Office of Student Financial Services
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DEPENDENT
REQUEST FOR REVIEW
REDUCTION IN FAMILY INCOME
2011-2012 ACADEMIC YEAR

Please Note: You must file a 2012-2013 Free Application for Federal Student Aid (FAFSA) and receive an award letter before submitting this form.

STUDENT'S NAME: _____ID#_____

You have notified this office that you and/or your parent(s) have special circumstances, which have resulted in a reduction in resources for calendar year 2012 and will affect your ability to contribute toward your educational expenses.

The office will only consider reductions in income for the circumstances listed in Section I of this form. It is our policy **not to consider** a reduction in income for the following:

- Voluntary termination of employment.
- Unusual expenses related to personal living (e.g. wedding expenses, credit card bills, home mortgage or school loan payments, car payments, legal expenses, other miscellaneous consumer item expenses).
- Families with reductions processed in 2011-2012 who grossly underestimated 2011 income.
- One year bonus incomes such as lottery or gambling winnings.
- Reductions in overtime pay (this will be reflected on the following year's aid applications).
- Reductions in income resulting from bankruptcy proceedings.
- Medical expenses other than those claimed as a deduction on your 2011 federal tax returns.

If the reason you are requesting a review is listed above, do not complete this form.
If you are uncertain whether or not your situation can be considered for a review, please contact our office at (517) 264-7130.

Student's Name_____ID#_____

SECTION I: DO YOU MEET ANY OF THESE CRITERIA?

To determine if any adjustments can be made to your financial aid file, please complete the appropriate sections below.

A.____ Since you completed the 2012-13 FAFSA, your parent has lost employment because of termination, layoff, disability, retirement, company closing, plant shutdown.
Last date of employment ___/___/___ Date expected to return to work ___/___/___

Documentation Required:

- Copy of most recent pay stub
- Copy of 2011 federal tax transcript (see appendix 1)
- Notice of termination of employment
- Copy of disability award
- Proof of Unemployment benefits

B.____ Since you completed the 2012-13 FAFSA, your parent has lost some type of untaxed income or benefits. Untaxed income includes: worker's compensation, child support, pensions and annuities, social security benefits.

Name of person losing benefit _____
Relationship to student _____
Type of benefit _____ Date lost ___/___/___

Documentation Required:

- Documentation supporting termination of benefits.

C.____ Since you completed the 2012-13 FAFSA, your parents have divorced or separated.

Date of separation/divorce ___/___/___

D.____ Your parent is now deceased, but his/her information was reported on the FAFSA.
Date deceased ____/____/____

E.____ You/your parents have incurred excessive medical expenses in 2012 due to the illness of a family member. **These expenses must be documented on your 2011 federal income tax return Schedule A.**

Documentation Required:

- 2011 federal tax transcript (see appendix 1)

F.____ Other: Your family circumstances are not reflected above or on the previous page.
Please attach a **detailed** statement regarding your circumstances and provide supporting documentation.

Complete Section II

SECTION II

Please provide anticipated income for the entire calendar year 2012. **Do not put hourly wage rates but instead compute what will be earned for the year**. List income that was received from January 1, 2012, until now in the first column and estimate the amounts to be received from now until December 31, 2012, in the second column. Then total the first and second columns.

INCOME FOR JANUARY 1, 2012, TO DECEMBER 31, 2012
Parent Information for Dependent Students

	Actual 01-01-12 to Today Date__/__/__	**Estimated** Today to 12-31-12 Date__/__/__	**Total** (Actual + Estimated Columns)
Student's income from work			
Father's income from work			
Mother's income from work			
Taxable interest income			
Taxable pensions/annuities			
Alimony/Spousal Support			
Unemployment compensation			
Welfare/FIA/AFDC			
Untaxed pensions/annuities			
Worker's compensation			
Child Support received			
IRA/401(k)/403(b) contributions			
Untaxed interest income			
Other_____			
Other_____			
Office Use Only			

Documentation, such as letters from employers, doctors, State Unemployment Office, pay stubs etc., which supports the basis of your family's appeal, must be submitted. DO NOT LEAVE ANY BLANKS. PLEASE ENTER ZERO IF THE AMOUNT IS ZERO. If you do not submit documentation or leave sections of this form blank, the form will be returned as incomplete.

