AND
 - They will continue to receive more than half their support from you from July 1, 2026 through June 30, 2026.

Note: The criteria for "dependent children" and "other persons" aligns with the requirement that family size reflect whom the parent could claim as a dependent, if the parent were to file a U.S. tax return at the time of completing the 2026–2027 FAFSA. Therefore, parents should not include unborn children in the family size. If more space is needed, please attach 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 2024 Income Information for Student Tax Filers

Instructions: Complete this section ONLY if the student filed or will file a 2024 IRS income tax return(s). If a tax transcript needs to be requested, please see instructions on page 4.

Check all that apply:

- I consented to transfer the 2024 IRS income tax information and it was **successfully transferred** into the FAFSA.
 - In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS.
- I consented to transfer the 2024 IRS income tax information and it was **NOT transferred** into the FAFSA.
 - If the 2024 income tax return information for the student and spouse (if applicable) was not available or could not be used, provide the HCC Financial Aid Office with a 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules. If the student and spouse (if applicable) filed "married filing separately," both the student and spouse's tax return transcripts for 2024 will need to be sent to us.
- I filed an amended IRS Income Tax Return for 2024
 - Provide a signed copy of the 2024 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 2023 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 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

D. Verification of 2024 Income Information for Non-Tax Filers

Instructions: Complete this section ONLY if the student and/or spouse **were not required to file, and will not file**, a 2024 IRS income tax return. Follow each step below.

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

- Student was not employed and had no income earned from work in 2024.
- Student was employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form or equivalent documentation 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 | IRS W-2 or Equivalent Document Provided by Employer? | Annual Amount Earned in 2024 |
|--|--|------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| Total Amount of Income Earned from Work | | \$ |

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

- Spouse was not employed and had no income earned from work in 2024.
- Spouse was employed in 2024 and have listed below the names of all employers, the amount earned from each employer in 2024, and whether an IRS W-2 form or an equivalent document is 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 2024 |
|--|--|------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| Total Amount of Income Earned from Work | | \$ |

Step 3: Submit copies of all 2024 W-2 Forms issued to the parents and students with any income in 2024.

E. 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

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

Instructions For Obtaining A Tax Transcript:

A 2024 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.