Student Financial Aid
1845 Loop Drive
Bowling Green, KY 42101
Telephone: (270) 901-1000
Fax: (270) 901-1144
www.southcentral.kctcs.edu

Special Circumstances Request Adjustment to Household Income 2014-2015

This application is to request a review of special circumstances that may change your financial aid eligibility. The Financial Aid Office requires documentation to support your (and your spouse or parents, if applicable) claim for special circumstances.

The Financial Aid Office begins the review process by evaluating the accuracy of the information you submitted on your Free Application for Federal Student Aid (FAFSA). The Financial Aid Office will evaluate the documents you submit along with your FAFSA information to determine if you are eligible for any financial aid adjustments.

If recalculation results in increased eligibility, it will be resubmitted for official FAFSA processing.

The decision reached by the Financial Aid Office is final and cannot be appealed to the U.S. Department of Education.

Please put your **Student ID** number on **all** forms submitted to the Financial Aid Office.

Student ID Number _____

Print Last Name _____ **First** _____ **MI** _____

Print Street Address _____

Print City _____ **State** _____ **Zip** _____

Telephone Number _____

I am requesting recalculation for the school year beginning _____.

Instructions for Completion

- **Complete only the sections that apply to you and provide all required documentation.**
- **Provide all requested signatures. Write your name and student ID number at the top of all documents.**
- **If additional information is required, you will be notified promptly. Failure to comply will result in denial of request.**
- **Incomplete applications will not be reviewed.**
- **Allow 2-4 weeks for your request to be processed by the Financial Aid Office.**

To assure an accurate adjustment due to recent unemployment, please do not submit this application before June 1.

Certification Statements and Signatures

I swear under penalty of perjury that all of the information contained in this application is true to the best of my knowledge. I understand that providing false or misleading information in an attempt to obtain federal financial aid can result in a fine of up to $10,000 and/or incarceration. **I understand that failure to provide the required documentation may result in denial of this application.**

Student's Signature: _____ **Date:** _____

Parent's Signature: _____ **Date:** _____

(If you are a dependent student, one parent must sign the form.)

PART I: Verification of FAFSA data

☐ Submit a completed and signed **V1 Standard Verification Worksheet**.

☐ Submit verification of financial Information (see instructions on V1 Standard Verification Worksheet) for yourself, spouse and/or parents if their information was required on the FAFSA. If a joint return was filed but taxpayers are now separated, include all W-2s.

☐ I have already submitted my Verification documents for this school year.

PART II: Criteria for Special Circumstance Request (mark each box that corresponds to you)

SITUATION	ADDITIONAL DOCUMENTATION REQUIRED
☐ Loss of Employment Income for Student, Spouse or Parent (must occur 8 weeks prior to request, result of layoff, reduction in pay on present job or new job at reduced rate of pay, etc.)	-Letter of separation from employer including last day -Copy of final pay stub from previous job -Copy of most recent pay stub from current job(s) -Copy of unemployment benefits, UI check stub or statement of ineligibility for unemployment benefits -Copy of spouse most recent pay stub(s)
☐ Loss of other income	-Statement of benefits (Social Security, SSI, etc.) -Letter from parent or court indicating Child Support stopped including amounts paid YTD -Other applicable documentation to verify loss of other income
☐ Excessive medical expenses not covered by insurance (medical, dental, etc.)	-Copy of Schedule A from Federal Tax Return -Receipts indicating amounts that have been paid for medical expenses (not billed, but paid)
☐ Excessive non-voluntary expenses out of proportion to income (housing, utilities, transportation, etc.)	-Copy of mortgage statements and proof of payment -Copy of homeowner, auto and/or health insurance statements and proof of payment -Receipts or proof of payment of other expenses
☐ Disability	-Proof of disability (including date of occurrence, medical documentation, letter from vocational rehabilitation, etc.) -Copy of recent pay stub from all jobs held by student, spouse and/or parent -Proof of disability income or statement indicating denial
☐ Divorce or Separation	-Copy of divorce decree or evidence of separate living accommodations -Copy of all Form W-2s
☐ Retirement	-Letter of separation from employer -Copy of final pay stub showing YTD earnings -Statement of projected Retirement benefit amounts
☐ Private elementary/secondary tuition paid for dependent	-Copy of paid invoice-letter certifying enrollment from school -Dependent must be listed on tax return
☐ Death of parent/spouse	-Photocopy of death certificate
☐ Other (natural disaster, etc.)	-Provide all supporting documentation

