

# 2012 - 2013 Verification Worksheet

## Federal Student Aid Programs

**DEPENDENT**

The federal government selected your application for review in a process called "Verification." In this process, Carleton is required to compare information from your application with 2011 IRS tax records for you and your parent(s) and W-2 forms or other financial documents. Federal regulations require us to collect and compare this information before awarding federal aid. If there are differences between your application information and your financial documents, Carleton may need to make corrections electronically.

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

**What you should do:**

1. **Complete, sign, and submit** this worksheet – you and at least one parent must sign.
2. If you have not already done so, submit W-2 forms, etc. and any other requested documents to the above address.
3. Resubmit your FAFSA using the IRS Data Retrieval or submit an IRS tax transcript to the above address.

**A. Student Information**

Last Name	First Name	M.I.	Social Security Number
Address (include apt. no.)			Date of Birth
City	State	ZIP code	(____) _____ Phone Number (include area code)

**B. Family Information**

List the people in your parent(s)' household; 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 parent(s), if (a) your parent(s) will provide more than half of their support from July 1, 2012 through June 30, 2013, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- include other people only 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 from July 1, 2012 through June 30, 2013.

Write the names of all household members in the space(s) below. Also write in 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, 2012 and June 30, 2013 in a program that leads to a college degree or certificate. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
		Self	Carleton College

Student's Name: \_\_\_\_\_

**C. Student's Income Information (all applicants)**

1. TAX RETURN FILERS—**Important Note:** If you, the student, filed, or will file, an amended 2011 IRS tax return, you must contact Student Financial Services at (507) 222-4138 before completing this section.

**Instructions:** Complete this section if you, the student, filed or will file a 2011 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If you have not already used the tool, go to [www.fafsa.gov](http://www.fafsa.gov), log in to your FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when or how to use the IRS Data Retrieval Tool, contact Student Financial Services at (507) 222-4138.

**Check the box that applies:**

- I have used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer my 2011 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
  
- I have not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer my 2011 IRS income information into my FAFSA once I have filed a 2011 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. Carleton cannot complete the verification process until the IRS information has been transferred into the FAFSA.
  
- I am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and will submit to Carleton or IDOC a **2011 IRS tax return transcript**—**NOT** a photocopy of the income tax return. To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "**IRS tax return transcript**" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.
  - Check here if your 2011 IRS tax return transcript is attached to this worksheet.
  - Check here if your 2011 IRS tax return transcript will be submitted to Carleton or IDOC later. Verification cannot be completed until the IRS tax return transcript has been received by Carleton.
  
- I have or will file a **Foreign Tax Return**. Carleton cannot complete the verification process until a **SIGNED** copy of the **2011 foreign tax return** has been submitted to Carleton or IDOC.
  - Check here if your SIGNED 2011 foreign tax return has already been submitted to Carleton or IDOC.
  - Check here if your SIGNED 2011 foreign tax return is attached to this worksheet.
  - Check here if your SIGNED 2011 foreign tax return will be submitted to Carleton or IDOC later.

2. TAX RETURN NONFILERS—Complete this section if you, the student, will not file and are not required to file a 2011 income tax return.

**Check the box that applies:**

- I was not employed and had no income earned from work in 2011.
  
- I was employed in 2011 and have listed below the names of all my employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached or was submitted to IDOC. Attach or submit to IDOC copies of all 2011 IRS W-2 forms issued to you by employers. List every employer even if they did not issue an IRS W-2 form. If you need more space, attach a separate page.

Employer's Name	2011 Amount Earned	IRS W-2 Attached or Submitted to IDOC?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

**- Student's Income Information continued on next page -**

Student's Name: \_\_\_\_\_

**DEPENDENT**

**C. Student's Income Information Continued (all applicants)**

3. Funds received for child support and other untaxed income. (See Question 44 of the Free Application for Federal Student Aid - FAFSA).

