

### 2020-2021 Student Request for Income Change Review

Last Name	First Name	MI	SWC ID Number	Date of Birth
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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 complete this form if you (and your spouse's, if married) income will be less in 2020 than in 2018, or if you (and your spouse, if married) have had some other significant changes due to circumstances out of your control. You will be required to submit supporting documentation.

#### A. Required Documentation

*Submit the following information with this form –*

- ◇ A copy of your (and your spouse's, if married) 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 an 2020-2021 Independent Verification Worksheet; complete all sections of Group VI.
- ◇ If you are submitting your request after March 1, 2020, you (and your spouse's, if married) may be required to also provide a copy of your 2020 IRS Tax Transcript and W-2 form(s).

#### Required Information Specific to Your (or Your Spouse's, if married) Special Circumstance

*In addition, please provide the documentation specific to your or your (spouse's, if married) special circumstance(s) -*

##### Significant Reduction of Income (for example reduction of income due to COVID-19)

- ◇ A signed statement listing the date employment ended or changed and why.
- ◇ Copies of your (and your spouse's, if married) most recent paycheck stub(s) showing year-to-date earnings.
- ◇ Copy of your (and your spouse's, if married) 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 (and your spouse's, if married) situation.

##### Separation/Divorce

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

- ◇ 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 you (and your spouse's, if married) no longer receive 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 you (and your spouse's, if married) will receive each month.
- ◇ Copy of divorce decree or legal separation documents, if available.
- ◇ Copy of child and/or spousal support decree, if available.

##### One-Time Income Received in 2018.

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.

##### Significant Reduction of Income after Military Discharge

- ◇ 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 (and your spouse's, if married) most recent paycheck stub(s) showing year-to-date earnings.
- ◇ Copy of your (and your spouse's, if married) 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 (and your spouse's, if married) 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.

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- ◇ **Supporting documentation: Personal Statement Of Explanation required (page 3).**
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**Projected/Estimated Income**

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

Student's (and Spouse's, if married) Income Sources <i>Report Monthly Amounts</i>	Effective Dates		Student	Spouse
	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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**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

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Date

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Spouse Signature

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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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Student Signature

Date

## 2020-2021 Verification Worksheet Independent Student V-1

Students submitting a change of Income Appeal must also complete a process called Verification. You and your spouse, if applicable, 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 household for the period of 7/1/20 to 6/30/21. Include:

**SPOUSE**

Full Name of College (if attending more than half time)

Only if attending SWC

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

**CHILDREN** (Any children you and your spouse, if applicable, financially support more than 50%)

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

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

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

**OTHER(S)** (Other people that you 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****STUDENT and SPOUSE (if applicable)****If Single:**

1. Did you earn wages in 2018?

- ☐ Yes, US wages were earned (go to question 3)
- ☐ Yes, foreign wages were earned (indicate amount here, converted to US dollars \$\_\_\_\_\_; go to section D)
- ☐ No (please attach a copy of the IRS Verification of Non-Filing Letter; go to section D)

**If Married:**

2. Did either you and/or your spouse earn wages in 2018?

- ☐ Yes, US wages were earned (go to question 3)
- ☐ Yes, foreign wages were earned (indicate amount here, converted to US dollars \$\_\_\_\_\_; go to section D)
- ☐ No (please attach a copy of the IRS Verification of Non-Filing Letter for each of you; go to section D)

**If Single and/or Married:**

3. Were you and/or your spouse required to, or did you and/or your spouse, file a tax return?

- ☐ Yes (go to question 4)
- ☐ No (please attach a copy of the IRS Verification of Non-Filing Letter and ALL W-2's; go to section D)

4. Did you and/or your spouse use the IRS Data Retrieval Tool and were able to transfer your tax information into your FAFSA?

- ☐ Yes (copy of your IRS tax return transcript not required; go to section D)
- ☐ No (please attach a copy of your IRS tax return transcript and ALL W-2's; go to section D)

**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 \_\_\_\_\_

**VERIFICATION WORKSHEET INDEPENDENT STUDENT V-1 INSTRUCTIONS**

The Verification Worksheet Independent Student V-1 requests 2018 income information about the student and spouse, if applicable. If you or your spouse 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 spouses who earned wages, but DID NOT file a 2018 Federal Tax Return, must provide copies of all W-2's. 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 you and your spouse.

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 student tax information section and update your 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 student FSA ID and password, click on the IRS link, and you will be taken to the IRS website and asked to enter your student information.
6. Enter your name and address information EXACTLY as it appears on your 2018 Federal Tax Return.
7. If the tool can locate tax information, click the option to "transfer now."
8. Electronically sign and submit the FAFSA corrections made verifying income. You must provide your FSA ID to sign electronically.
9. 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 your spouse, if applicable, 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 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 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"**

Non-tax filers 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, attesting that you and your spouse, if applicable, 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. You 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."