



2022-2023 Student Request for Income Change Review Form

| Last Name | First Name | MI | Palomar ID Number | Date of Birth |
|-----------|------------|----|-------------------|---------------|
|-----------|------------|----|-------------------|---------------|

The Financial Aid Office **may** be able to adjust data items used to calculate your expected family contribution (EFC) and your financial need if special circumstances exist that affect your ability to contribute towards the cost of education. This determination will be made on 2022 Income/Resources. Examples of special circumstances include:

- Emergency medical and dental expenses;
- Unforeseen & emergency related expenses that occur beyond your control;
- Unforeseen reduction in income or benefits.

If your family situation involves a special circumstance such as those described above, you may request for a review of your financial need status. Please note that the decision made by the financial aid office is final & may not be appealed to the Department of Education.

Submit the following Required information with this form –

- ◇ Please submit the attached 2022-2023 V-1 Independent Verification Worksheet; complete all sections of Group VI and a copy of your (and your spouse's, if married) 2020 IRS Tax Transcript/Tax Return.
- ◇ If you are submitting your request after March 1, 2023, you (and your spouse's, if married) will be required to also provide a copy of your 2022 IRS Tax Return & all 2022 income & W-2's etc.

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

- ◇ 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 2022 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 for 2022.

Separation/Divorce

Which occurred after the 2022-2023 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 2020.

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 2020 and is a one-time occurrence. Also indicate how this one-time income has been allocated.

Military Discharge

- ◇ Copy of DD Form 214, Member 4 copy **AND** Last LES

Last Name

First Name

MI

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PERSONAL STATEMENT OF EXPLANATION

Please explain your special circumstances. Tell us why your situation calls for a change to your financial need status. Be sure to include any documentation you have to support your statements. *(If you need additional space, use the back of this form.)*

I and/or my spouse have been receiving unemployment benefits as a result of COVID-19 pandemic

Yes

No

I and/or my spouse's Unemployment benefits has or will be terminated on _____
Month Year

Significant and/or Recurring Medical, Dental, or Nursing Home Expenses Not Covered by Insurance

- ◇ Explanation of why these expenses are not covered by insurance
- ◇ If the 2020 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.

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 2022-2023 FAFSA. Please note that additional documentation may be requested.

- ◇ Supporting documentation.

EARNED income & PROJECTED income for 2022

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

| Student's (and Spouse's, if married) EARNED Income Sources <i>Gross Annual</i> | January 2022 —December 2022 | | Student | Spouse |
|--|-----------------------------|-----------|---------|--------|
| | Start Date: | End Date: | | |
| Wages/Income from Work | | | \$ | \$ |
| Standard Unemployment Compensation | | | \$ | \$ |
| COVID-19 Unemployment Comp | | | \$ | \$ |
| Disability Income/Worker's Comp | | | \$ | \$ |
| Other Income. Source: | | | \$ | \$ |

| Student's (and Spouse's, if married) PROJECTED Income Sources <i>Gross Annual</i> | January 2022—December 2022 | | Student | Spouse |
|---|----------------------------|-----------|---------|--------|
| | Start Date: | End Date: | | |
| Wages/Income from Work | | | \$ | \$ |
| Standard Unemployment Compensation | | | \$ | \$ |
| COVID-19 Unemployment Comp | | | \$ | \$ |
| Disability Income/Worker's Comp | | | \$ | \$ |
| Other Income. Source: | | | \$ | \$ |

B. Certification

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.

Student Signature

Date

Spouse Signature (optional)

Date

Financial Aid Office Use Only:

| | | | | | |
|--------------------------|----------|--------------------------|--------|-----------------------------|--|
| <input type="checkbox"/> | Approved | <input type="checkbox"/> | Denied | Reviewer Signature and Date | |
|--------------------------|----------|--------------------------|--------|-----------------------------|--|



Financial Aid, Veterans & Scholarship Services
2022-2023 V-1 Verification Worksheet – Independent

For Office Use Only

The U.S. Department of Education and/or Palomar College selected your application for review in a process called “Verification.” In this process, we are required by law to compare information from your FAFSA with the information provided on this form and all requested financial documentation. Corrections may be deemed necessary. ***We cannot process your financial aid until verification has been completed. Please provide the required documents as soon as possible and read all instructions carefully before completing this worksheet to avoid delaying your financial aid awards.***

Last Name

First Name

MI

Palomar ID Number

INSTRUCTIONS:

Step 1: Collect and attach **ALL** required documentation (see “Required Documentation” below).

