

FINANCIAL AID OFFICE  
2014-2015 REQUEST FOR REVIEW OF **CALENDAR YEAR** INCOME DATA  
Dependent Student

**Special Circumstances**

**I  
M  
P  
O  
R  
T  
A  
N  
T**

Federal and state regulations require all applicants to report calendar year 2013 income figures on their 2014-2015 Free Application for Federal Student Aid (FAFSA) or CA Dream Application (if AB540). Regulations also allow the Financial Aid Office to revise the information on your financial aid application for award year 2014-2015, 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 or CA Dream Application (if AB540) to reflect your and your parents' income for the calendar year 2014. 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' 2013 IRS Transcript of Tax Return
  - Student's 2013 IRS Transcript of Tax Return
  - Parents' 2013 W-2's
  - Student's 2013 W-2's
  - Parents' 2014 IRS Transcript of Tax Return
  - Student's 2014 IRS Transcript of Tax Return
  - Parents' 2014 W-2's
  - Student's 2014 W-2's
  - 2014-2015 Personal Statement of Explanation
  - 2014-2015 Statement of Information
  - 2014 Parents' Projected Award Year Income Statement
  - 2014 Student's Projected Award Year Income Statement
  - Parents' Statement of Projected Basic Living Expenses
- } (only required if IRS Data Retrieval was not used, see attached instructions)
- } (if appeal is submitted after April 15, 2015)
- } (if appeal is submitted after January 31, 2015)
- } (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 all income since January 2014
-  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**



## 2014-2015 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  
2014 PARENTS' PROJECTED CALENDAR 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.

Parent (Mother/Father/Stepmother/Stepfather) 2014 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
Jan. 2014			
Feb. 2014			
March 2014			
April 2014			
May 2014			
June 2014			
July 2014			
Aug. 2014			
Sept. 2014			
Oct. 2014			
Nov. 2014			
Dec. 2014			
<b>Income Totals</b>			

Parent (Mother/Father/Stepmother/Stepfather) 2014 Projected Income			
	GROSS Taxable*	Untaxed**	Source of Income
Jan. 2014			
Feb. 2014			
March 2014			
April 2014			
May 2014			
June 2014			
July 2014			
Aug. 2014			
Sept. 2014			
Oct. 2014			
Nov. 2014			
Dec. 2014			
<b>Income Totals</b>			

**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

FINANCIAL AID OFFICE  
2014 STUDENT'S PROJECTED CALENDAR 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.

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

**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**  
**January 2014 - December 2014**

**INSTRUCTIONS:** Have your parents complete the information below by listing expenses that they will pay between January and December 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 Parents' Income \_\_\_\_\_ Total All Income \_\_\_\_\_

FINANCIAL AID OFFICE  
**IRS Request for 2013 Transcript of Tax Return**

If you or your parents filed a 2013 federal tax return 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' IRS tax return and transfer that information directly into your 2014-2015 [FAFSA](http://fafsa.gov) (fafsa.gov). If you transfer the data from the IRS to your FAFSA, you will not be required to provide a transcript of tax return. Once our office receives verification that the information was retrieved from the IRS (and remains unchanged), the IRS Tax Transcript requirement will be waived. 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 2013 Transcript of Tax Return from the IRS.*

**A separate transcript is needed for each tax return filed**

A transcript of tax return 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 tax preparer or the IRS made after the return was filed. **If your parents are married but filed separate federal tax returns in 2013, we need a separate 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](http://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 "2013" 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 "2013" 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**

- If you are unable to use the "Get Transcript" website, fill out 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 tax transcripts check box #6a. For question #9 enter "2013". 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 lived in or your business was in**" 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**

- 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 enter "2013". 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 1099)**" 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 2013.