Student's Signature_____ Date_____

Spouse's Signature_____ Date_____

Office Use Only:

_____ Approved ____Denied FA Signature:_____

Date:_____Notes:_____
_____
_____

2012–2013 Verification Worksheet
Dependent Student

Your 2012–2013 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Information

Student's Last Name _____ Student's First Name _____ Student's M.I. _____ Student's Social Security Number _____

Student's Street Address (include apt. no.) _____ Student's Date of Birth _____

City _____ State _____ Zip Code _____ Student's Email Address _____

Student's Home Phone Number (include area code) _____ Student's Alternate or Cell Phone Number _____

B. Dependent Student's Family Information

List below the people in your parent(s)' household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2012, through June 30, 2013, or if the other children would be required to provide parental information if they were completing a FAFSA for 2012–2013. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2013.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2012, and June 30, 2013. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
Missy Jones (example)	*18*	*Sister*	*Central University*	*Yes*
		Self		

Student's Name: _____ **SSN:** _____

C. Dependent Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2011 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student, filed or will file a 2011 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2011 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*

☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2011 IRS income information into the student's FAFSA once the student has filed a 2011 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*

☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2011 IRS tax return transcript—**not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*

☐ *Check here if the student's IRS tax return transcript is attached to this worksheet.*

☐ *Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.*

2. TAX RETURN NONFILERS—Complete this section if the student, will not file and is not required to file a 2011 income tax return with the IRS.

Check the box that applies:

☐ The student was not employed and had no income earned from work in 2011.

☐ The student was employed in 2011 and has listed below the names of all the student's employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2011 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*$2,000.00(example)*	*Yes(example)*

Student's Name: _____ **SSN:** _____

D. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—**Important Note:** If the student's parent(s), filed or will file, an amended 2011 IRS tax return the student's financial aid administrator must be contacted before completing this section.

   Instructions: Complete this section if the student's parent(s) filed or will file a 2011 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2011 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.*

   Check the box that applies:

   ☐ The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2011 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*

   ☐ The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2011 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*

   ☐ The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2011 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript go to www.IRS.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2011 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2011 tax returns were filed, 2011 IRS tax return transcripts must be submitted for each parent.*

   ☐ *Check here if an IRS tax return transcript(s) is attached to this worksheet.*

   ☐ *Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.*

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and is not required to file a 2011 income tax return with the IRS.

   Check the box that applies:

   ☐ The parent(s) was not employed and had no income earned from work in 2011.

   ☐ The parent(s) was employed in 2011 and has listed below the names of all the parent's employers, the amount earned from each employer in 2011, and whether an IRS W-2 form is attached. Attach copies of all 2011 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2011 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	*$2,000.00* (example)	*Yes* (example)

Student's Name: _____ **SSN:** _____

E. Parent's Other Information to Be Verified

1. Complete this section if someone in the student's parent's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2010 or 2011 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2010 or 2011. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2010 and/or 2011.

2. Complete this section if one of the student's parents paid child support in 2011.

☐ One (or both) of the student's parents listed in Section B of this worksheet paid child support in 2011. The parent has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2011 for each child. If asked by the school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2011
Marty Jones	*Chris Smith (example)*	*Terry Jones*	*$6,000.00*

F. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.
The student and one parent must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

_____ _____
Student's Signature Date

_____ _____
Parent's Signature Date

Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.

You should make a copy of this worksheet for your records.

Appendix 1

IRS Tax Return Transcript Request Process

Tax filers can request a transcript, free of charge, of their 2011 tax return from the IRS in one of three ways.

Online Request

- Available on the IRS Web site at www.irs.gov
- In the **Online Services** section of the homepage click "Order a Tax Return or Account Transcript"
- Click "Order a Transcript"
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Click "Continue"
- In the **Type of Transcript** field, select "Return Transcript" and in the **Tax Year** field, select "2011".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Telephone Request

- Available from the IRS by calling 1-800-908-9946
- Tax filers must follow prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Select "**Option 2"** to request an IRS Tax Return Transcript and then enter "**2011**".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.

- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the US Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS.

  Institutions are responsible for notifying aid applicants whether to list the institution as the third party to receive the Transcript or not. Some institutions may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the two names may be different.
- On line 6, enter "2011" to receive IRS tax information for the 2011 tax year that is required for the 2012-2013 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.