



St. John's University
Office of Student Financial Services
Financial Aid Reconsideration Form 2020-2021

Student's Name: _____ Student ID #: X _____

Date: _____

Email: _____ Phone: _____

If you and your family have experienced a major change in financial circumstances or would like to request a review of financial aid eligibility you may request reconsideration for financial aid. The Financial Aid Appeals Committee will review your appeal and determine if additional financial aid may be able to be offered to you. You will be notified of any changes to your financial aid awards by both email and U.S. Mail.

Important Notes:

- Include student's name and University ID# (X#), on every document submitted.
- Allow a minimum of **2 weeks** after submitting this form and **all required/requested documents** for review of your appeal.
- **All listed documents must be submitted at the time of submission of this Reconsideration Form.**
- If needed, St. John's will request additional information to support your Reconsideration request.

Required for all appeals:

- A valid 2020-2021 Free Application for Federal Student Aid (FAFSA) must be on file with St. John's University.
- Check off the reason for your appeal and submit all documentation listed on the related Required Documentation Checklist with this completed/signed Financial Aid Reconsideration Form.
- Submit a signed and dated statement explaining the basis for the Reconsideration request.

Please note: A review of submitted documentation may not result in a change in your financial awards.

To Submit:

Please upload all supporting documentation to:

<https://sftp.databankimx.com/form/StJohnsFinancialServicesDocumentSubmission>

OR

FAX to: 888-840-2618

OR

Mail to:

Office of Student Financial Services
St. John's University Processing Center
P.O. Box 548
Randolph, MA 02368-0548

You should make a copy of this worksheet for your records.

The deadline date for appeal/financial aid reconsideration is November 1, 2020 for the 2020-2021 Award Year

Check	Reason for Appeal	Required Documentation Checklist
_____1.	Loss of parental income due to separation or divorce of student's parents or Loss of student's income due to separation or divorce of student and spouse	<input type="checkbox"/> Copy of divorce decree <u>or</u> <input type="checkbox"/> Copy of legal separation agreement <u>or</u> <input type="checkbox"/> Copy of letter from attorney stating the earliest date of separation <u>or</u> <input type="checkbox"/> If separation is not yet legal, proof that parents or student and spouse, are living in separate addresses (i.e. utility bills, lease agreements from each parent or student/spouse) <input type="checkbox"/> 2018 Tax return transcript or signed 2018 Tax return and 2018 W-2 form(s) for the custodial parent <input type="checkbox"/> 2020-2021 Verification Worksheet
_____2.	Loss of parental income due to COVID-19 Or Loss of student income due to COVID-19	<input type="checkbox"/> Submit a copy of termination letter <input type="checkbox"/> Provide a copy of last pay stub received <input type="checkbox"/> Submit proof of unemployment benefits being received, if any <input type="checkbox"/> Provide a written statement of estimated income from all sources for the entire 2019 or 2020 calendar year as applicable, including all taxable and untaxed income expected <input type="checkbox"/> Proof of any severance pay received <input type="checkbox"/> 2018 Tax return transcript or signed 2018 Tax return and W-2 form(s) for each parent and or student <input type="checkbox"/> 2020-2021 Verification Worksheet
_____3.	Loss of parental income due to one of the parents death or Loss of student's income due to spouses death	<input type="checkbox"/> Copy of death certificate <input type="checkbox"/> If parents or student/ spouse filed taxes jointly in 2018, submit copies of each tax filer's 2018 W-2 forms <input type="checkbox"/> 2018 Tax return transcript or signed 2018 Tax return <input type="checkbox"/> 2020-2021 Verification Worksheet
_____4.	Unreimbursed Medical Expenses	<input type="checkbox"/> Submit a copy of 2018 IRS tax return transcript or signed 2018 Tax return and Schedule A. (Medical expenses must be listed) <input type="checkbox"/> 2020-2021 Verification Worksheet
_____5.	Since completing the FAFSA, the student/spouse or the student's parent has had a loss of income due to unemployment or retirement and has been out of work for at least ten weeks in 2019 or 2020.	<input type="checkbox"/> Submit a copy of termination letter <input type="checkbox"/> Provide a copy of last pay stub received <input type="checkbox"/> Submit proof of unemployment benefits being received, if any <input type="checkbox"/> Provide a written statement of estimated income from all sources for the entire 2019 or 2020 calendar year as applicable, including all taxable and untaxed income expected <input type="checkbox"/> Proof of severance pay received <input type="checkbox"/> 2018 Tax return transcript or signed 2018 Tax return and W-2 form(s) for each parent <input type="checkbox"/> 2020-2021 Verification Worksheet
_____6.	The student or parent(s) no longer receive untaxed benefits such as Social Security, VA benefits, child support, or other sources of income listed on the 2020-2021 FAFSA.	<input type="checkbox"/> Submit documentation of the benefit amount received and the termination date of that benefit <input type="checkbox"/> 2018 Tax return transcript or signed 2018 Tax return and W-2 form(s) for parent(s) <input type="checkbox"/> 2020-2021 Verification Worksheet
_____7.	Tuition was paid in 2018 or 2019 for a family member, other than the student applying for the appeal, for private elementary or high school tuition	<input type="checkbox"/> Submit a letter on school letterhead signed by a school official listing the amount of tuition paid from January through December of 2018 or 2019 <input type="checkbox"/> 2018 Tax Return Transcript or signed 2018 Tax return and W-2 form(s) for each parent <input type="checkbox"/> 2020-2021 Verification Worksheet
_____8..	Other (i.e Impacted by COVID-19)	<input type="checkbox"/> Please submit a signed, detailed letter explaining the financial circumstances which prevent you from meeting your/ the student's educational expenses.

