FINANCIAL AID OFFICE

2013-2014 REQUEST FOR REVIEW OF **AWARD YEAR** INCOME DATA

Dependent Student

Special Circumstances

IMPORTANT

Federal regulations require all applicants to report calendar year 2012 income figures on their 2013-2014 Free Application for Federal Student Aid (FAFSA). Federal regulations also allow the Financial Aid Office to revise the information on your financial aid application for award year 2013-2014, if documented special circumstances exist. Examples of special circumstances include: loss of student's or parents' income due to lay-off or termination of employment, separation, divorce, or other mitigating circumstances beyond your or your parents' control.

By following the instructions below you may request a review of income data. If your request is granted, the Financial Aid Office will change the income information originally reported on your FAFSA to reflect your and your parents' income for the 2013-2014 award year. All requests will be reviewed by a Financial Aid Advisor. Not all requests are granted. Requests are approved or denied based on the information provided.

Required Documentation

In order for a Financial Aid Advisor to review your request, you must provide documentation of your special circumstances and submit **ALL** of the following forms. **Do not leave any question blank.**

- ☑ Parents' 2012 IRS Transcript of Tax Return
- ☑ Student's 2012 IRS Transcript of Tax Return

(only required if IRS Data Retrieval was not used, see attached instructions)

- ☑ Parents' 2012 W-2's
- ☑ Student's 2012 W-2's
- ☑ Parents' 2013 IRS Transcript of Tax Return
- ☑ Student's 2013 IRS Transcript of Tax Return

(if appeal is submitted after April 15, 2014)

- ☑ Parents' 2013 W-2's
- ☑ Student's 2013 W-2's

(if appeal is submitted after January 31, 2014)

- ☑ 2013-2014 Personal Statement of Explanation
- ☑ 2013-2014 Statement of Information
- ☑ 2013-2014 Parents' Projected Award Year Income Statement
- ☑ 2013-2014 Student's Projected Award Year Income Statement
- ☑ Parents' Statement of Projected Basic Living Expenses

(included in this packet)

You must also provide supporting documentation of your special circumstances. Examples of acceptable documentation are listed below. Requests submitted without supporting documentation may be delayed or denied until the documentation is received.

- ☞ Copies of current or final pay stubs, benefit checks or employer statements for each job
- ☞ Copy of termination notice or letter from employer confirming termination date
- ☞ Unemployment Award Letter and the most recent Unemployment check stub
- ☞ Proof of parents' separation or divorce, if applicable
- ☞ Any other documentation that supports your request for review

SUBMIT ALL FORMS AND DOCUMENTS TO THE FINANCIAL AID OFFICE

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013-2014 PERSONAL STATEMENT OF EXPLANATION

Dependent Student

Please explain, in detail, your special circumstances and why you are requesting a Financial Aid Advisor to change your and/or your parents' 2013-2014 FAFSA income information. Incomplete explanations may cause delay or denial of your request. (If you need additional space, continue on the back of this form).

Print or Type: _____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

CERTIFICATION: I certify that all information on this form is true, complete, and accurate. Upon request, I agree to provide proof of the information reported on this form. False statements or misrepresentation can be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted. ***I understand that I must report changes of the above information to the Financial Aid Office***.

Student's Signature _____ Date _____

FAO: ☐ Appeal **APPROVED** ☐ Appeal **DENIED** Date _____ FAO Initial _____

Prior EFC: _____ Trans #: _____ New EFC: _____ Trans #: _____

Reason: _____

_____

_____

_____

_____

_____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013-2014 STATEMENT OF INFORMATION

Dependent Student

Complete all questions in applicable sections only. If your or your parents' income information did not change leave that section blank.

