

2022-2023 SPECIAL CIRCUMSTANCES APPEAL - DEPENDENT

Directions - If you have extenuating circumstances that the standard federal formula of analyzing need does not consider, please complete this form and return it to our office. Processing time for these appeals can be up to four weeks.

In order to verify your income prior to adjusting it based on the circumstances you indicate below, **you will need to submit a Standard Verification Form (V1) along with your appeal.** This includes 2020 IRS Tax Transcripts if you and/or your parent did not use the IRS Data Retrieval Tool when you completed the FAFSA and a 2021 IRS Tax Transcript or signed 2021 Tax Return with all schedules. **You must also include a personal statement in the space provided. Incomplete appeals will not be processed, please include all requested items.**

Part A. Student Information		
Name (last,first, middle initial)	Student ID#	Phone (include area code)
Part B. Type of Special Circumstance		
(x)	Check all that apply and submit the required documents. This includes a personal statement.	
	<p>Retirement:</p> <ol style="list-style-type: none"> 1. Letter of separation from employer, 2. Copy of last pay stub showing earnings, 3. Statement of retirement benefits, 4. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 5. V1 Dependent Verification Form 6. Complete a written statement explaining your circumstance. 	
	<p>Death of a Parent/Spouse:</p> <ol style="list-style-type: none"> 1. Copy of death certificate or obituary notice with dates after FAFSA was filed, 2. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 3. Copy of 2020 and 2021 W2s for surviving parent 4. V1 Dependent Verification Form 5. Complete a written statement explaining your circumstance. 	
	<p>Loss of Employment due to Layoff or Termination:</p> <ol style="list-style-type: none"> 1. Letter on employer company letterhead with last date of employment, 2. Proof of severance/buy-out package and year-to-date income, 3. Copy of unemployment benefits OR statement of ineligibility, 4. Copy of last pay stub showing earnings, 5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or IRS Tax Transcripts, 6. V1 Dependent Verification Form 7. Complete a written statement explaining your circumstance. 	
	<p>Change in Employment Status, from full-time to part-time, or reduction in wages:</p> <ol style="list-style-type: none"> 1. Letter on employer company letterhead with the change effective date, 2. Documentation of year-to-date income, 3. If you reduced work hours to attend school, provide a statement to explain, 4. Copy of last pay stub showing earnings, 5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 6. V1 Dependent Verification Form and 7. Complete a written statement explaining your circumstance. 	
	<p>Loss of Other Income from child support, etc.:</p> <ol style="list-style-type: none"> 1. Letter regarding ending payments from parent paying child support, 2. Statement from the Court, including stop dates and amounts, 3. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 4. V1 Dependent Verification Form 5. Complete a written statement explaining your circumstance. 	
	<p>Non-recurring income - IRA or pension distribution, inheritance, etc.:</p> <ol style="list-style-type: none"> 1. Documentation of income type and amount, 2. Documentation of how the funds were spent or invested, 3. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 4. V1 Dependent Verification Form and 5. Complete a written statement explaining your circumstance. 	

	<p>Marital separation or divorce after the FASFA was filed:</p> <ol style="list-style-type: none"> 1. Copy of divorce decree or documentation of separation (Separate Maintenance Agreement or attorney’s letter), 2. Proof of separate residences, 3. Explanation of when divorce will be filed and when separation started, 4. Documentation verifying child support you are receiving for minor children, 5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 6. Copy of 2020 and 2021 W2s for custodial parent, 7.V1 Dependent Verification Form 8. Complete a written statement explaining your circumstance.
	<p>Private School K-12 Tuition: Letter from the child’s school stating the 2021-22 tuition minus scholarships/discounts; which identifies the child by name and a written statement explaining the request..</p>
	<p>Non-reimbursed Medical/Dental Expenses:</p> <ol style="list-style-type: none"> 1. Documentation of medical/dental expenses for 2021 or 2022 2. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts with itemized deduction worksheet if applicable. 3. V1 Dependent Verification Form 4. Complete a written statement explaining your circumstance.
	<p>Other:</p> <ol style="list-style-type: none"> 1. Supporting documentation related to your request. 2. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts. 3. V1 Dependent Verification Form 4. Complete a written statement explaining your circumstance.
<p>Part C. Required – Statement of Explanation (Attach separate sheet if needed.)</p>	
<p>Part D. Certification</p>	
<p>You must sign this form certifying that the information you provided is true. Misrepresentation of facts in connection with this form may be sufficient cause, in and of itself, for cancellation or repayment of financial aid, whenever discovered.</p>	
<p>Student Signature</p>	<p>Date</p>



2022-2023
Verification Worksheet
Dependent
(VI)

Mail: Saint Martin's University
Student Financial Services Office
5000 Abbey Way SE
Lacey, WA 98503
P: (360) 438-4397
F: (360) 412-6190

Your application has been selected for review in a process called "Verification". In this process, the information from your Free Application for Federal Student Aid (FAFSA) will be compared with you and your parent(s)' Federal IRS tax information as well as other financial 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 all required documents and submit to the Student Financial Services Office.

