OFFICE OF FINANCIAL AID AND VETERANS AFFAIRS
1011 PAGE ST. • TROY, NC 27371 • (910) 898-9600 • FAX: (910) 576-2176
Federal School Code – 008087 · https://www.montgomery.edu/financial-aid

2025-2026
Verification Worksheet

Student Name: _____ **MCC Student ID/SSN #** _____

I. Verification of 2023 IRS Income Tax Return Information

Start Here:
Are you an **independent student** or a **dependent student**?
If you do not know the answer, before continuing, please refer to the questions below.

All applicants for federal student aid are considered either "independent" or "dependent." Dependent students are required to include information about their parents on the FAFSA.

- Were you born before January 1, 2002?
- As of today, Are you married or separated but not divorced?
- Will you be working toward a master's or doctorate degree (M.A., M.B.A., M.D., J.D., Ph.D., Ed.D. etc.)?
- Are you currently serving on active duty in the U.S. armed forces for purposes other than training?
- Are you a veteran of the U.S. armed forces?
- Do you have children or other people (excluding their spouse) who live with you and receive more than half of their support from you now and between July 1, 2025 and June 30, 2026?
- At any time since you turned age 13, were both of your parents deceased, were you an orphan (not living with biological or adoptive parents), were you in foster care, or were you a ward or dependent of the court?
- The student is or was a legally emancipated minor, as determined by a court in their state of residence?
- The student is or was in a legal guardianship with someone other than their parent or stepparent, as determined by a court in their state of residence?
- At any time on or after July 1, 2024, was the student unaccompanied and either (1) homeless or (2) self-supporting and at risk of being homeless?
- Do unusual circumstances prevent the student from contacting their parents or would contacting their parents pose a risk to the student?

If **none** of the criteria listed above apply to you, you may be considered a **dependent student** and may be required to provide your parents' financial information when completing the FAFSA.

If you answered **yes** to any of these questions, then you may be an **independent student**. You may not be required to provide parental information on your FAFSA.

Reference: https://studentaid.ed.gov/sa/fafsa/infographic-accessible

If you are a **Dependent Student,** *continue to page 2 and 3*;
if you are an **Independent Student** *continue to page 2*.

Verification of 2023 Income Information for

Student Tax Filers

Important Note: The instructions below apply to the student and spouse, (if the student is married). Notify the financial aid office if the student and spouse filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the student and spouse filed or will file a 2023 IRS income tax return(s). As part of Federal student aid eligibility, students, and spouses (as appropriate), will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the student and spouse filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the student (or spouse, if applicable) was not transferred via the FA-DDX and considered verified, the student should provide the institution with a **2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.**

A **2023 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS Help Site.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

Verification of 2023 Income Information for

Parent Tax Filers-Dependent Student

Important Note: The instructions below apply to each parent (or stepparent, if applicable) included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2023 or had a change in marital status after December 31, 2023.

Instructions: Complete this section if the parents filed or will file a 2023 IRS income tax return(s). As part of Federal student aid eligibility, parents will be required to consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective. In other words, if the parents filed separate 2023 IRS income tax returns, both must provide consent and approval to share and import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the FA-DDX.

If 2023 income tax return information for the parents was not transferred via the FA-DDX and considered verified, the parents should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules.

A **2023 IRS Tax Return Transcript** may be obtained through:

- Get Transcript by Mail – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and ***NOT*** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.
- Get Transcript Online – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and NOT the "Account Transcript." Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS Help Site.
- Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form

Verification of 2023 Income Information for Individuals with Unusual Circumstances

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023 must provide:

- **A signed statement listing the sources of any 2023 income and the amount of income from each source;**
- **A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;**
- **A copy of IRS Form W–2 for each source of employment income received or an equivalent document for tax year 2023; and**
- **If self-employed, a signed statement certifying the amount of the individual's adjusted gross income (AGI) and the U.S. income tax paid for tax year 2023.**

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- **Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;**
- **A 2023 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or**
- **A signed copy of the 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.**

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- **A copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; and**
- **An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.**

Individuals Who Filed Non-IRS Income Tax Returns

- **A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if the institution questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the institution with a copy of the tax account information issued by the relevant tax authority before verification can be completed.**

II. Verification of 2023 Income Information for Student and/or Parent Nontax Filers

The instructions and certifications below apply to the student and spouse, if the student is married; and/or each parent included in the household (if student is dependent). Complete this section if the student and spouse and/or parent(s) will not file and are not required to file a 2023 income tax return with the IRS.

Check the box that applies

___ The student and spouse were not employed and had no income earned from work in 2023.

___ Neither parent were employed nor had no income earned from work in 2023.

____ The student and/or spouse and/or one or both Parents, were employed in 2023 and have listed below the names of all employers, the amount earned from each employer in 2023, and whether an IRS W-2 form (or equivalent) is provided. [Provide copies of all 2023 IRS W-2 forms issued to the student and spouse by their employers]. List every employer even if the employer did not issue an IRS W-2 form

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

Employer's Name	IRS W-2 or an Equivalent Document Provided?	Annual Amount Earned in 2023
Suzy's Auto Body Shop *(example)*	***YES***	*$4500.00*
Total Amount of Income Earned from Work:	**********	*$*

Complete this section if student and/or spouse and/or one or both parents, had other income and resources that supported us for the 2023 tax year. [List each source of income in the table below. If more space is needed, provide a separate page with your name and ID number at the top.