STUDENT'S SECTION

1. Did you voluntarily quit or reduce your hours at work? ☐ YES ☐ NO

If YES, please explain why: _____

When did you quit or reduce your hours? (month/year) _____

If you are still working, how many hours per week? _____

2. Were you laid-off or terminated from your job? ☐ YES ☐ NO

If YES, when were you were laid-off or terminated? (month/year) _____

3. Have Unemployment Benefits been applied for? ☐ YES ☐ NO

If YES, when will (did) the Unemployment Benefits start? (month/year) _____

PARENTS' SECTION

1. Did either of your parents voluntarily quit or reduce their hours at work? ☐ YES ☐ NO

If YES, please explain why: _____

When did they quit or reduce their hours? (month/year) _____

If they are still working, how many hours per week? _____

2. Were they laid-off or terminated from their job? ☐ YES ☐ NO

If YES, when were they were laid-off or terminated? (month/year) _____

3. Are your parents married? ☐ YES ☐ NO

If NO, give date of separation or divorce. (month/year) _____

4. Does your parent receive child support? ☐ YES ☐ NO

5. Have Unemployment Benefits been applied for? ☐ YES ☐ NO

If YES, when will (did) the Unemployment Benefits start? (month/year) _____

CERTIFICATION: I certify that all information on this form is true, complete, and accurate. Upon request, I agree to provide proof of the information reported on this form. False statements or misrepresentation can be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted. ***I understand that I must report changes of the above information to the Financial Aid Office.***

Student's Signature _____ Date _____ Parent's Signature _____ Date _____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013-2014 PARENTS' PROJECTED AWARD YEAR INCOME STATEMENT

Dependent Student

Do not leave any section blank. If any part of this form is left blank it will not be accepted. If your parents list "0" income for any month, provide an explanation on the back of this form or a separate sheet of how their expenses listed on the Statement of Projected Basic Living Expenses form will be paid. Failure to include this explanation may cause delay or denial of your request. LIST GROSS INCOME FIGURES. **Gross income** is earnings before taxes and other deductions are subtracted.

* **Taxable income** is any income that is reported to the IRS. Unemployment Benefits are taxable income.

** **Untaxed income** includes earnings from work paid by cash or check ***not*** being reported to the IRS, child support, TANF/CalWorks, General Relief, Social Security (or any other retirement benefits), and cash received from friends or relatives used to pay living expenses.

Mother / Stepmother's 2013-2014 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
July 2013			
Aug. 2013			
Sept. 2013			
Oct. 2013			
Nov. 2013			
Dec. 2013			
Jan. 2014			
Feb. 2014			
March 2014			
April 2014			
May 2014			
June 2014			
Income Totals			

Father / Stepfather's 2013-2014 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
July 2013			
Aug. 2013			
Sept. 2013			
Oct. 2013			
Nov. 2013			
Dec. 2013			
Jan. 2014			
Feb. 2014			
March 2014			
April 2014			
May 2014			
June 2014			
Income Totals			

CERTIFICATION: I certify that all information reported on this form is true, complete, and accurate to the best of my knowledge. I agree to provide proof of the information that I have reported on this form. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted. ***I understand that I must report changes of the above figures to the Financial Aid Office.***

Student's Signature _____ Date _____ Parent's Signature _____ Date _____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

2013-2014 STUDENT'S PROJECTED AWARD YEAR INCOME STATEMENT

Dependent Student

Do not leave any section blank. If any part of this form is left blank it will not be accepted. LIST GROSS INCOME FIGURES. **Gross income** is earnings before taxes and other deductions are subtracted. If you do not live with your parents, explain how your living expenses are met on the back of this form or a separate sheet.

* **Taxable income** is any income that is reported to the IRS. Unemployment Benefits are taxable income.

** **Untaxed income** includes earnings from work paid by cash or check *not* being reported to the IRS, General Relief, Refugee Cash Assistance, Social Security (or any other cash benefits), and cash received from friends or relatives used to pay living expenses.

Student's 2013-2014 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
July 2013			
Aug. 2013			
Sept. 2013			
Oct. 2013			
Nov. 2013			
Dec. 2013			
Jan. 2014			
Feb. 2014			
March 2014			
April 2014			
May 2014			
June 2014			
Income Totals			

CERTIFICATION: I certify that all information reported on this form is true, complete, and accurate to the best of my knowledge. I agree to provide proof of the information that I have reported on this form. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted. ***I understand that I must report changes of the above figures to the Financial Aid Office.***

Student's Signature _____ Date _____ Parent's Signature _____ Date _____

Student's Name _____ GCC ID# _____

FINANCIAL AID OFFICE

PARENTS' STATEMENT OF PROJECTED BASIC LIVING EXPENSES
July 2013 - June 2014

INSTRUCTIONS: Have your parents complete the information below by listing expenses that they will pay between July 1, 2013 and June 30, 2014. If amounts differed from month to month, provide an average for the 12-month period. Do not include any expenses covered by food stamps or housing assistance. If an expense is not applicable (i.e., car payments), put a "0". **Do not leave any question blank.**

	Amount per **MONTH** (Do not leave any amount blank)
1. Rent or Mortgage (include principal, interest and taxes)	$ _____
2. Utilities (gas, electric, water, telephone, cell phone etc.)	$ _____
3. Food (at home and away from home)	$ _____
4. Car Payment(s)	$ _____
5. Transportation (gas, oil, repairs and/or maintenance, bus passes)	$ _____
6. Elementary/Secondary Tuition or Child Care Paid	$ _____
7. Car Insurance expenses	$ _____
8. Medical/dental expenses paid but NOT covered by insurance	$ _____
9. Child Support Paid (due to divorce or separation)	$ _____
10. Expenses for clothing, entertainment, gifts & travel	$ _____
11. Other Expenses: _____	$ _____

Do your parents receive Food Stamps/SNAP? ☐ YES ☐ NO

Do your parents receive housing subsidies? ☐ YES ☐ NO

CERTIFICATION: I certify that all information reported on this form is true, complete, and accurate to the best of my knowledge. I agree to provide proof of the information that I have reported on this form. False statements or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. I give permission to the Financial Aid Office to make corrections/adjustments to data on my FAFSA based on forms and/or documents submitted.

Student's Signature _____ Date _____ Parent's Signature _____ Date _____

FOR FINANCIAL AID OFFICE USE ONLY

Total Monthly Expenses _____ Total Annual Expenses (12 mo.) _____

Total Student's Income _____ Total Parent's Income _____ Total All Income _____

FINANCIAL AID OFFICE

IRS Request for Transcript of Tax Return

If you or your parents filed federal tax returns with the IRS, you may be eligible to use the IRS Data Retrieval Tool*, which is the best and easiest way to provide accurate tax information. With just a few simple steps you can view information from your or your parents' 2012 IRS tax return and transfer that information directly into your 2013-2014 FAFSA (fafsa.gov). If you transfer the data from the IRS to your FAFSA (and the information remains unchanged), you will not be required to provide transcripts of tax returns for 2012. This option is only available for married parents if they filed a joint tax return.

**The IRS Data Retrieval Tool option is currently not available for students who completed the CA Dream Application. You must provide a copy of the 2012 Transcript of Tax Return from the IRS*.

An IRS Transcript of Tax Return for 2013 federal tax returns is required if this appeal is submitted after April 15, 2014.

A separate Transcript of Tax Return is needed for each tax return filed

A Transcript of Tax Return from the IRS shows most line items from your federal tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes you, your representative or the IRS made after the return was filed. **If your parents are married but filed separate federal tax returns, we need a tax transcript for each parent.** If you and/or your parents are not eligible or choose not to use the IRS Data Retrieval Tool you have several options for providing this information.

- Obtain a transcript online at IRS.gov. Click on "Get Transcript for My Tax Records" and then click on "Get Transcript ONLINE". Provide the required information to create an account and then click on "**2012**" under "**Return Transcript**". Bring in a printout of the transcript once it is displayed on your screen.

  Online requests can also be processed if you want the transcript mailed to you. Click on "Get Transcript for My Tax Records" and then click on "Get Transcript by MAIL". Provide the required information and select "Return Transcript" for Type of Transcript and "2012" for Tax Year. The transcript will be sent to the address on file with the IRS, and you should allow 5-10 days to receive it. Online requests cannot be processed if you need the transcript mailed to an address other than the one the IRS has on file for you.

OR

- Fill out the Short Form Request for Individual Tax Return Transcripts (Form 4506T-EZ). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506tez.pdf and complete the form. For question #6 enter "2012". Be sure the taxpayer signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**If you filed an individual return and lived in**" on page 2 of the 4506T-EZ or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- If you need information from other IRS forms, such as Form W-2 or Form 1099, you can use the Request for Transcript of Tax Return (Form 4506-T). Go to the IRS website at http://www.irs.gov/pub/irs-pdf/f4506t.pdf and complete the form. For question #9 you should enter "2012". Be sure the taxpayer signs the bottom of the page where it says "Sign Here". The form must be printed and mailed to the appropriate IRS address found under "**Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1010)**" on page 2 of the 4506-T or it can be faxed to **(559) 456-5876**. You can expect your transcript to be sent within 5 to 10 days from the time the IRS receives your signed request.

OR

- Call the IRS at **(800) 908-9946** and order a Transcript of Tax Return for 2012.