

2023-2024 Verification Worksheet

Directions - PLEASE read instructions carefully.

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 2023–2024 FAFSA application with the 2021 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 the parent that completed the FAFSA, must complete and sign this **Verification Worksheet**. We ask that you submit any required documents to our office within two weeks of notification so that your aid won't be delayed. 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
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Family Information

List members in your parent's household. **If your biological parents are divorced**, report the information for the parent that completed 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 the parent that completed the FAFSA has remarried.
- Parents children, be sure to include children/step-children even if they do not live with the parents if:
 - The parent(s) will provide more than half of their financial support from July 1, 2023, through June 30, 2024.
 - Your parent would be required to provide parental information on the 2023-2024 FAFSA for that child.
- Other people if they now live with your parent(s):
 - **AND** your parent(s) provide more than half of their financial support
 - **AND** will continue to provide more than half of their support through June 30, 2024.

Note: If any family member of your parent(s) household – other than parent or stepparent – is currently or will be enrolled in a degree or certificate program beyond high school between July 1, 2023 and June 30, 2024, list the College, University or other Postsecondary institution they will attend. For each of these family members please indicate if they will be enrolled at least half time.

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

(Over)

Parent 2021 Income Information

Have you, the parent(s) as listed on the FAFSA, filed or are you required to file a 2021 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 2021 IRS income tax return information into your FAFSA.
- Tax Transcript:** If you are not eligible to use the IRS Data Retrieval Tool, submit a 2021 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 2021 federal tax forms, including all schedules. Contact Student Financial Aid 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 2021 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 2021 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 2021. 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	2021 Amount Earned	W-2 Submitted?

Student 2021 Income Information

Have you, the student, filed or are you required to file a 2021 federal income tax return?

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

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No Complete the income grid below.

Employer Name	Who Worked Here	2021 Amount Earned	W-2 Submitted?

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.**

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