



Student Financial Services

2017-2018 Special Circumstances Request for Dependent Student

Student Name: _____ **Student ID#** _____

Email: _____ **Home/Cell Phone** _____

This document outlines a request for a review of special circumstances that you feel may change your financial aid eligibility. Professional Judgment refers to the school's authority to make adjustments to the data elements reported on the Free Application for Federal Student Aid (FAFSA) so that the Department of Education can recalculate the Expected Family Contribution (EFC). The EFC is the number that the school uses to determine a student's eligibility for need based financial aid. The school does not have the authority to make direct adjustments to the EFC and can only change data elements that may change the EFC. The Student Financial Services Office requires that you provide certain documents to support your claim of special circumstances. The professional judgment process is an extensive process that requires a thorough review by financial aid staff to determine what, if any changes maybe appropriate based on your request. It is a time intensive process that includes the following steps:

- 1) The financial aid staff will determine if your appeal meets the basic criteria for further review.
- 2) If the basic eligibility requirements are met, the file will then be reviewed to determine if all required documentation has been submitted. If additional documentation is required the student will be notified via email.
- 3) Once we have received all of the necessary documentation we will first verify the accuracy of the information initially submitted on the FAFSA.
- 4) Once we have ensured the accuracy of the initial FAFSA information, we will then evaluate the appeal, make appropriate changes to the correct FAFSA file, and submit those changes to Department of Education.
- 5) The Department of Education will then recalculate the Expected Family Contribution (EFC) and the student's eligibility for need based aid.

PLEASE NOTE:

If we verify the current FAFSA and there is information that was estimated or reported incorrectly **the corrections may result in an EFC that is actually higher than what your current records indicate.** Therefore, the student may have received aid they never would have qualified for had the FAFSA information and the EFC been correct prior to the appeal. The student will lose any financial aid they weren't actually eligible for unless they demonstrate eligibility after a professional judgment is approved and then applied.

ALSO KEEP IN MIND:

Even if the Professional Judgment process results in a lower EFC, the change may not be enough to generate eligibility for need based financial aid and an increase in the financial aid award.

IMPORTANT POINTS AND DATES

- **Income Losses occurring in 2016 - will require a 2016 IRS Tax Transcript and W2's for both student and parent.**
- **Income Losses occurring in 2017 will require copies of 2017 W-2 and/or 1099 forms and will not be reviewed until a 2017 IRS Tax Return Transcript can be obtained.**
- **We recommend you complete your current award requirements & accept any current financial aid that you need to use to satisfy your bill.** Due to the nature of the Professional Judgment process your request may not be completed before the payment deadline. You must satisfy your semester bill even if your Professional Judgment application has not been reviewed or finalized or a Hold may be placed on your registration.

Please all pages of this worksheet AND all supporting documentation to:
Student Financial Services, 9601 Germantown Avenue, Philadelphia, PA 19118
Fax: (215) 242-7705 Email: finaid@chc.edu

STEP 1- Letter of Explanation

Provide a detailed letter of explanation regarding your current situation that you are asking us to consider. Please remember to include applicable dates and any documentation supporting your circumstance.

STEP 2- Required Documents

Complete the section below that corresponds to your circumstance. **NOTE the examples of documentation required for each situation.**