STUDENT INFORMATION

Last Name	First Name	M.I.	Student SMU ID Number
Address (include apartment number)			Date of Birth
City	State	Zip	Phone number (include area code)

FAMILY INFORMATION

Fill in the information below about the people your parent(s) will support between July 1, 2022 and June 30, 2023. **INCLUDE YOURSELF, YOUR PARENT(S) (including Stepparent), YOUR SIBLINGS AND ANY OTHERS WHO RECEIVE MORE THAN HALF OF THEIR SUPPORT FROM YOUR PARENT(S).** List the name of the college others will be **attending if they are enrolled in a degree, diploma, or certificate program for at least six credits per term between July 1, 2022 and June 30, 2023.**

Name	Age	Relationship to you	College Attending
		Self	Saint Martin's University

INCOME VERIFICATION INSTRUCTIONS

The easiest way to verify income is to use the IRS Data Retrieval Tool when completing or updating your FAFSA on the federal web site. If you did not use the IRS Data Retrieval Tool when completing or updating the 22-23 FAFSA, you should log back into the FAFSA and use the IRS Data Retrieval tool. If you need instructions to use the tool please visit our website and expand the HELP Forms section under the Financial Aid Forms section.

In you are unable to use the IRS tool; you must request a 2020 IRS Tax Return Transcript or provide a signed copy of you and your parent's 1040, 1040A or 1040EZ Tax Returns and any Schedules that were filed with the taxes. You can request a 2020 IRS Tax Return Transcript via www.irs.gov or call 1-800-908-9946. Be sure to request a 2020 Tax Return Transcript, NOT an Account Transcript. If you or your parent(s) did not and will not file a 2020 Federal tax return, please check the appropriate box below and submit a Letter of Non-Filing from the IRS

STUDENT INCOME (Please Select One Box)

- I used/will use the IRS Data Retrieval process when completing/updating the 2022-2023 FAFSA.
- Please indicate the date you **used the tool /will use** the tool to transfer your 2020 Tax Filing _____
- My 2020 Federal IRS Tax Return or Transcript(s) is attached **or** I have requested a 2020 IRS Tax Return Transcript from the IRS. (Foreign tax return filers may submit signed photocopies.) **See Income Verification section above for important details.**
- Please indicate the date you requested the 2020 IRS Tax Transcript _____
- I will not file and am not required to file a 2020 Federal tax return, but received a 2020 W-2
- Write in the amount you earned in 2020 and **enclose all of your 2020 W-2s.** \$ _____
- I will not file and am not required to file a 2020 Federal Tax return and did not receive a W-2 in 2020.
- If you earned wages in 2020 from odd jobs or other non-W2 jobs, you must report them below.
 - Amount Earned \$ _____ Source of Income _____

PARENT(S) INCOME (Please Select One Box)

- My parent(s) used the IRS Data Retrieval process when completing/updating the 2022-23 FAFSA.
- Please indicate the date you **used the too/will use** the tool to transfer your 2020 Tax Filing _____
- My parent(s) 2020 Federal IRS Tax Return or Transcript(s) is/are attached **or** they have requested a 2020 Tax Return Transcript from the IRS. (Foreign tax return filers may submit signed photocopies.) **See Income Verification section above for important details.**
- Please indicate the date you used requested the 2020 IRS Tax Transcript _____
- My parent(s) will not file and are not required to file a 2020 Federal tax return.
- Write in the amount they earned in 2020 and **enclose all 2020 W-2s:** Father \$ _____ Mother \$ _____
- My parents will not file and are not required to file a 2020 Federal Tax Return and did not receive a W-2 in 2020. **If you select this option you must provide a Verification of Non-Filing Letter from the IRS, even if you earned zero wages in 2020.**
- I If you earned wages in 2020 from odd jobs or other non-W2 jobs, you must report them below.
 - Amount Earned \$ _____ Source of Income _____

CERTIFICATIONS AND SIGNATURES

By signing this worksheet, I/we certify that all of the information reported is complete and correct. I/We also acknowledge that I/we have read and agree to comply with all verification policies as stated by the University. **Failure to submit information in a timely fashion may result in the application being filed as inactive** with no further consideration and no federal aid for the academic year. Student and parent must sign:

Student

Date

Parent

Date

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

Internal Use Only
Date Received: