



2024-2025 Income Review Appeal Form-Independent

Financial Aid Office • 1140 West Mission Road, San Marcos, CA 92069 • www.palomar.edu/fa/ • (760)744-1150 ext 2366

Purpose: The Financial Aid Office may be able to adjust data items used to calculate your Student Aid Index (SAI) 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 2024 Income/Resources. If your family situation involves a special circumstance such as those described in **Section B**, you may request for a review of your financial need status. Please note that the decision made by the financial aid office is final and may not be appealed to the Department of Education.

Requirements:

- You must have submitted the 2024-2025 FAFSA (<https://studentaid.gov>) or 2024-2025 CADAA (<https://dream.csac.ca.gov/>)
- You must have either received and **Award Letter** notification or **Loan Only** notification.
- Submit this form (Income Review Appeal Form) along with supporting documentation (see required documentation in **Section B**).
- If you did not utilize the IRS Data Retrieval Tool when completing the FAFSA, include a copy of the student's, spouse's (if married) 2022 Tax Transcripts (or a signed copy of the 2022 Federal Tax Return) and all W-2 forms.

Instructions: Submit ALL documentation to the Financial Aid Office promptly:

finaid@palomar.edu | Student Services Center 1140 West Mission Road San Marcos, CA 92069 or at any of our education centers ([Escondido](#), [Fallbrook](#), [Rancho Bernardo](#), [Camp Pendleton](#))

Note: documents received by email must be sent from Palomar College Student email account.

Section A: Student Information

Student's Name - Last, First, MI	Palomar ID Number

Section B: Special Circumstance

1. Date of Income Change: _____

2. Check the **ALL** the applicable reasons below and ensure you provide the corresponding documentation:

Circumstance	Required Documentation
<input type="checkbox"/> Significant Reduction of Income in 2024 (due to job loss, job change, pay reduction, disability, or retirement)	<ul style="list-style-type: none">• Copies of your (and your spouse's, if married) most recent paycheck stub(s) showing 2024 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 2024.
<input type="checkbox"/> Separation/Divorce (after 2024-25 FAFSA submission).	<ul style="list-style-type: none">• 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 2022	<ul style="list-style-type: none">• Specify on your statement the type and amount of the one-time income received in 2022 and is a one-time occurrence.• Proof of one-time income received. <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>
<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">• Schedule A from 2022 Federal Income Tax Return (if filed)• Billing statements from healthcare provider(s)• Proof of out-of-pocket payments (e.g., credit card statements, canceled checks, bank withdrawals)• Documentation of ongoing expenses not covered by insurance• Statement from attending physician or State Disability Office (for continuing expenses)
<input type="checkbox"/> Other Special Circumstances	<ul style="list-style-type: none">• Relevant supporting documentation that verifies the described circumstances.

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Section C: Student Statement

Please explain your special circumstances. Your statement should include: The reason(s) for the change in income or financial circumstances, the date(s) when the change(s) occurred. How your financial situation differs from what was reported on your 2024-2025 FAFSA or CADAA.

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Section D: Family Household Information

List ALL of the people in your household. Include the following:

- yourself (student);
- your spouse (if student is married);
- your children if you will provide more than half of their support from July 1, 2024 through June 30, 2025, or if the children would be required to provide parental information if they were completing a FAFSA for 2024-2025. Include children who meet either of these criteria, even if they do not live with you;
- 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, 2024 through June 30, 2025.

Full Name	Age	Relationship	If this person will be attending college at least half-time from July 1, 2024 to June 30, 2025, please write the name of the college here.
		<i>Myself</i>	<i>Palomar College</i>

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Student's Name - Last, First, MI	Palomar ID Number

Section E: 2022 Income Information

Student Income	Spouse Income-If Married (Leave Blank if not Married)
<input type="radio"/> I consented to the Future Act Direct Data Exchange to transfer 2022 IRS federal tax information (FTI) into the FAFSA, and the transfer was successful.	<input type="radio"/> Spouse consented to the Future Act Direct Data Exchange to transfer 2022 IRS federal tax information (FTI) into the FAFSA, and the transfer was successful.
<input type="radio"/> I consented to the Future Act Direct Data Exchange to transfer 2022 IRS federal tax information (FTI) into the FAFSA income tax information (FTI) into FAFSA, but the transfer was not successful. Please attach your 2022 IRS Tax Return Transcripts (see Section F: 2022 Verification Instructions page for more information).	<input type="radio"/> Spouse consented to the Future Act Direct Data Exchange to transfer 2022 IRS federal tax information (FTI) into the FAFSA income tax information (FTI) into FAFSA, but the transfer was not successful. Please attach your 2022 IRS Tax Return Transcripts (see Section F: 2022 Verification Instructions page for more information).
<input type="radio"/> I earned foreign income and filed a foreign tax return. Please attach a copy of your 2022 Foreign Tax Return AND the Palomar Foreign Income Conversion Form (form can be located at www.palomar.edu/fa/forms/).	<input type="radio"/> Spouse earned foreign income and filed a foreign tax return. Please attach a copy of spouse's 2022 Foreign Tax Return AND the Palomar Foreign Income Conversion Form (found at https://www2.palomar.edu/pages/fa/forms/).
<input type="radio"/> I earned foreign income but did NOT file foreign tax return. Indicate amount earned, converted into US dollars, and country earned in: \$ _____ in _____.	<input type="radio"/> Spouse earned foreign income but did NOT file foreign tax return. Indicate amount earned, converted into US dollars, and country earned in: \$ _____ in _____.
<input type="radio"/> I am not required to file and had no income earnings in 2022. Please attach your 2022 Verification of Non-Filing Letter (see Section F: 2022 Income Verification Instructions page for more information).	<input type="radio"/> Spouse is not required to file and had no income earnings in 2022. Please attach Spouse's 2022 Verification of Non-Filing Letter (see Section F 2022 Verification Instructions page for more information)..
<input type="radio"/> I am not required to file and I did not / will not file IRS federal income taxes for 2022, but had some earnings from work in 2022. Please attach your 2022 Verification of Non-Filing Letter and all W2s (see Section F: 2022 Income Verification Instructions page for more information).	<input type="radio"/> Spouse is not required to file and did not / will not file IRS federal income taxes for 2022, but had some earnings from work in 2022. Please attach spouse's 2022 Verification of Non-Filing Letter and all W2s (see Section F: 2022 Income Verification Instructions page for more information).

Section F: 2024 Income Information (Earned/Projected)

Please complete the table below to help us assess your actual income for 2024. Report all income you expect to receive through December 31, 2024, in the appropriate boxes. You must attach documentation of how you estimated your 2024 income and benefits. **Do not leave any item blank – if an item does not apply, write "N/A" or "0."**

Student's (and Spouse's, if married) Anticipated 2024 Calendar Year Income Sources	Actual Income 01/01/2024 to Present	Estimated Income Present to 12/31/2024	Total 2024 Income Actual + Estimated
Student's Wages/Income from Work	\$	\$	\$
Spouse's Wages/Income from work (if married)	\$	\$	\$
Other taxable income (severance pay, dividends, interest, pensions, annuities, alimony, unemployment compensation, early distributions from retirement, capital gains, rental/business income, etc.)	\$	\$	\$
Child support received for 2024	\$	\$	\$
Other income-List Source: _____	\$	\$	\$
Other income-List Source: _____	\$	\$	\$

- All amounts should reflect gross income (before taxes and deductions).
- Include only income earned or anticipated in the 2024 calendar year.

- "Actual Income" refers to income already earned in 2024.
- "Estimated Income" is the anticipated income for the remainder of 2024.
- "Total Projected Income" is the sum of actual and estimated income for the entire year of 2024.

Section H: 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
Ver 09/17/2024

Date

Section E: 2022 Income Verification Instructions

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Section E of the Income Review Appeal Form requires information from the student's (and spouse's if applicable) 2022 Federal Tax Return. Verification of the income reported is also required. Please refer to the information below to submit the appropriate verification of income required for 2022.

Tax Filers (Choose ONE of the following options)

- Consent to the use of the FUTURE Act Direct Data Exchange (FA-DDX) tool, previously known as the IRS Data Retrieval Tool.
- Request a 2022 IRS Tax Return Transcript from the IRS, or
- Submit a physically signed copy of your 2022 Federal 1040 Tax Return and Schedules 1, 2, and 3 (if applicable)

Non-Filers

- Non-Filers/2022 Earnings: Request a 2022 Verification of Non-Filing Letter from the IRS and submit copies of all W2s for 2022.
- Non-Filers/No Earnings in 2022: Request a 2022 Verification of Non-Filing Letter from the IRS.

Foreign Income

- Foreign Income Filer: Copy of your 2022 Foreign Tax Return AND the Palomar [Foreign Income Conversion Form](#)

Instructions for Using the FUTURE Act Direct Data Exchange Tool

Student:

- Access your FAFSA at www.studentaid.gov and log into your account.
- Click on the option to "Make FAFSA Corrections" to view your completed FAFSA information.
- Consent to have your Federal Tax Information (FTI) automatically obtained from the IRS and provided on your FAFSA application.
- If your 2022 Federal Taxes were filed and your information was retrieved, you do not need to manually provide FTI data. You can then select the first option in Section C.

Spouse:

- Access your contributor invite from your personal email and click 'Log In' to enter the contributor section of your spouse's FAFSA.
- Consent to have your Federal Tax Information (FTI) automatically obtained from the IRS and provided on your spouse's FAFSA application.
- If your 2022 Federal Taxes were filed and your information was retrieved, you do not need to manually provide FTI data. You can then select the first option in Section C.

Instructions for Requesting an IRS Tax Return Transcript

- Visit www.irs.gov and click "Get Your Tax Record."
- Choose either "Get Transcript Online" or "Get Transcript by Mail."
- To verify your identity with ID.me, provide a photo ID (driver's license, state ID, or passport) and take a selfie with a smartphone or webcam.
- Upon successful completion of the IRS's two-step authentication, the transcript will display online.
- Alternatively, request a transcript by calling (800) 908-9946 or by completing a 4506-T form to mail or fax to the IRS.
- Ensure you request the "IRS Tax Return Transcript" and NOT the "IRS Account Transcript."
- Transcripts requested via mail, phone, or 4506-T form are generally received within 10 business days of the IRS's receipt of your request.

Instructions for Requesting a Verification of Non-Filing Letter

- Visit www.irs.gov and click "Get Your Tax Record."
- Choose either "Get Transcript Online" or "Get Transcript by Mail."
- To verify your identity with ID.me, provide a photo ID (driver's license, state ID, or passport) and take a selfie with a smartphone or webcam.
- Upon successful completion of the IRS's two-step authentication, the letter will display online.
- Alternatively, request a Verification of Non-Filing Letter by completing a 4506-T form to mail or fax to the IRS.
- Verification of Non-Filing Letters requested via the 4506-T form are generally received within 10 business days of the IRS's receipt of your request.