PART III: Personal Statement (attach additional sheet if necessary)

In your own words, fully explain your request. Include the names and relationships of people in your household who are affected by the circumstances (spouse unemployment, expenses for child, etc.) and include all pertinent dates (such as last date worked, number of weeks worked this year, etc.). Be sure to explain how you determined the amounts of income to include in Part IV. Attach additional sheet(s) if necessary.

PART IV: Reporting of Income

Please complete the following income worksheet to reflect actual and projected income for the current year (if necessary).

	Actual YTD Income From Work	Actual YTD Untaxed Income	Source of Actual YTD Income	Projected Income through End of year	Source of Projected Income
Student	$	$		$	
	$	$		$	
	$	$		$	
Spouse (Married Students)	$	$		$	
	$	$		$	
	$	$		$	
Father (Dependent Students)	$	$		$	
	$	$		$	
	$	$		$	
Mother (Dependent Students)	$	$		$	
	$	$		$	
	$	$		$	

For Office Use Only: **APPROVED** **DISAPPROVED**

Reviewed by: _____ **Date:** _____

Comments: _____

_____

Additional Comments:

2014-15 (V1) Standard Verification Worksheet

Your 2014-2015 FAFSA was selected for review in a process called Verification. In this process, your school will be comparing information from your FAFSA with copies of your (and your spouse's if you are married, or your parent's if you are dependent) 2013 Federal tax transcript, and/or with W-2 forms and/or with other financial documents. Complete this verification worksheet and submit it, along with other required documents, to the financial aid office as soon as possible to avoid a delay in processing your financial aid. If you need help, contact the financial aid office at your school. *Your school must review the requested information under the financial aid program rules (34 CFR, Part 668) and submit corrections if necessary.*

A. Student Information

_____
Last Name First Name MI

_____
Address (include apt. #)

_____
City State Zip Code

_____
Student ID Number

_____
Social Security Number

_____
Date of Birth

(_____)_____
Phone Number (include area code)

B. Family Information

Write the names of ALL household members* in the section below. **LIST YOURSELF FIRST!** Also write in the college name for any family member, excluding your parent, who will attend college at least half time between July 1, 2014 and June 30, 2015, and will be enrolled in a financial aid eligible program. If you need more space, attach a separate page.

******Independent Student***: List the people in **your household**. List yourself first, then your spouse if you have one, and your children **if you will provide more than half of their support from July 1, 2014 through June 30, 2015** even if they do not live with you. Include other people **only** if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

******Dependent Student***: List the people in your **parent's household.** List yourself first, then your parent(s)/stepparent(s) (even if you do not live with them), and your parent/stepparent's other children who live with them. Include parent/stepparent's other children who do not live with them **if** your parent/stepparent will provide more than half of their support from July 1, 2014 through June 30, 2015 or **if** the children would be required to give parental information when applying for federal student aid. List any other people who now live in your parent/stepparent's household **if** your parent/stepparent provides more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
(example) Missy Jones	*24*	*Wife*	*City University*	*(Yes or No)*
		SELF	*KCTCS*	

C. Income and Financial Information to Be Verified

☐ ***Check this box if anyone in the household listed in Section B received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) at any time during 2012 or 2013****. If asked by my school, I will provide documentation from the agency that issued the SNAP benefits during 2012 or 2013.*

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☐ **Check this box if you, the student, or your parent included in the household in Section B, paid child support in 2013.** Indicate below the name of the person who paid child support, the name of the person to whom child support was paid, the name of the child/children for whom child support was paid, and the total amount of child support that was paid in 2013. If asked by my school, I will provide documentation of the payment of child support.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Child Support was Paid	Amount of Child Support Paid in 2013
(example) Marty Jones	*Chris Smith*	*Terry Jones*	*$6000*

☐ **Check this box IF A TAX RETURN WAS FILED and complete the section below. If you (and your spouse or parents, if applicable) filed a 2013 tax return, check all the boxes that apply (see additional instructions included with worksheet).**