| SITUATION (Check the box for your situation) | REQUIRED DOCUMENTATION (check if included) |
|--|--|
| <input type="checkbox"/> Your parent(s) had a total loss of full-time employment for at least 8 weeks in 2017. ___ Check here if the loss of employment was due to disability or federally designated natural disaster Name of person unemployed: _____ Their relationship to Student: _____ Number of weeks Parent unemployed in 2017 to date: _____ | ___ Copy of 2015 IRS Tax Return Transcript and W-2's * ___ Employer's written notice of termination of employment ___ Copies of most recent pay stubs for all 2016/2017 employment ___ Document unemployment benefits & amount received in 2017 ___ Document all other sources of 2017 income (taxed & untaxed) ___ Attending doctor's statement of disability ___ Document date disability/disaster caused unemployment ___ Documentation of employer disability payments ___ Documentation of Worker's Compensation ___ Document Official Declaration of Natural Disaster status |
| <input type="checkbox"/> Your parent(s) had a total loss of untaxed income or benefit in 2017. Benefit Lost: ___ Unemployment ___ Social Security ___ Child Support <input type="checkbox"/> Other: _____ Last date benefit received _____ | ___ Copy of 2015 IRS Tax Return Transcript and W-2's* ___ Benefit provider's notification of loss of benefit in 2017 ___ Document amount of benefits received in 2017 ___ Copies of most recent pay stubs for all 2017 earnings ___ Document all other sources of income in 2017 (taxed & untaxed) In addition (as it applies) ___ Document unemployment benefits & amount received in 2017 ___ Court documents verifying date of loss of 2017 child support |
| <input type="checkbox"/> Your parent(s) had an unusual one-time income reported on their 2015 IRS Tax Return. *Note: Income used towards discretionary expenses may not be taken into consideration as a reason to adjust aid eligibility. | ___ Copy of 2015 IRS Tax Return Transcript and W-2's* ___ Copy of any 2015 1040 IRS Tax Return including all schedules/forms and any 1099's. ___ Documentation of source of income ___ Signed and dated statement indicating how the one time income was used along with supporting documentation. |
| <input type="checkbox"/> You have already filed your FAFSA and since that time: <input type="checkbox"/> Your parents separated/divorced. <input type="checkbox"/> Your parent has passed away. Date of occurrence _____ | ___ Copy of 2015 IRS Tax Return Transcript and W-2's* ___ Copy of student's birth certificate ___ Copy of court documented separation/divorce decree And/or Documentation of separate residences. ___ Copy of parent's death certificate or obituary |
| <input type="checkbox"/> Other: *Note: The Financial Aid staff will review your circumstance to determine if it is a viable situation for a professional judgment. | ___ Copy of 2015 IRS Tax Return Transcript and W-2's* ___ All applicable documentation to support your circumstance. |

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 Fax: (215) 242-7705 Email: fnaid@chc.edu

**** How to Obtain an IRS Tax Return Transcript From the IRS**

Be sure to request a Tax Return Transcript.

We cannot accept a Tax Account Transcript or copies of your 1040, 1040A or 1040EZ.

- Online request at www.irs.gov :
 1. On the main page under Tools, click “Get Transcript for My Tax Records”
 2. From here you may request a copy of you transcript to be received by mail.
- Paper Request: IRS Form 4506T – Must be used if you have moved since filing your taxes. Can be downloaded at www.irs.gov.
- Visit your local IRS Office.

STEP 3- 2016-2017 Income Information

| Please detail your income for 2016 and anticipated for 2017. If married, please list each income separately. Failure to complete this section will delay your appeal. | 2016 Parent 1 | 2016 Parent 2 | 2017 Parent 1 | 2017 Parent 2 |
|---|---------------|---------------|---------------|---------------|
| Earnings from Work | | | | |
| Unemployment Benefits | | | | |
| Severance Pay | | | | |
| Alimony | | | | |
| Child Support Received for All Children | | | | |
| Business Income and/or untaxed income and benefits | | | | |

STEP 4- Complete Verification Worksheet & Requirements

Complete the attached Verification Worksheet and attach all verification requirements listed on the form. This includes your and your parent(s) 2015 IRS Tax Transcript **and** 2015 W-2's. Return it with this request and your documentation to the Student Financial Services Office.

Required Signatures

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

STUDENT SIGNATURE: _____ **DATE:** _____

PARENT SIGNATURE: _____ **DATE:** _____

WARNING: If you purposely give false or misleading information in an attempt to obtain federal financial aid, you may be fined up to \$20,000 and/or incarcerated.

Your Free Application for Federal Aid (FAFSA) was selected for review in a process called verification. Before awarding Federal Student Aid, we must ask you to confirm the information you reported on your FAFSA. We will compare your FAFSA with the information you report on this form and any other required documentation. If there are differences, your FAFSA information may need to be corrected by you or by Chestnut Hill College. You and a parent whose information was reported on the FAFSA must complete and sign this worksheet and submit it to our office to prevent any delays in processing your request for financial aid. Submit this completed form with any required documentation to Student Financial Services.

