

**2023-2024 Student Request for Income Change Review Form****FAFSA or CADAA**

Last Name	First Name	MI	Palomar ID Number	Date of Birth
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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 based on 2023 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.

Section A: Reasons for Review (select from below)

Situation	Requested Documentation
<input type="checkbox"/> Significant Reduction of Income in 2023 due to a loss of job, change of job, reduction in pay, disability, or retirement.	<ul style="list-style-type: none"> • 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 2023 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 2023.
<input type="checkbox"/> Separation/Divorce which occurred after the 2023-2024 FAFSA was completed.	<ul style="list-style-type: none"> • 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.
<input type="checkbox"/> One-Time Income received in 2021.	<ul style="list-style-type: none"> • A signed statement indicating the type and amount of income that was received in 2021 and is a one-time occurrence. Also indicate how this one-time income has been allocated. <p><i>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.</i></p>
<input type="checkbox"/> Military Discharge	<ul style="list-style-type: none"> • Copy of DD Form 214, Member 4 copy AND Last LES
<input type="checkbox"/> Significant and/or Recurring Medical, Dental, or Nursing Home Expenses Not Covered by Insurance	<ul style="list-style-type: none"> • A signed statement explaining of why these expenses are not covered by insurance • If the 2021 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.
<input type="checkbox"/> Other Special Circumstances	<ul style="list-style-type: none"> • A signed statement explaining special circumstance to be considered. • Supporting documentation verifying the circumstances described.

In addition to requested documentation listed above, ALL students requesting an Income Change Review must also submit:

- 2023-2024 V-1 Independent Verification Worksheet
- Copy of your (and your spouse's, if married) **2021** IRS Tax Transcript or **signed** 1040 Tax Return.
- Requests submitted **after March 1, 2024**, also require a copy of your 2023 IRS Tax return & all 2023 income & W2's etc.



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Section B: 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.)*

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Section C: Earned/Projected income for 2023

Please complete the table below to help us assess your actual income for 2023. Report all income you expect to receive through December 31, 2023, in the appropriate boxes. You must include documentation supporting all 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>Gross Annual</i>	Actual <i>01/01/2023 to Today</i>	Estimated <i>Today to 12/31/2023</i>	Totals <i>Actual + Estimated</i>
Student’s Wages/Income from Work	\$	\$	\$
Spouse’s Wages/Income from work (if married)	\$	\$	\$
Unemployment Compensation	\$	\$	\$
Disability Income/Worker’s Comp	\$	\$	\$
Other Income List Source: _____	\$	\$	\$

Section D: Dislocated Worker

Are you or your spouse (if married) a dislocated worker?

Dislocated worker definition: has been laid off or received a lay-off notice from a job; was self-employed but is now unemployed due to economic conditions or natural disaster; or is a displaced homemaker. (e.g., a stay-at-home mom or dad, no longer supported by spouse), is unemployed or underemployed, and is having trouble finding or upgrading employment.

Yes

No

Section E: 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

*****FOR OFFICE USE ONLY*****

Approved Denied Date: _____ Reviewer Signature: _____



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.***

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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 2021 (or were required to file taxes), please attach:

- A **PHOTOCOPY** of the 2021 Tax Return Transcript (*a document issued by the IRS*).

We will also accept a signed copy of your 2021 Federal Income Tax Return submitted to the IRS in lieu of a tax transcript

- ◊ To order a 2021 Tax Return Transcript online: <http://www.irs.gov/individuals/Get-Transcript>.
- ◊ To order a 2021 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 2021, but **DID NOT** file taxes, attach a **PHOTOCOPY** of **ALL** 2021 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, 2023 through June 30, 2024, or if the children would be required to provide parental information if they were completing a FAFSA for 2023-2024. 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, 2023 through June 30, 2024.

Full Name	Age	Relationship	If this person will be attending college at least half-time from July 1, 2023 to June 30, 2024, 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 2021? <input type="checkbox"/> YES <input type="checkbox"/> NO	1b. Did your Spouse (if any) earn any income from employment in 2021? <input type="checkbox"/> YES <input type="checkbox"/> NO
2a. Were you required to file a US tax return for 2021? <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 2021? <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 2021 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 your spouse file a Schedule 1 on your 2021 tax return? <input type="checkbox"/> YES <input type="checkbox"/> NO	5. Are you or your spouse a Dislocated Worker? YES 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