STUDENT	SPOUSE	PARENT	
☐	☐	☐	**used** the IRS Data Retrieval Tool (DRT) in *FAFSA on the Web* to transfer 2013 IRS income tax info to the FAFSA when I first submitted the FAFSA.
☐	☐	☐	**did not use** the IRS DRT in *FAFSA on the Web* when FAFSA was first submitted, **but used** DRT to transfer income tax info to the FAFSA on (MM/DD/YY) _____/_____/_____.
☐	☐	☐	**is unable or chose not to use** the IRS DRT and **has included** a 2013 IRS **Tax Return** transcript along with this worksheet to the college financial aid office.

☐ **Check this box IF A TAX RETURN WAS NOT FILED and complete the section below. If you (and your spouse or parents, if applicable) are not required to file a 2013 federal tax return, check all the boxes that apply.**

STUDENT	SPOUSE	PARENT	
☐	☐	☐	**was not employed** and earned no income from work in 2013.
☐	☐	☐	**was employed and earned income** from work in 2013 but **was not required to file** a tax return. List **all** employers in the section below even if you did not receive a W-2 Form. Attach all W-2 Forms received. ***Attach a separate sheet if more space is needed.***

Employee Name	Employer Name	2013 Amount Earned	W-2 Form Received?
(example) John Smith	*Suzy's Body Shop*	*$2000*	*(Yes or No)*

D. Certification and Signatures

Each person signing this worksheet certifies that all information reported on it is complete and correct. If student is dependent, at least one parent must sign.

Your financial aid cannot be processed until the financial aid office receives the required Verification documents. Your school must review the requested information, under the financial aid program rules (34 CFR, Part 668), and submit corrections if necessary.

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 (Dependent Students Only) Date

2014-2015 INSTRUCTIONS FOR VERIFYING TAX INFORMATION

The best way to verify income is by using the **IRS Data Retrieval Tool (DRT)** that is part of the FAFSA on the Web. If you have not already used the tool, go to www.fafsa.gov, log in and select "Make FAFSA Corrections." In the Financial Information section of the form, follow the instructions to determine if you are eligible to use the IRS DRT to transfer 2013 IRS income tax information into your FAFSA. You should be able to use the IRS DRT within 2-3 weeks after filing your return. Both the student and parent, if dependent, should use the DRT.

If you are unable or choose not to use the IRS DRT, you **must** obtain an IRS tax return transcript (copies of your original Form 1040 tax return are not acceptable for verification purposes). In most cases, for electronic filers, a 2013 IRS Tax Return Transcript is available from the IRS within 2-3 weeks after filing. If you filed a paper return, expect 8-11 weeks for your transcript to be available.

To request an IRS tax return transcript, go to www.IRS.gov and click the "Get Transcript of Your Tax Records" link. Make sure you request the "**Tax Return**" transcript and **NOT** the "Tax Account" transcript. Use the Social Security Number and date of birth of the first person listed on the 2013 tax return and the address on file with the IRS (normally the address used when your 2013 IRS tax return was filed).

You may select "Get Transcript ONLINE" and immediately print your transcript or Get Transcript by MAIL. Provide the transcript to the financial aid office along with your Verification Worksheet.

If you are unable or choose not to use the DRT and cannot access your IRS **"Tax Return"** transcript online, you must call the IRS at 1-800-908-9946 to receive a transcript.

Special Situations:

Amended Returns-If you filed an amended tax return, you must submit a signed copy of your original Form 1040 **OR** an IRS Tax Return Transcript **AND** a signed copy of your Form 1040-X, "Amended U.S. Individual Income Tax Return" along with your completed Verification Worksheet.

Victims of IRS Identity Theft-A victim of IRS identity theft who is not able to obtain a 2013 IRS Tax Return Transcript or use the IRS DRT must contact the IRS at 1-800-908-4490 to receive a printout of the tax return by mail. Submit this printout along with documentation of the identity theft to the financial aid office along with your Verification Worksheet.

Non-IRS Income Tax Returns-An individual who filed or will file a 2013 income tax return with Puerto Rico, another U.S. territory, or with a foreign country must provide a signed copy of the 2013 income tax return along with the Verification Worksheet.

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