Carroll College

2023-2024 VERIFICATION WORKSHEET

FEDERAL STUDENT AID PROGRAMS   DEPENDENT

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 parents' 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 668).

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. List **ALL** the people in your <u>parents' household</u>, include:

   - Yourself and your parent(s) (including stepparent) even if you don't live with your parents, and
   - Your parents' other children, even if they don't live with your parents(s), if (a) your parents will provide more than half of their support from July 1, 2023 through June 30, 2024, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
   - 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 from July 1, 2023 through June 30, 2024.

2. Write the name of the college for any household member, excluding your parent(s) 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. If you need more space, attach a separate page.

Full Name	Age (as of 1/1/2023)	Relationship	College enrolled for the 2023/2024 academic year.
Missy Jones (example)	18	Sister	Carroll College
		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)

1. Check only one Tax box below.

❑ Check here if you will or have downloaded your income tax information directly from the IRS using the IRS Data Retrieval tool (IRS DRT). If you did not elect to use data retrieval on original FAFSA make a correction today: www.fafsa.gov.

❑ Check here if you are unable to use the Data Retrieval process through IRS for one of the acceptable reasons (check one):
   ☐ My tax filing status is **anything** other than **single**   ☐ I filed a Puerto Rican or foreign tax return
   ☐ My marital status has changed since January 1, 2022

   If you are unable to use the IRS DRT process you MUST submit a *signed* copy of your Federal Tax Return.

❑ Check here if you will be submitting a signed copy of your Federal Tax Return and all accompanying Schedules (1,2, or 3) to Carroll College**.**

❑ Check here if you will not file and are not required to file a 2021 U.S. Income Tax Return and were unable to obtain a letter of non-filing from the IRS.

2. If you did not file and are not required to file a 2021 Federal income tax return, list below your employer(s) and any income received in 2021. You <u>MUST</u> submit W-2 statements for each source of employment income to Carroll College.

Sources	2021 Income	IRS W-2 Attached
	$	

D. PARENT(s)' Tax and Income Information

1. Check only one Tax box below.

❑ Check here if you will or have downloaded your income tax information directly from the IRS using the IRS Data Retrieval tool (IRS DRT). If you did not elect to use data retrieval on original FAFSA make a correction today: www.fafsa.gov.

❑ Check here if you are unable to use the Data Retrieval process through IRS for one of the acceptable reasons (check one):
   ☐ My tax filing status is Married Filing Separately   ☐ I filed a Puerto Rican or foreign tax return
   ☐ My tax filing status is Married, but I filed Head of Household   ☐ My marital status has changed since January 1, 2022
   ☐ Marital status is "unmarried & both parents living together"

   If you are unable to use the IRS DRT process you MUST submit a *signed* copy of your Federal Tax Return.

❑ Check here if you will be submitting a signed copy of your Federal Tax Return and all accompanying Schedules (1, 2, or 3) to Carroll College**.**

❑ Check here if you will not file and are not required to file a 2021 U.S. Income Tax Return and were unable to obtain a letter of non-filing from the IRS.
   ₒ 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 2021 Federal income tax return, list below your employer(s) and any income received in 2021. You MUST submit W-2 statements for each source of employment income.

Sources	2021 Income	IRS W-2 Attached
	$	

E. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct. The student and at least one parent must sign.

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

_____   _____
Student   Date

_____   _____
Parent   Date

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