Certify that all information reported is complete and correct to the best of my ability, and that I have attached the above documentation that applies to my situation.

Student Signature Date

Student's Spouse Signature Date

Parent 1 Signature Date

Parent 2 Signature Dat



St. John's University
Office of Student Financial Services
2020–2021 Dependent Student Verification Worksheet

Your 2020–2021 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required 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 any required documents, and submit all documents to the financial aid administrator at St. John's University. The financial aid administrator may ask for additional information. If you have questions about verification, contact a financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Dependent Student's Information

Student's Last Name Student's First Name Student's M.I. Student's St. John's X ID number

Student's Street Address (include apt. no.)

City State Zip Code Student's Email Address

Student's Home Phone Number (include area code) Alternate/Cell Phone Number

B. Dependent Student's Family Information

Number of Household Members: List below the people in the parents' household. Include:

- The student.
- The parents (including a stepparent) even if the student doesn't live with the parents.
- The parents' other children if the parents will provide more than half of the children's support from July 1, 2020, through June 30, 2021, or if the other children would be required to provide parental information if they were completing a FAFSA for 2020–2021. Include children who meet either of these standards, even if a child does not live with the parents.
- Other people if they now live with the parents and the parents provide more than half of the other person's support, and will continue to provide more than half of their support through June 30, 2021.

Number in College: Please include in the space below information about any household member, excluding parents, who is, or 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, 2020, and June 30, 2021, and include the name of the college.

Full Name	Age	Relationship	College (Enrolled between 7/1/20- 6/30/21)	Will be Enrolled at Least Half Time (Yes or No)
Missy Jones (example)	18	Sister	Central University	Yes
		Self	St. John's University	

If more space is needed, attach a separate page with your name and St. John's X ID at the top.

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.

Student's Name: _____ X ID: _____

C. Verification of 2018 Student Income Information- Please select one box

The instructions below apply to the student. Indicate in this section if the student, filed or will file a 2018 IRS income tax return or if the student will not and/or is not required to file a 2018 income tax return. Notify the Office of Student Financial Services if the student had a change in marital status after December 31, 2018.

