



2024-2025 VERIFICATION WORKSHEET

FEDERAL STUDENT AID PROGRAMS

INDEPENDENT

Your application was selected for review in a process called "Verification." In this process, Carroll College will be comparing information from your application with your educational records (if necessary), as well as your (and your spouse's, if married) financial documents. The law requires the college to review this information before awarding Federal aid. If there are differences between your application information and your financial documents, Carroll College will make corrections electronically and notify you in writing.

Complete this verification form and submit it to the Carroll College Financial Aid Office **as soon as possible**, so your financial aid won't be delayed. Our office will be glad to assist you.

Verification must be completed no later than the first day of class. **Failure to complete verification will result in the cancellation of all federal aid.**

In addition:

- No federal grant(s) will be released until verification is completed.
- No federal loan(s) will be released until verification is completed.
- Students employed under the federal work-study program cannot work more than 60 consecutive days from the beginning of the semester without completing verification.

Carroll College must review the requested information, under the financial aid program rules (34 CFR, Part 66

A. Student Information

_____	_____	_____	_____
Last name	First name	M.I.	ID#
_____		_____	
Address (include apt. no.)		Phone number (Cell-include area code)	
_____	_____	_____	
City	State	Zip Code	

B. Family Information

1. Family size: includes the following:

- Yourself (the student)
- your spouse, if you are married, and
- your children, if (a) they live with you (or live apart because of college enrollment), (b) you provide more than half of their support and (c) will continue to provide more than half of their support from July 1, 2024 through June 30, 2025, and
- 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, 2024 through June 30, 2025.

The provided criteria for "dependent children" or "other person" align with the requirement that family size align with whom the student could claim as a dependent on a US tax return if the student were to file a US tax return at the time of completing the 2024-2025 FAFSA. As a result, the student should not include any unborn children in the family size.

Full Name	Age (as of 1/1/2024)	Relationship
		Self

Submit this worksheet to the Carroll College Office of Financial Aid through your Self-Service via your OKTA account. Or mail to 1601 N. Benton Ave. Helena, MT 59625-0002 800-992-3648 Ext. 5425 Email fao@carroll.edu (Do NOT email Personal Identifiable Information (PPI) such as tax forms) Fax number 406-447-5187

C. STUDENT Tax and Income Information (all applicants)**Independent**

Please notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2022 or had a change in marital status since January 1, 2023.

1. Check only one Tax box below.
 - Check here if your tax return information was not available through IRS direct data exchange or could not be used and you will be submitting a signed copy of your 2022 Federal Tax Return and all applicable Schedules (1,2, or 3) or IRS Tax Return Transcript(s) to Carroll College. A 2022 IRS tax transcript can be obtained through www.irs.gov – “get your tax record”.
 - Check here if you will not file and are not required to file a 2022 U.S. Income Tax Return and will provide signed and dated non-filing statement or a letter of non-filing from the IRS. To obtain a letter of non-filing call the IRS at 800-908-9946 or print and mail IRS form 4506-T.
2. If you did not file and are not required to file a 2022 Federal income tax return, check boxes that apply:
 - I was not employed and had no income earned from work in 2022
 - I was employed and have listed below all employer(s) and any income received in 2022. W-2 statements MUST be submitted for each source of employment income to Carroll College.

Sources	2022 Income	IRS W-2 Attached
	\$	

D. Spouse (s)’ Tax and Income Information (if student is married)

1. Check only one Tax box below.
 - Check here if your tax return information was not available through IRS direct data exchange or could not be used and you will be submitting a signed copy of your 2022 Federal Tax Return and all applicable Schedules (1,2, or 3) or IRS Tax Return Transcript(s) to Carroll College. A 2022 IRS tax transcript can be obtained through www.irs.gov – “get your tax record”.
 - Check here if you will not file and are not required to file a 2022 U.S. Income Tax Return and will provide a signed and dated non-filing statement or a letter of non-filing from the IRS. To obtain a letter of non-filing call the IRS at 800-908-9946 or print and mail IRS form 4506-T.
2. If you, the spouse, did not file and is not required to file a 2022 Federal income tax return, check boxes that apply:
 - I was not employed and had no income earned from work in 2022
 - I was employed in 2022 and listed below each employer(s) and any income received in 2022. All W-2 statements must be submitted for each source of employment.

Sources	2022 Income	IRS W-2 Attached
	\$	

E. Sign this Worksheet - Each person signing this form certifies that all information report on it is **complete and correct**.

If married, spouse’s signature is optional.

Student Date

Spouse Date

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