



2027-2028 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 rule (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 dependent children, if all of the following are true: (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 during the award year (July 1, 2027 through June 30, 2028), 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 during the award year (July 1, 2027 through June 30, 2028).

The provided criteria for “dependent children” or “other persons” mirror the requirement that family size align with those 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 2027-2028 FAFSA. As a result, the student should not include any unborn children in the family size.

Full Name	Age	Relationship
Missy Jones (example)	18	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 faa@carroll.edu (Do NOT email Personal Identifiable Information (PPI) such as tax forms) Fax number 406-447-5187

THE INSTRUCTIONS BELOW APPLY TO THE STUDENT AND SPOUSE (IF THE STUDENT IS MARRIED).

Please notify the financial aid office if you or your spouse filed separate IRS income tax returns for 2025 or had a change in marital status since January 1, 2026.

Check only one Tax box below:

- ☐ Check here if your 2025 income tax return information was not transferred via the FA-DDX and considered verified, and you will be submitting a **signed** copy of your 2025 Federal Tax Return and all applicable Schedules (1 and 3) or IRS Tax Return Transcript(s) to Carroll College. A 2025 IRS tax transcript can be obtained through www.irs.gov – “Get Your Tax Record” – “Get Transcript by Mail”.
- ☐ By checking this box, I certify that I have not filed and are not required to file a 2025 U.S. Income Tax Return, and I have listed all income earned from work, other income, and resources for the 2025 tax year.

Also check any box that applies below:

- ☐ My spouse and I were not employed and had no income earned from work in 2025
- ☐ My spouse and/or I were employed in 2025 and have listed below the names of all employers, the amount earned from each employer, and whether an IRS W-2 from or an equivalent document was provided. Copies of all 2025 IRS W-2 statements **MUST** be submitted for each source of employment income to Carroll College. List every employer even if the employer did not issue an IRS W-2 form.

Employer’s Name	2025 Income	IRS W-2 or equivalent document provided?

- ☐ My spouse and/or I had other income and resources that supported us for the 2025 tax year. List each source of income in the table below.

Sources of income (example – rental property)	2025 Income

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

StudentDate

SpouseDate

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