Check (✓) the box that applies:

- ☐ The student **has used** the IRS DRT in *FAFSA on the Web* to transfer 2018 IRS income tax return information into the student's FAFSA.
- ☐ The student's **2018 IRS Tax Return Transcript or signed Tax Return and applicable schedule(s)** have already been submitted.
- ☐ The student's **2018 IRS Tax Return Transcript or signed Tax Return and applicable schedule(s)** is provided.
- ☐ The student was not employed and had no income earned from work in 2018.
- ☐ The student was employed in 2018 and was not required to file a 2018 tax return. Please list below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form.

Employer's Name	Annual Amount Earned in 2018	IRS W-2 or an Equivalent Document Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>
Total Amount of Income Earned From Work	\$	

If more space is needed, attach a separate page with your name and St. John's X ID at the top.

D. Verification of 2018 Parent Income Information- Please select one box

The instructions below apply to each parent included in the household in section B of this worksheet. Complete this section if the parents filed or will file a 2018 IRS income tax return(s) or if the parent will not and/or is not required to file. Notify the Office of Student Financial Services if the parents filed separate IRS income tax returns for 2018 or had a change in marital status after December 31, 2018.

Check (✓) the box that applies:

- ☐ The parent(s) **has used** the IRS DRT in FAFSA on the Web to transfer 2018 IRS income tax return information into the student's FAFSA. *St. John's will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- ☐ The parent(s) **2018 IRS Tax Return Transcript or signed Tax Return and applicable schedule(s)** have already been submitted.
- ☐ The parent(s) **2018 IRS Tax Return Transcript or signed Tax Return and applicable schedule(s)** is provided.
- ☐ Neither parent was employed, and neither had income earned from work in 2018. **Please complete section E and submit an IRS Verification of Non-filing letter**
- ☐ One or both parents were employed in 2018 and was not required to file a 2018 Tax Return. Please list below the names of all employers, the amount earned from each employer in 2018, and whether an IRS W-2 form or an equivalent document is provided. List every employer even if the employer did not issue an IRS W-2 form. **Please complete section E and submit an IRS Verification of Non-filing letter**

Employer's Name	Annual Amount Earned in 2018	IRS W-2 or an Equivalent Document Provided?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>
Total Amount of Income Earned From Work	\$	

If more space is needed, attach a separate page with the student's name and St. John's X ID at the

E. Parent Verification of Non-Filing

A Verification of Non-filing Letter can be requested from the IRS online at www.irs.gov. Click "Get Your Tax Record" and Click "Get Transcript Online" or download and submit form 4506-T to the address on the form.

☐ Check here if confirmation of non-filing is provided

☐ Check here if confirmation of non-filing will be provided to St. John's at a later date.

F. Certification and Signatures

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

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.

Print Student's Name

Student's X ID Number

Student's Signature

Date

Parent's Signature

Date

To Submit:

Please upload all supporting documentation to:

<https://sftp.databankimx.com/form/StJohnsFinancialServicesDocumentSubmission>

OR

FAX to: 888-840-2618

OR

Mail to:

Office of Student Financial Services
St. John's University Processing Center
P.O. Box 548

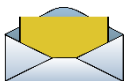
Randolph, MA 02368-0548

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The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of FAFSA on the Web at <https://studentaid.gov/h/apply-for-aid/fafsa>. In most cases, no further documentation is needed to verify 2018 income information that was transferred into the FAFSA using the IRS DRT if that information was not changed by the FAFSA filer.

Federal regulations require Tax filers to submit either a Signed Federal 2018 Tax Return or a 2018 IRS Tax Return Transcript. For individuals submitting a Tax Return Transcript, a **2018 IRS Tax Return Transcript** may be obtained through

- **Get Transcript by MAIL** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript by MAIL." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.



- **Get Transcript ONLINE** – Go to www.irs.gov, click "Get Your Tax Record." Click "Get Transcript ONLINE." Make sure to request the "IRS Tax Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.



- **Automated Telephone Request** – 1-800-908-9946. The transcript is generally received within 10 business days from the IRS's receipt of the telephone request.



- **Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.

