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**2020-2021 Parent Request for Income Change Review**


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| Last Name | First Name | MI | SWC ID Number |
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Southwestern College's Financial Aid Department recognizes that families may experience significant changes to their income or family circumstances that are not reflected in the original Free Application for Federal Student Aid (FAFSA) used to determine the student's 2020-2021 financial aid eligibility.

Please have your parent(s) complete this form if their income will be less in 2020 than in 2018, or if they have had some other significant changes due to circumstances out of their control. You parent(s) will be required to submit supporting documentation.

**A. Required Documentation**


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*Submit the following information with this form –*

- ◇ A copy of your parent(s)' 2018 IRS Tax Transcript and W-2 form(s). You don't need to submit a 2018 IRS Tax Transcript if you have already provided one as part of the verification process for your 2020-2021 FAFSA.
  - ◇ If you have not completed the verification process, submit a 2020-2021 Dependent Verification Worksheet; complete all sections of Group VI.
  - ◇ If you are submitting your request after March 1, 2020, your parent(s)' may be required to also provide a copy of your 2018 IRS Tax Transcript and W-2 form(s).
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**Required Information Specific to Your Parent(s)' Special Circumstance**

*In addition, please provide the documentation specific to your parent(s)' special circumstance(s) -*

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**Significant Reduction of Income**


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- ◇ A signed statement listing the date employment ended or changed and why.
  - ◇ Copies of your parent(s)' most recent paycheck stub(s) showing year-to-date earning.
  - ◇ Copy of your parent(s)' resignation, termination or layoff notification by employer.
  - ◇ Copy of current official documentation of unemployment compensation, disability insurance, severance pay, retirement pension pay out, and/or other documentation appropriate to your parent(s)' situation.
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**Separation/Divorce**

**Which occurred after the 2020-2021 FAFSA was completed.**

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- ◇ A signed statement listing the date of separation/divorce, names and ages of current household members, monthly amount of child support and/or spousal support and when payments begin or are expected to begin.
  - ◇ If your parent(s) no longer receives child support for one or more of the children, specify the date(s) the child support ended, how many children in the household will continue to receive child support, and how much your parent(s) will receive each month.
  - ◇ Copy of divorce decree or legal separation documents, if available.
  - ◇ Copy of child and/or spousal support decree, if available.
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**One-Time Income Received in 2018.**


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This income will not be received in 2020. Examples include: capital gains from the sale of property or investment, one-time distribution from pension account, severance pay, or inheritance. Do not include: gambling winnings or lottery.

- ◇ Explanation of type and amount of income that was received in 2018 and is a one-time occurrence. Also indicate how this one-time income has been allocated.
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**Significant Reduction of Income after Military Discharge**


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- ◇ Copy of DD Form 214, Member 4. For any employment *after* military discharge, please provide the following:
  - ◇ A signed statement listing the date employment ended or changed and why.
  - ◇ Copies of your parent(s)' most recent paycheck stub(s) showing year-to-date earnings.
  - ◇ Copy of your parent(s)' resignation, termination or layoff notification by employer.
  - ◇ Copy of current official documentation of unemployment compensation, disability insurance, severance pay, retirement pension pay out, and/or other documentation appropriate to your parent(s)' situation.
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**Significant and/or Recurring Medical, Dental, or Nursing Home Expenses Not Covered by Insurance**

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- ◇ Explanation of why these expenses are not covered by insurance
- ◇ If the 2018 Federal Income Tax Return was filed with Schedule A, provide a copy of Schedule A.
- ◇ Copies of billing statement(s) from provider(s).
- ◇ Proof of payment (e.g. credit card statements, copies of canceled checks, bank account withdrawals, etc.) for expenses paid out of pocket.
- ◇ Documentation of continuing expenses not covered by insurance.
- ◇ If continuing expenses, statement from attending physician or State Disability Office.

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**Other Special Circumstances**

Other special circumstances that may justify a Request for an Income Change Review (for example: death) that has occurred since filing the 2020-2021 FAFSA. Please note that additional documentation may be requested.