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.	\$
Untaxed portions of IRA distributions or pensions from IRS Form 1040—lines (15a minus 15b) and lines (16a minus 16b) or from IRS Form 1040A—lines (11a minus 11b) and lines (12a minus 12b). Exclude rollovers. If negative, enter zero.	\$
Housing, food and other living allowances paid to members of the military, clergy, and others.	\$
Untaxed income from worker's compensation, disability, or veterans noneducation benefits.	\$
Other:	\$

**D. Parent(s)' Income Information**

1. TAX RETURN FILERS—**Important Note:** If your parent(s) filed, or will file, an amended 2011 IRS tax return, the family must contact Student Financial Services at (507) 222-4138 before completing this section.

**Instructions:** Complete this section if your parent(s) filed or will file a 2011 income tax return with the IRS. The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, go to [www.fafsa.gov](http://www.fafsa.gov), log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when or how to use the IRS Data Retrieval Tool, contact Student Financial Services at (507) 222-4138.

**Check the box that applies:**

- My parent(s) has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2011 parent IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA.
  
- My parent(s) has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer parent 2011 IRS income information into my FAFSA once my parent(s) has filed a 2011 IRS tax return. See instructions above for information on how to use the IRS Data Retrieval Tool. Carleton cannot complete the verification process until the IRS information has been transferred into the FAFSA.
  
- My parent(s) is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and my parent(s) will submit to Carleton or IDOC a copy of the parent's **2011 IRS tax return transcript**—NOT a photocopy of the income tax return. To obtain an IRS tax return transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "**IRS tax return transcript**" and not the "IRS tax account transcript." Your parent(s) will need their Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.
  - Check here if your parent(s)' 2011 IRS tax return transcript(s) is attached to this worksheet.
  - Check here if your parent(s)' 2011 IRS tax return transcript(s) will be submitted to Carleton or IDOC later. Verification cannot be completed until the IRS tax return transcript(s) has been received by Carleton.
  
- My parent(s) has or will file a **Foreign Tax Return**. Carleton cannot complete the verification process until a **SIGNED** copy of the parent(s)' **2011 foreign tax return** has been submitted to Carleton or IDOC.
  - Check here if your parent(s)' SIGNED 2011 foreign tax return has already been submitted to Carleton or IDOC.
  - Check here if your parent(s)' SIGNED 2011 foreign tax return is attached to this worksheet.
  - Check here if your parent(s)' SIGNED 2011 foreign tax return will be submitted to Carleton or IDOC later.

**- Parent(s)' Income Information continued on next page -**

Student's Name: \_\_\_\_\_

**D. Parent(s)' Income Information Continued**

2. TAX RETURN NONFILERS—Complete this section if your parent(s) will not file and is not required to file a 2011 income tax return.

**Check the box that applies:**

- My parent(s) was not employed and had no income earned from work in 2011.
- My parent(s) was employed in 2011 and has listed below the names of all the parent's employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached or was submitted to IDOC. Attach or submit to IDOC copies of all 2011 IRS W-2 forms issued to your parent(s) by employers. List every employer even if they did not issue an IRS W-2 form. If you need more space, attach a separate page.

Employer's Name	2011 Amount Earned	IRS W-2 Attached or Submitted to IDOC?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

3. Funds received for child support and other untaxed income. (See Question 92 of the Free Application for Federal Student Aid - FAFSA).

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.	\$
Child support <b>received</b> for all children. Don't include foster care or adoption payments.	\$
Untaxed portions of IRA distributions or pensions from IRS Form 1040—lines (15a minus 15b) and lines (16a minus 16b) or from IRS Form 1040A—lines (11a minus 11b) and lines (12a minus 12b). Exclude rollovers. If negative, enter zero.	\$
Housing, food and other living allowances paid to members of the military, clergy, and others.	\$
Untaxed income from worker's compensation, disability, or veterans noneducation benefits.	\$
Other:	\$

**E. Other Information to Be Verified (all applicants)**

1. **Check one box only.**

- Benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) **were not** received at any time during 2010 or 2011 by someone in the student's parent's household (listed in Section B).
- Benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) **were** received at any time during 2010 or 2011 by someone in the student's parent's household (listed in Section B).

**F. Sign this Worksheet**

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

\_\_\_\_\_  
Student Signature Date

\_\_\_\_\_  
Parent Signature Date

**Send to:**  
Carleton College  
Student Financial Services  
One North College Street  
Northfield, MN 55057

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