



Student Name _____ Student ID # _____

Step 1 – Verification of Current Free Application for Federal Student Aid (FAFSA) Data

Before re-evaluating your financial aid eligibility, we will need to verify the information submitted on your FAFSA is correct. To complete this process, you must submit the following documents **if you have not already done so**:

- 2023-2024 Household Verification Worksheet (Dependent version if your parents' information was provided on the FAFSA; otherwise, independent version)
- 2021 Tax Return Transcript for student (if required to file a return) or a **signed** copy of your 2021 Federal Income Tax Return; including Schedules 1, 2, and 3
- For Dependent Students Only (those who provided parent information on the FAFSA): 2021 Tax Return Transcript for parents or a **signed** copy of your parents' 2021 Federal Income Tax Return, including Schedules 1, 2, and 3

Step 2 – Reason for Re-Evaluation Request and Documentation Requirements

Please be aware that a re-evaluation request does not guarantee an increase in your financial aid. Please provide a written statement explaining your circumstances. Check the appropriate box below and include the documentation listed.

- ☐ **Loss/Reduction of Employment or Retirement/Military Discharge**
 - Documentation from previous employer indicating dates of changes in employment status (letter, exit paperwork, DD214-Member 4 copy, etc.)
 - Most recent or final paystub. Ten weeks must have elapsed since loss of employment
 - IRS Tax Return Transcript for 2022 or a **signed** copy of their 2022 Federal Income Tax Return, including Schedules 1, 2, and 3
 - 2021 and 2022 W-2 forms
 - Verification of unemployment benefits, if applicable
 - Verification of severance package, pension, retirement benefits, etc.
- ☐ **Loss of Other Income – Unemployment Benefits, Child Support, Taxable Social Security Benefits, Etc.**
 - Statement from organization (unemployment office, Friend of the Court, Social Security) indicating when the income/benefit ended
 - Verification of benefit amount received in 2021
- ☐ **Death of a Spouse**
 - Copy of Death Certificate
 - Copies of 2021 and 2022 W-2 Forms (or other income documentation)
- ☐ **Divorce/Separation**
 - Copy of divorce decree or verification of filing for divorce
 - In the case of legal separation, documentation of separate households (lease, mortgage, utility bills)
 - Copies of 2021 W-2 Forms or other income documentation to separate income if a joint return was filed
- ☐ **Receipt of One-Time Income – Pension Withdrawal, Sale of Home, Etc.**
 - Documentation showing the source of the income (Form 1099-R, etc.)
 - Verification showing how much of the one-time funding is still available and how funds were spent
- ☐ **Marriage after FAFSA Filing**
 - Copy of Marriage License
 - Recent paystubs for you and your spouse
 - Student's and spouse's IRS 2021 Tax Return Transcripts or a **signed** copy of 2021 Federal Income Tax Returns, including Schedules 1, 2, and 3
 - 2023-2024 Independent Student Household Verification Worksheet
- ☐ **Excessive Medical Bills/Insurance Premiums Paid Out of Pocket in 2021**
 - Schedule A from Form 1040 if expenses were itemized,
Or
 - Copies of **paid** receipts/cancelled checks
 - For insurance premium withheld from earnings, copy of paystub
 - **Only include bills paid out of pocket, not those covered/reimbursed by insurance**



☐ **Other**

- Provide a detailed explanation in your letter, as well as appropriate documentation
- Contact our office if you are unsure about what type of documentation to provide

Step 3 - Income Estimates

Provide income information (or best estimate) for the entire year requested – January 1 through December 31 Be sure to use amounts for the year, rather than monthly amounts.	2022 Student	2022 Spouse	2023 Student	2023 Spouse
Total Wages (include partial year amounts if individual is no longer employed but worked for part of the year)	\$	\$	\$	\$
Interest/Dividend Income	\$	\$	\$	\$
Unemployment Benefits	\$	\$	\$	\$
Severance Pay	\$	\$	\$	\$
Taxable Social Security Benefits (do not include untaxed amounts)	\$	\$	\$	\$
Child Support Received Include total to be received for all children as well as partial year amounts if benefits will stop or be reduced during the year)	\$	\$	\$	\$
Alimony	\$	\$	\$	\$
Worker's Compensation	\$	\$	\$	\$
Retirement Benefits	\$	\$	\$	\$
Insurance Benefits	\$	\$	\$	\$
Disability Benefits	\$	\$	\$	\$
Military or Clergy Housing/Food Allowances	\$	\$	\$	\$
Payments to Tax Deferred Pension/Savings Plans (paid directly or withheld from earnings)	\$	\$	\$	\$
Other (list source)	\$	\$	\$	\$
Total Income	\$	\$	\$	\$

Child Support you will PAY If you report child support to be paid, you must list the following: Name of person who will pay support: <hr/> Name of person to whom support will be paid: <hr/> Names of children for whom support will be paid: <hr/> <hr/> <hr/>	\$	\$	\$	\$
Alimony you will PAY	\$	\$	\$	\$

We will act on your request for re-evaluation only after receiving all verification and supporting documentation which confirms your circumstances. **Please be aware that a re-evaluation request does not guarantee an increase in your financial aid.** An increase in financial aid eligibility depends on the availability of funds and demonstrated financial need. A decision on your request may take several weeks to complete, and additional documents may be requested. All information will remain strictly confidential. **The person signing below certifies that all the information reported above is complete and correct.**

Student _____ Date _____