Student Information:

| | | | |
|-----------------------|-------------------|-------------|---------------------|
| Last Name | First Name | M.I. | CHC ID# |
| E-Mail Address | | | Phone Number |

Section A

Dependent Student’s Family Information

List below the people in the parent(s) household. Include:

- The student
- The parent(s) (including a step-parent) even if the student does not live with the parent.
- Your parent(s)’ other children if your parents will provide more than half of their support from July 1, 2017, through June 30, 2018, or if the children would be required to provide parental information if they were completing a FAFSA for 2017-2018. Include children who meet either of these standards, even if they do not live with the parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2018.
- Include the name of the college for any household member, who will be enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2017, and June 30, 2018. If your parents are divorced or separated, answer the questions about the parent you lived with more during the past 12 months. (If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent.) If this parent is remarried as of today, answer the questions about that parent and your stepparent.

If more space is needed, provide a separate page with the student’s name and ID number at the top.

| Full Name | Age | Relation to Student | College |
|-----------|-----|---------------------|-----------------------|
| | | Self/Student | Chestnut Hill College |
| | | | |
| | | | |
| | | | |
| | | | |

Note: We may require additional documentation if we have reason to believe that the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

Name: _____

Student ID: _____

Instructions: Complete this section if you, the student, filed or will file a 2015 income tax return with the IRS. The best way to verify income is by using the **IRS Data Retrieval Tool** that is part of FAFSA on the Web. If you have not already used the tool, go to FAFSA.ed.gov, log in to your FAFSA record, select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2015 IRS income tax information into your FAFSA. If you need more information about when, or how to use the IRS Data Retrieval Tool you may contact the financial aid office.

Section B

Student Tax Transcript and Income Information

Are you or will you be required to file a 2015 Federal Income Tax Return? **You must check Yes or No.**

Yes. Please submit a copy of your 2015 Federal Tax Return Transcripts or transfer your tax information by using the **IRS Data Retrieval Tool (DRT) available through the student’s FAFSA.**

No. Complete the table below, submit copies of ALL 2015 W-2 forms. If applicable, enter zeros then continue to the next step. Do not leave blank. **YOU WILL BE REQUIRED TO PROVIDE CHESTNUT HILL COLLEGE WITH VERIFICATION OF A NON-FILING STATUS by completing a 4506T form.**

| Sources of Income (Fill out only if you did NOT file taxes) | IRS W-2 Provided? | Amount Earned in 2015 |
|--|----------------------|-----------------------|
| <i>(Example) ABC’s Auto Body</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

Parent(s) Tax Transcript and Income Information

Are you or will you be required to file a 2015 Federal Income Tax Return? **You must check N/A, yes or no.**

Yes. Please submit a copy of your parent’s 2015 Federal Tax Return Transcripts or transfer your tax information by using the **IRS Data Retrieval Tool (DRT) available through the student’s FAFSA.**

No. Complete the table below, submit copies of ALL 2015 W-2 forms. If applicable, enter zeros then continue to the next step. Do not leave blank. **YOU WILL BE REQUIRED TO PROVIDE CHESTNUT HILL COLLEGE WITH VERIFICATION OF A NON-FILING STATUS by completing a 4506T form.**

| Sources of Income (Fill out only if you did NOT file taxes) | IRS W-2 Provided? | Amount Earned in 2015 |
|--|----------------------|-----------------------|
| <i>(Example) ABC’s Auto Body</i> | <i>Yes</i> | <i>\$4,500.00</i> |
| | | |
| | | |
| | | |
| Total Amount of Income Earned From Work | | \$ |

Section C

Certification & Signature (*both parent and student signatures are REQUIRED*): By signing this worksheet, I certify all the information reported is complete and correct:

Student Signature Date

Parents Signature Date

Please all pages of this worksheet AND all supporting documentation to:
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Fax: (215) 242-7705 Email: fnaid@chc.edu