Carroll College

2025-2026 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 Size Information

1. Family size includes:

   - Yourself
   - Your parents (including stepparent, if applicable) even if you don't live with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the US Armed Forces apart from the family.
   - Your siblings if **all** of the following are true: a) they live with your parents (or live apart because of college enrollment), b) your parents will provide more than half of their support during the award year (July 1, 2025 through June 30, 2026), and c) they will continue to receive more than half their support from your parents during the same award year.
   - Other persons if **all** of the following are true: a) they live with your parents, b) your parents will provide more than half of their support during the award year (July 1, 2025 through June 30, 2026), and c) they will continue to receive more than half their support from your parents during the same award year.

The provided criteria for "dependent children" or "other persons" mirror the requirement that family size align with those the parent could claim as a dependent on a U.S. tax return if the parent were to file a US tax return at the time of completing the 2025-2026 FAFSA. As a result, the parent should not include any unborn children in the family size.

Full Name	Age	Relationship
Missy Jones (example)	18	Self

C. STUDENT Tax and Income Information (all applicants)

Check only one Tax box below:

❑ Check here if your 2023 income tax return information was not transferred via the FA-DDX and considered verified, and you will be submitting a **signed** copy of your 2023 Federal Tax Return and all applicable Schedules (1 and 3) or IRS Tax Return Transcript(s) to Carroll College. A 2023 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 2023 U.S. Income Tax Return, and I have listed all income earned from work, other income, and resources for the 2023 tax year.**

Also check any box that applies below:

❑ I was not employed and had no income earned from work in 2023
❑ I was employed in 2023 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 2023 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.
❑ I had other income and resources that supported me for the 2023 tax year.

Employer's Name/Other income sources	2023 Income	IRS W-2 or equivalent document provided?

D. PARENT(s)' Tax and Income Information

THE INSTRUCTIONS and CERTIFICATIONS BELOW APPLY TO EACH PARENT (OR STEPPARENT, if applicable) included in the household.

Check only one Tax box below:

❑ Check here if your parents' 2023 income tax return information was not transferred via the FA-DDX and considered verified, and they will be submitting a **signed** copy of your 2023 Federal Tax Return and all applicable Schedules (1 and 3), or IRS Tax Return Transcript(s) to Carroll College. A 2023 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 neither parent has filed nor is required to file a 2023 U.S. Income Tax Return, and all of their income earned from work, other income, and resources for the 2023 tax year are listed below.**

Also check any box that applies below:

❑ I certify that neither parent was employed and had no income earned from work in 2023
❑ One or both of my parents were employed in 2023 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 2023 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.
❑ One or both of my parents had other income and resources that supported us for the 2023 tax year.

Employer's Name/Other Income Sources	2023 Income	IRS W-2 or equivalent document provided?

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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