Source of Income	Annual Amount Earned in 2023
Rental property *(example)*	*$4500.00*
Total Amount of Income:	*$*

Certifications and Signatures

By completing this document, I certify that I have not filed and am not required to file a 2023 income tax return, and I have listed all income earned from work, other income, and resources for the 2023 tax year. The student and one parent whose information was reported on the FAFSA must sign and date.

_____ _____
Print Student's Name MCC Student ID or SSN

_____ _____
Student's Signature Date

_____ _____
Spouse's Signature if Independent and married Date

_____ _____
Parent's Signature if Dependent Date

III. Number of Household Members and Number in College

INDEPENDENT STUDENT Family Size - Includes the following:

- The student.
- The student's spouse, if applicable.
- The student's dependent children if the following are true:
  - o They live with the student (or live apart because of college enrollment);
  - o They receive more than half of their support from the student; and
  - o They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
  - o They live with the student;
  - o They receive more than half of their support from the student; and
  - o They will continue to receive more than half their support from the student during the award year.

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

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

Full Name	Age	Relationship
		Self

DEPENDENT STUDENT Family Size - Includes the following:

- The student.
- The student's parents, (or stepparent, if applicable), even if the student is not living 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 U.S. Armed Forces apart from the family.
- The student's siblings if the following are true:
  - o They live with the student's parents (or live apart because of college enrollment),
  - o They receive more than half of their support from the student's parents, and
  - o They will continue to receive more than half their support from the student's parents during the award year.
- Other persons if the following are true:
  - o They live with the student's parents,
  - o They receive more than half of their support from the student's parents, and
  - o They will continue to receive more than half their support from the student's parents during the 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 U.S tax return at the time of completing the 2025-2065 FAFSA. As a result, the parent should not include any unborn children in the family size.

If more space is needed, provide a separate page with the student's name and ID number at the to

Full Name	Age	Relationship
		Self

Certifications and Signatures

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

Each person signing below certifies that all of the information reported is complete and correct.
The student and/or one parent whose information was reported on the FAFSA must sign and date.

_____ _____
Print Student's Name Student's ID Number

_____ _____
Student's Signature Date

_____ _____
Parent's Signature (required if dependent student) Date

We recommend you make a copy of this worksheet for your records.
Submit this completed worksheet immediately to the MCC Office of Financial Aid and Veterans Affairs:

Montgomery Community College
1011 Page Street
Troy, NC 27371
Fax: 910.576.2176

Montgomery Community College provides equal opportunities to all students, employees and applicants for admission and employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex (including pregnancy), national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

If you would like for our office to correct the information on your student aid report, please read and sign the following: I agree to have my corrections sent electronically by Montgomery Community College's Office of Financial Aid and Veterans Affairs.

Student Signature _____ Date _____

Parent Signature _____ Date _____ (If Dependent Student)

2025-26 (FERPA)Consent and Disclosure Form

Please use this form to authorize the release of your educational records/financial aid application information to a third party including parent(s).
This form must be completed by the student in person with photo identification at Montgomery Community College in the presence of an appropriate staff member. If the student is unable to do so, the form may be notarized by a Notary Public and submitted by mail to the office with which the student is directly interacting.

This form is only valid for the current academic year.

Name: _____
Last First Middle Maiden

Current Mailing Address:
_____

_____
City State Zip

MCC Student ID or SSN: _____ Date of Birth**:** _____Phone: (____) _____

Under Federal legislation, namely the Family Educational Rights and Privacy Act of 1974, (a federal law that protects the privacy of students' educational records), I understand that my education records cannot be released without my written permission or completion of Parental Affidavit of Dependency and Request for Academic Information form by my parent or guardian. Please use this for to authorize the release of your academic records information to a third party. ***This form is only valid for the current academic year.***

Section One: As an applicant/current/former MCC student, I voluntarily authorize the release of the following academic record information to the person or agency listed below:

I. Type of information to be disclosed:
Attendance, Billing, Conduct, Educational/Academic Records, Financial Aid/VA Records; (Current Academic Year)
□ Other (please specify): _____

II. Name and address of person or agency to receive information
(Please note MCC will not release any information over the phone and photo id must be presented in person):
Name: _____Relationship to Student:_____
Address: _____
Email Address (Optional):_____

Section Two: Signature Authorization
Under penalty of perjury my signature below affirms that the information provided above is true and accurate to the best of my knowledge.

Signature _____ Date_____

If not completed in the presence of a MCC Student Services representative, then notarization is required:
On this_____ day of _____, _____, personally appeared before me, the said named _____ known to me to be the person described in and who executed the foregoing instrument and acknowledged that he/she executed the same and being duly sworn by me, made oath that the statements in the foregoing instrument are true.

_____ Commission expires: _____
Signature of Notary Public

Signature _____
Date_____

For Office Use Only
Complete below if the student signed this form and provided valid picture identification to a MCC representative.
MCC Representative (print name) _____ Date _____

We recommend you make a copy of this worksheet for your records. Submit this completed worksheet immediately to the MCC Office of Student Services.
FERPA2025