

ONE-TIME INCOME OR PAYMENT EXCLUSION REQUEST

Student's Name: _____

Student's SWIC ID #: _____

Students may complete this form to request a reassessment of their financial need due to receipt of a one-time income or benefit payment in 2021. There must have been a legitimate change (at least 10% of original income) to qualify for an adjustment. On a case-by-case basis, your request will be evaluated based on the documentation provided below. Not all changes result in increased eligibility.

THINGS TO CONSIDER PRIOR TO SUBMISSION

Upon submission of this request, you are requesting a manual review of your financial aid information. The manual review requires us to:

- Remove all current Title IV awards until the one-time payment special condition process is complete.
- Manually select your file for verification to ensure all FAFSA information is accurate.
- Re-evaluate your award eligibility based on the results of your special condition evaluation.

PLEASE NOTE: You must monitor your eSTORM and SWIC student email regarding changes to your account.

REQUIRED DOCUMENTATION FOR ALL SUBMISSIONS AND APPLICABLE SUBMISSION DATES Please follow guidelines according to the semester for which you are submitting your special condition packet.
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FALL/SPRING Primary (April 3, 2023 – July 7, 2023) • Secondary (September 4, 2023 – December 8, 2023)

Complete 2023-2024 FAFSA.

All required verification documentation.

2021 IRS Tax Return Transcript (student, and parent(s) or spouse) or signed tax return (with schedules 1, 2, 3, and C, if filed).

All 2021 W-2's and 1099's (student, and parent(s) or spouse).

All 2022 W-2's/1099's and signed 2021 federal tax return.

Documentation of 2021 one-time payment or benefit payment.

SPRING ONLY (1st day of spring enrollment – May 10, 2024)

Complete 2023-2024 FAFSA.

All required verification documentation.

2021 IRS Tax Return Transcript (student, and parent(s) or spouse) or signed tax return (with schedules 1, 2, 3, and C, if filed).

All 2021 W-2's and 1099's (student, and parent(s) or spouse).

All 2022 W-2's/1099's and signed 2022 federal tax return.

After February 1, 2024, also submit all 2023 W-2's /1099's and signed 2023 federal tax return with applicable schedules.

Documentation of 2021 one-time payment or benefit payment.

SUMMER (1st day of summer enrollment) (Case by case)

Complete 2023-2024 FAFSA.

All required verification documentation.

2021 IRS Tax Return Transcript (student, and parent(s) or spouse) or signed tax return (with schedules 1, 2, 3, and C, if filed).

All 2021 W-2's and 1099's (student, and parent(s) or spouse).

All 2022 and 2023 W-2's/1099's and signed 2022 and 2023 federal tax returns with applicable schedules.

Documentation of 2021 one-time payment or benefit payment.