Step 2: Complete and sign the form.

Step 3: Make **PHOTOCOPIES** of required documents and submit in person to the Palomar College Financial Aid Office **-or-** scan and email to us from your **Palomar Student Email Account** to finaid@palomar.edu

REQUIRED DOCUMENTATION

STUDENT/SPOUSE DOCUMENTATION REQUIRED

A. If you or your spouse (if any) FILED taxes for 2020 (or were required to file taxes), please attach:

- A **PHOTOCOPY** of the 2020 Tax Return Transcript (*a document issued by the IRS*).

We will also accept a signed copy of your 2020 Federal Income Tax Return submitted to the IRS in lieu of a tax transcript

- ◊ To order a 2020 Tax Return Transcript online: <http://www.irs.gov/individuals/Get-Transcript>.
- ◊ To order a 2020 Tax Return Transcript by phone: 1-800-908-9946.
- ◊ If you used the IRS Data Retrieval Tool (*transfers tax data to your FAFSA*) successfully when completing your FAFSA online, we **DO NOT** need your or your spouse’s (if any) tax transcripts.

----- **OR** -----

B. Non-Filers:

- If you or your spouse (if any) worked in 2020, but **DID NOT** file taxes, attach a **PHOTOCOPY** of **ALL** 2020 W-2 and/ or 1099 forms or IRS Wage and Income Transcript for the person that worked, but did not file taxes.
- Request the “Verification of Non-filing Letter” from the IRS <http://www.irs.gov/individuals/Get-Transcript> or by phone 1-800-908-9946.

Family Information

List all of the people in your household in the table below. Include:

- Yourself;
- Your spouse (if any);
- Your children if you will provide more than half of their support from July 1, 2022 through June 30, 2023, or if the children would be required to provide parental information if they were completing a FAFSA for 2022-2023. Include children who meet either of these criteria, even if they do not live with you; **AND**
- Other people if they currently live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2022 through June 30, 2023.

| Full Name | Age | Relationship | If this person will be attending college at least half-time from July 1, 2022 to June 30, 2023, please write the name of the college here. |
|-----------|-----|---------------|--|
| | | <i>Myself</i> | <i>Palomar College</i> |
| | | | |
| | | | |
| | | | |
| | | | |

*If you need more space, attach a separate page with your name and Student ID Number at the top.

Income Information

| <u>STUDENT INCOME</u> | <u>SPOUSE INCOME (if any)</u> |
|---|---|
| 1a. Did you earn any income from employment in 2020? <input type="checkbox"/> YES <input type="checkbox"/> NO | 1b. Did your Spouse (if any) earn any income from employment in 2020? <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 2a. Were you required to file a US tax return for 2020? <input type="checkbox"/> YES. See section A for instructions on Page 1. <input type="checkbox"/> NO. See section B for instructions on Page 1. | 2b. Was your Spouse (if any) required to file a US tax return for 2020? <input type="checkbox"/> YES. See section A for instructions on Page 1. <input type="checkbox"/> NO. See section B for instructions on Page 1. |
| 3. Did you or your spouse (if any) earn any income from employment in a foreign country in 2020 and either did not file a foreign tax return or filed a foreign tax return? <input type="checkbox"/> YES, and did not file a foreign tax return. Indicate amount earned, translated into US dollars, and country earned in: \$ _____ in _____. <input type="checkbox"/> YES, and filed a foreign tax return. You MUST submit a PHOTOCOPY of your or your spouse's (if any) foreign tax return AND the Palomar Foreign Income Conversion Form (found at https://www2.palomar.edu/pages/fa/forms/). Convert all figures to US dollars, using the exchange rate in effect on the day you completed your FAFSA. <input type="checkbox"/> NO, my spouse (if any) or I did not earn any income from employment in a foreign country. | |
| 4. Did you or our spouse file a Schedule 1 on your 2020 tax return? <input type="checkbox"/> YES <input type="checkbox"/> NO | 5. Are you or our spouse a Dislocated Worker? <input type="checkbox"/> YES <input type="checkbox"/> NO |

Certification

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 _____

Submit via email to the Palomar College Financial Aid Office. Please scan and email to us from your Palomar Student Email

Account to finaid@palomar.edu