

2020-2021 Re-Evaluation of Household Form
Independent Students

Student Name: _____

VCU ID #: V _____

If you have experienced a loss of income because of divorce/separation or death of spouse, please submit this form and supporting documents to substantiate your circumstances. The office will re-evaluate your financial aid eligibility, if you have submitted your 2020-2021 Free Application for Federal Student Aid (FAFSA) to VCU. The submission of this appeal form does not guarantee additional consideration for financial aid programs.

Please check the box and submit all required documentation that applies to your circumstance.

<i>Special Circumstance</i>	<i>Additional Documentation Needed</i>
<input type="checkbox"/> Divorce/ Separation	Name of Person: _____ Effective Date: _____ <input type="checkbox"/> Copy of divorce decree, separation document, or letter from attorney <input type="checkbox"/> Or copies of spouse’s most recent paystub and utility bill to verify separate residence
<input type="checkbox"/> Death of a Spouse	<input type="checkbox"/> Copy of death certificate

Detailed Explanation of Circumstances (attach additional sheets if necessary)

2020-2021 Verification of FAFSA Information

You may skip this section if your FAFSA was selected for the verification process.

Please check the appropriate box below:

- The Verification Worksheet and 2018 income information has already been submitted.
- My FAFSA was not selected for Verification; the following sections will be completed.

A. Household Information

List all members residing in your household, including:

- Yourself,
- Your spouse if you have one, regardless of gender, and
- Other people if they now live with you, and you provide more than half of their support from July 1, 2020 through June 30, 2021.

Full Name	Age	Relationship	College Enrollment (July 1, 2020 – June 30, 2021)
		Self	VCU

You may skip this section if your FAFSA was selected for the verification process and documentation has already been submitted.

Copies of all 2018 W-2 forms, for student and spouse (if applicable), are required regardless of tax filing status.

B. Student's 2018 Financial Information

- I did not earn wages in 2018, did not file a 2018 federal tax return, and am not required to file a 2018 federal tax return.
- I earned wages in 2018 and filed a 2018 federal tax return.
 - I successfully utilized the IRS Data Retrieval Tool in the FAFSA
 - I am attaching a copy of my 2018 federal tax return transcript or a signed copy of my federal tax return.
 - I earned wages in 2018 but did not, and am not, required to file a 2018 federal tax return.

Please list sources of income and amounts received in 2018 if you did not file a 2018 federal tax return.

Name of Employer	2018 Wages Earned
	\$
	\$
	\$

C. Spouse's 2018 Financial Information (if student is married)

- My spouse earned wages in 2018 and filed a 2018 federal tax return.
 - I am attaching a copy of my spouse's 2018 federal tax return transcript (or signed copy of the 2018 federal tax return), filed separately from mine.
 - We filed jointly and I am submitting a copy our 2018 federal tax return transcript.
 - We successfully utilized the IRS Data Retrieval Tool in the FAFSA.
- My spouse did not, and is not required to, file a 2018 federal tax return.

Please list sources of income and amounts received in 2018 if you did not file a 2018 federal tax return.

Sources	2018 Income
	\$
	\$
	\$

Additional Financial Information and Untaxed Income

Use the table below to report annual amounts (not monthly) as indicated on your 2018 federal tax return and 2020-2021 FAFSA.

If the amount is zero, or the question does not apply to you, you must write "0".

DO NOT LEAVE ANY RESPONSE BLANK.

BE SURE TO COMPLETE BOTH THE PARENT AND STUDENT COLUMNS.

STUDENT'S 2018 Additional Financial Information

\$	a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 50.
\$	b. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
\$	c. Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. DO NOT include VCU scholarships or grants).
\$	d. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.
\$	e. Earnings from work under a cooperative education program offered by a college. (DO NOT include earnings from any VCU work program).

STUDENT'S 2018 Untaxed Income

\$	a. Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. Don't include amounts reported in code DD (employer contributions towards employee health benefit(s)).
\$	b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 28 + 32.
\$	c. Child support received for any of your children. Don't include foster care or adoption payments.
\$	d. Tax exempt interest income from IRS Form 1040 – line 2a.
\$	e. Untaxed portions of IRA distributions and pensions from IRS Form 1040—line 4a minus line 4b. Exclude rollovers. If negative, enter a zero here.
\$	f. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.
\$	g. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$	h. Other untaxed income not reported in items 44a through 44g, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 25. Don't include extended foster

care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

\$ _____
i. Money received, or paid on your behalf (e.g. bills), in 2018, not reported elsewhere on this form.
\$ _____

Certification

By signing below,

- I certify that all the information contained on this form, and all documentation provided, is accurate and complete to the best of my knowledge.
- I agree to provide additional information if it is required.

Student Signature: _____

Date: _____

Spouse Signature: _____
(optional)

Date: _____

Please submit this form and all supporting documentation directly to the Student Financial Management Center.

In Person: Harris Hall, First Floor

Mail: VCU
Student Financial Management Center
Harris Hall
1015 Floyd Avenue, First Floor
Box 843026
Richmond, VA 23284-3026

Fax: (804) 827-0060

Email: **Last names beginning with A-G:** faidmailag@vcu.edu
Last names beginning with H-N: faidmailhn@vcu.edu
Last names beginning with O-Z: faidmailoz@vcu.edu



VCU

Student Financial Services
Financial Aid