- ◇ Supporting documentation.
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**Projected/Estimated Income**

Do not leave any item blank – if an item does not apply, write “N/A” or “0.”

| Parent (s) Income Sources<br><i>Report Monthly Amounts</i> | Effective Dates |           | Father | Mother |
|--|-----------------|-----------|--------|--------|
|  | Month/Year      |           |        |        |
|  | Start Date:     | End Date: |        |        |
| Wages/Income from Work                                     |                 |           | \$     | \$     |
| Severance Pay  |                 |           | \$     | \$     |
| Unemployment Compensation/Benefits                         |                 |           | \$     | \$     |
| Worker’s Compensation                                      |                 |           | \$     | \$     |
| Disability Income/Benefits                                 |                 |           | \$     | \$     |
| Pensions/Retirement  |                 |           | \$     | \$     |
| Alimony Received   |                 |           | \$     | \$     |
| Child Support Received                                     |                 |           | \$     | \$     |
| Interest and Dividend Income                               |                 |           | \$     | \$     |
| Other Income (specify source)                              |                 |           | \$     | \$     |

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**Student’s Income**

- ◇ No change
- ◇ Change in income, will also submit a Student Request for Income Change Review

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**B. Certification**

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I certify that all information reported on this form is true and accurate to the best of my knowledge. I have attached all required documentation. If asked, I will provide additional information or documentation of my special circumstances. If my financial situation changes after I submit this form, I will notify the Financial Aid Department immediately.

Submit this appeal and attached documentation to the Financial Aid Office as soon as possible to avoid delays. See website for applicable deadlines. Late appeals may not be approved.

**Submit completed appeals to the Financial Aid Office via Dropbox at <https://go.swccd.edu/dropbox>**

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Student Signature

Date

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Parent Signature

Date

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**PERSONAL STATEMENT OF EXPLANATION:** Tell us why your situation calls for a change to your financial need status. Please be sure to include any supporting documentation or an explanation of why you cannot provide documentation:

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Parent Signature

Date

**2020-2021 Verification Worksheet Dependent Student V-1**

Students submitting a change of Income Appeal must also complete a process called Verification. You and your parent(s), whose information is on the FAFSA, must complete and sign this worksheet, attach any required documents, and submit the form along with any other additional information required by our office.

**A. STUDENT INFORMATION**

Student Name \_\_\_\_\_ SWC ID Number \_\_\_\_\_

**B. FAMILY INFORMATION**

Please indicate person(s) in your parent(s)' household for the period of 7/1/20 to 6/30/21. Include:

**PARENT(S)** (The parent/stepparent, even if you don't live with them)

Parent/Stepparent 1 Name \_\_\_\_\_ Age \_\_\_\_\_

Parent/Stepparent 2 Name \_\_\_\_\_ Age \_\_\_\_\_

**SIBLING(S)** [Any sibling(s) your parent(s) financially support more than 50%, and who would be required to provide parent information if they are completing a 2020-2021 FAFSA]

| Name  | Age   | Full Name of College (if attending more than half time) | Student ID# | Only if attending SWC |
|-------|-------|---|-------------|-----------------------|
| _____ | _____ | _____   | _____       | _____                 |
| _____ | _____ | _____   | _____       | _____                 |
| _____ | _____ | _____   | _____       | _____                 |

**OTHER(S)** [Other people that you or your parent(s) financially support more than 50%, e.g., girlfriend, cousin, grandparent]

Name \_\_\_\_\_ Age \_\_\_\_\_ College \_\_\_\_\_ Student ID# \_\_\_\_\_

Name \_\_\_\_\_ Age \_\_\_\_\_ College \_\_\_\_\_ Student ID# \_\_\_\_\_

Name \_\_\_\_\_ Age \_\_\_\_\_ College \_\_\_\_\_ Student ID# \_\_\_\_\_

*\*\*For additional household members, attach the Verification Supplemental Form*

**C. 2018 INCOME INFORMATION (Complete both the STUDENT and PARENT(S)' section)**

| STUDENT  | PARENT(S)  |
|--|--|
| <p>1. Did you earn wages in 2018?<br/> <input type="checkbox"/> Yes, US wages earned (go to question 2)<br/> <input type="checkbox"/> Yes, foreign wages earned [indicate amount here converted to US dollars \$ _____ ; go to parent(s) section]<br/> <input type="checkbox"/> No [go to parent(s) section]</p> <p>2. Were you required to or did you file a 2018 tax return?<br/> <input type="checkbox"/> Yes (go to question 3)<br/> <input type="checkbox"/> No [please attach copies of ALL W-2's; go to parent(s) section]</p> <p>3. Did you use the IRS Data Retrieval Tool and were you able to transfer your 2018 tax information into your FAFSA?<br/> <input type="checkbox"/> Yes [copy of your IRS tax return transcript not required; go to parent(s) section]<br/> <input type="checkbox"/> No [please attach a copy of your IRS tax return transcript; go to parent(s) section]</p> | <p>1. Did either one or both of your parent(s) earn wages in 2018?<br/> <input type="checkbox"/> Yes (go to question 2)<br/> <input type="checkbox"/> Yes, foreign wages earned (indicate amount here converted to US dollars \$ _____ ; go to section D)<br/> <input type="checkbox"/> No (please attach a copy of the IRS Verification of Non-Filing Letter for each parent; go to section D)</p> <p>2. Were your parent(s) required to or did they file a 2018 tax return?<br/> <input type="checkbox"/> Yes (go to question 3)<br/> <input type="checkbox"/> No (please attach a copy of the IRS Verification of Non-Filing Letter and ALL W-2's for each parent; go to section D)</p> <p>3. Did your parent(s) use the IRS Data Retrieval Tool and were they able to transfer their 2018 tax information into your FAFSA?<br/> <input type="checkbox"/> Yes (copy of their IRS tax return transcript not required)<br/> <input type="checkbox"/> No (please attach a copy of their IRS tax return transcript and ALL W-2's)</p> |

