

2021-2022 Verification Worksheet for Federal Student Aid Programs

The federal government selected your Free Application for Federal Student Aid (FAFSA) for review in a process called "Verification". In this process the law requires Carleton to compare information from your 2021–2022 FAFSA application with the 2019 federal tax records, W-2 forms, or other financial documents before awarding Federal Student Aid. If there are differences, your FAFSA information may need to be corrected.

You and at least one parent that was listed on the FAFSA, must complete and sign this **Verification Worksheet**, attach any required documents, and submit to our office within two weeks so that your aid won't be delayed. We are unable to award you federal aid until verification is complete. If you have questions about verification, do not hesitate to contact our office at (507) 222-4138 or financialaid@carleton.edu.

Student Information

| | | | |
|------------------------------------|---------------|--|---------------------|
| Name (last, first, middle initial) | Date of Birth | Last 4 digits of Social Security Number XXX-XX- | Carleton Student ID |
|------------------------------------|---------------|--|---------------------|

Family Information

- A. List members in your parent's household. **If your biological parents are divorced**, report the information for the parent that is listed on the FAFSA. Even if you don't live with your parent(s) you must report parent household information. Only include those family members who live in the same household with you and your parent(s). Eligible household members include the following:
- Yourself
 - Your parent(s), as listed on the FAFSA. Include a step-parent if your parent on the FAFSA has remarried.
 - Other children of the parents as defined above, be sure to include children even if they do not live with the parents if:
 - The parent(s) will provide more than half of their support from July 1, 2021, through June 30, 2022.
 - They would be required to provide parental information if they were completing the FAFSA for 2021–2022.
 - Other people if they now live with your parent(s) **and** your parent(s) provide more than half of their support **and** will continue to provide more than half of their support through June 30, 2022.
- B. If any family member of your parent(s) household – other than parent or stepparent – is or will be enrolled in a degree or certificate program beyond high school between July 1, 2021 and June 30, 2022, list the College, University or other postsecondary institution they will attend.
- C. For family member enrolled in in a College, University, or postsecondary institution answer if will they be enrolled at least half time in a degree, diploma, or certificate program any time between July 1, 2021, and June 30, 2022.

If more space is needed, attach a separate page with the student's name and Carleton ID at the top.

| Full Name | Age | Relationship | College/University | Will be enrolled at least half time (Yes or No) |
|-----------|-----|--------------|--------------------|---|
| | | Self | Carleton College | Yes |
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(Over)

Parent 2019 Income Information

Have you, the parent(s) as listed on the FAFSA, filed or are you required to file a 2019 federal income tax return?

 Yes Select the method you used/will use for income verification.

- IRS Data Retrieval Tool in FAFSA on the Web (Recommended):** If you have not used this tool, go to www.fafsa.gov, login to your FAFSA record. Select "Make FAFSA Corrections". Navigate to the Financial Information section of the form. Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2019 IRS income tax return information into your FAFSA.
- Tax Transcript:** If you are not eligible to use the IRS Data Retrieval Tool, submit a 2019 IRS Tax Return Transcript to our office or IDOC. To obtain a Tax Return Transcript go to www.irs.gov/transcript. Click the "Get Transcript ONLINE" button. Be sure to request the "Tax Return Transcript". Write the student's name and Carleton ID number on the transcript before submitting.
- Signed Copy of Tax Return:** If you are not eligible to use the IRS Data Retrieval Tool in FAFSA on the Web or request a tax transcript you can send in **signed** copies of your 2019 federal tax forms, including all schedules. Contact Student Financial Services at 507-222-4138 for a secure way to provide these forms.
- Amended (1040X) Tax Return:** If you have filed or intend to file a 2019 IRS 1040X amended tax return, contact Carleton Student Financial Services at (507) 222-4138 for instructions on documentation to provide.
- Foreign Tax Return:** If you have filed or intend to file a 2019 foreign tax return, submit a **signed** copy of the completed foreign tax return to IDOC or our office.

 No Submit the following document:

- Verification of Non-Filing Letter for 2019. To obtain a Verification of Non-Filing Letter go to www.irs.gov/transcript. Click the "Get Transcript ONLINE" button. Be sure to request the Verification of Non-Filing (VONF) letter. Or a signed statement that states you attempted to obtain the Verification of Non-Filing letter and, have not filed and are not required to file taxes for the year. **And** complete the income grid below.

| Employer Name | Who Worked Here | 2019 Amount Earned | W-2 Attached? |
|---------------|-----------------|--------------------|---------------|
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Student 2019 Income Information

Have you, the student, filed or are you required to file a 2019 federal income tax return?

 Yes Select the method you used/will use for income verification.

- IRS Data Retrieval Tool in FAFSA on the Web (Recommended):** If you have not used this tool, then go to www.fafsa.gov, login to your FAFSA record. Select "Make FAFSA Corrections". Navigate to the Financial Information section of the form. Follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2019 IRS income tax return information into your FAFSA.
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- Foreign Tax Return:** If you have filed or intend to file a 2019 foreign tax return, submit a **signed** copy of the completed foreign tax return to IDOC or our office.

 No Complete the income grid below.

| Employer Name | Who Worked Here | 2019 Amount Earned | W-2 Attached? |
|---------------|-----------------|--------------------|---------------|
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Sign this worksheet

By signing this Worksheet, we certify that all the information reported is complete and correct. Student and at least one parent whose information was reported on the FAFSA must sign and date. **WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

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|---|------------|---|------------|
| Student Signature _____ | Date _____ | Parent Signature _____ | Date _____ |
| Send to: Carleton College - Student Financial Services One North College Street, Northfield, MN 55057 | | Or e-mail to: financialaid@carleton.edu Or Fax to: (507) 222-4269 | |