**D. SIGNATURES**

Signing this form certifies that the information reported is complete and correct and that any false statement or failure to provide proof when asked may be cause for delay, denial, reduction, or withdrawal of financial aid. Warning: purposely giving false and/or misleading information may be cause for a fine, sentence to jail, or both.

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

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

## VERIFICATION WORKSHEET DEPENDENT STUDENT V-1 INSTRUCTIONS

The Verification Worksheet Dependent Student V-1 requests 2018 income information about the student and parent(s). If you or your parent(s) filed a 2018 Federal Tax Return, you will need to use the IRS Data Retrieval Tool on the FAFSA **OR** request a 2018 Tax Return Transcript from the IRS and provide a copy to the Southwestern College Financial Aid Office.

Students and parent(s) who earned wages, but DID NOT file a 2018 Federal Tax Return, must provide copies of all W-2's. For parent(s) **ONLY**, if wages were earned from the U.S. and not required to file a 2018 Federal Tax Return, you must also submit an IRS Verification of Non-filing Letter dated on or after 10/1/17, for each parent.

Below you will find instructions on how to request an IRS Tax Return Transcript or Verification of Non-filing Letter. Submit your worksheet along with all requested documents to the SWC Financial Aid Office at the Chula Vista campus or to any of the Student Services Departments at any of the Higher Education Centers.

### Tax Filers: How to use the IRS Data Retrieval Tool

This is the quickest method to verify a 2018 Federal Income Tax Return.

1. Go to FAFSA on the Web at [studentaid.gov](http://studentaid.gov).
2. Login to your account using your FSA ID.
3. Once logged in, click the option to "Make FAFSA Corrections" as this will take you to your completed FAFSA information.
4. If federal taxes have been filed, go to the parent tax information section and update status to "already completed" taxes. Answer series of questions that follow. If "no" is answered to each question, an option will be provided to "link to IRS."
5. Enter your parent FSA ID and password, click on the IRS link, and you will be taken to the IRS website and asked to enter parent information.
6. Enter your parent name and address information EXACTLY as it appears on their 2018 Federal Tax Return.
7. If the tool can locate tax information, click the option to "transfer now."
8. Repeat steps in the student section of the FAFSA if the IRS Data Retrieval Tool needs to be utilized for your tax information.
9. Electronically sign and submit the FAFSA corrections made verifying income. You and your parent must provide your FSA ID to sign electronically.
10. If you are unable to retrieve data, you will need to request an IRS Tax Return Transcript.

### Tax Filers: How to request an IRS Tax Return Transcript

If you cannot, or choose not to, utilize the IRS Data Retrieval Tool, you are required to provide a copy of your and/or your parent(s) 2018 Tax Return Transcript and W-2's.

1. Contact the IRS at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or call 1-800-908-9946.
2. Be sure to request the "IRS Tax Return Transcript" and NOT the "IRS Tax Account Transcript."
3. You will need your and your parent Social Security Number, date of birth, and the address on file with the IRS. The address is the mailing address used when filing the 2018 IRS Federal Tax Return.
4. Alternatively, you and/or your parent can submit a completed paper IRS Form 4506-T Request for Transcript of Tax Return that can be mailed or faxed to the IRS. You must check BOX 6a on the form to request a tax return transcript.

The transcript(s) requested, depending on the time of year, are generally received within 10 business days from the IRS's receipt of your request.

### Non-tax Filers: How to request an IRS "Verification of Non-filing Letter" (PARENT ONLY)

A parent who is a Non-tax filer must submit a 2018 W-2 form for each source of employment income earned in the U.S. **AND** a "Verification of Non-filing Letter" from the IRS dated on or after October 1, 2018, for EACH parent, as this attests that your parent(s) did not file a 2018 IRS Federal Tax Return.

1. Contact the IRS at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or call 1-800-908-9946.
2. Request the "Verification of Non-filing Letter."
3. Your parent can also submit a completed paper IRS Form 4506-T IRS Request for Transcript of Tax Return that can be mailed or faxed to the IRS. You must check BOX 7 on the form to request the "Verification of Non-filing Letter."