What is a FAFSA Adjustment? The Free Application for Federal Student Aid (FAFSA) requires students to provide household and 2018 tax information. For independent students, this includes spouse information, if applicable. For dependent students, this includes information for parents. The U.S. Department of Education calculates the Expected Family Contribution (EFC) with this information. The EFC represents a family's ability to contribute to a student’s college expenses.

Sometimes, there may be a special circumstance not reflected on the FAFSA that reduces a family's ability to pay for college. Situations can include:

- losing a job
- a reduction in taxed or untaxed income
- a large amount of healthcare expenses paid
- a parent attending college
- a change in parents’ marital status after the FAFSA was completed
- tuition expenses paid for a dependent child attending elementary or secondary school
- There also may have been an event where a higher income amount was reported on the FAFSA, such as: an inheritance, withdrawal of retirement funds, or a settlement, and those funds were spent for something specific that cannot be categorized as regular life expenses.

A FAFSA adjustment request allows the Wright State University Office of Financial Aid (OFA) to consider special circumstances and make approved changes to the FAFSA that reduces the EFC.

FAFSA Adjustment - Policy
Annually, and on a case-by-case basis, the OFA may recalculate a student’s EFC and re-evaluate a student’s financial aid offer due to the student’s documented special circumstance (or the special circumstance of a member of the student’s household: spouse or parents).

FAFSA Adjustment - Process
For the 2020-2021 academic year, students must complete and return the FAFSA Adjustment form and supporting documentation to Raider Connect no later than February 15, 2021. The submission of a FAFSA Adjustment Form does not guarantee that a student’s EFC will be adjusted.

Important Note:
Before FAFSA Adjustments can be reviewed by the OFA, the student will be required to complete the FAFSA Verification process. If the U.S. Department of Education has not already selected the student for verification, the OFA will assign verification requirements after receiving the FAFSA Adjustment form. Added requirements can be viewed in WINGS Express.

Upon receiving the FAFSA Adjustment form, the OFA will review the special circumstance documentation. If it qualifies for an adjustment, the OFA will recalculate the student’s EFC and re-evaluate the student’s financial aid offer. The OFA will notify students via their Wright State University email account when the review is complete.
### A. Student Information

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Cell Phone Number</th>
<th>Other Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**University ID (UID) – Required.**

<table>
<thead>
<tr>
<th>U</th>
<th>0</th>
<th>0</th>
</tr>
</thead>
</table>

*The Wright State University Office of Financial Aid can only review FAFSA Adjustment Forms that are complete, along with proper documentation. Forms must be submitted no later than February 15, 2021.*

### B. Special Circumstance and Required Documentation

Check the box for the circumstance that pertains to you or your family. [Include student name/UID on all documentation.]

<table>
<thead>
<tr>
<th>Special Circumstance categories</th>
<th>Required documentation</th>
</tr>
</thead>
</table>
| **Healthcare expenses (paid in 2019)** | - Excessive medical expenses paid out in 2019  
- Not covered by insurance  
- Not covered by a third-party  
- Amount higher than accounted for on FAFSA  
- Includes: medical, dental, premiums |
| □ | · Tax Transcript or signed copy of 2019 Federal Income Tax Form 1040  
· Schedule A (itemized deductions), if filed with tax return  
· Schedule A (itemized deductions), if filed with tax return  
· Copies: receipts, medical provider statements, canceled checks |
| **Loss of Income (2019 compared to 2018)** | - Change in income amounts reported on the 2020-2021 FAFSA, such as:  
· Wages, salaries, and tips  
· Unemployment  
· Adjusted Gross Income  
· Child support – paid out amount is more  
· Child support – received amount is less  
· Living allowances (military, clergy)  
· Veteran’s non-educational benefits |
| □ | · Must complete Section C of this form  
· W-2s for 2019 (include spouse’s also, if applicable)  
· Tax Transcript or signed copy of 2019 Federal Income Tax Form 1040  
· Schedules 1, 2, 3, if filed with tax return  
· A letter – (on company letterhead):  
· · Includes date of termination or reduction of wage earnings or employment hours  
· Documentation of untaxed income received from Jan. 2019 – Dec. 2019 |
| **One-time event** | - Occurred in 2018  
- Reported on 2020-2021 FAFSA  
- Funds spent on acceptable expense  
- Includes: inheritance; windfall; settlement; buyout; withdrawal of retirement funds |
| □ | · Must complete Sections C and D of this form  
· W-2s for 2019 (include spouse’s also, if applicable)  
· Tax Transcript or signed copy of 2019 Federal Income Tax Form 1040  
· Schedules 1, 2, 3, if filed with tax return  
· Documentation of untaxed income received from Jan. 2019 – Dec. 2019 |
| **Parent enrolled in college** | - Parent must be on 2020-2021 FAFSA  
- Enrolled in eligible program at least ½ time at a school eligible for federal financial aid |
| □ | · Enrollment verification for May 2020 – April 2021 from the college/university where parent is enrolled at least ½ time  
· Proof of payment (cannot be a pending payment) |
| **Parents’ marital status changed** | - Married as of date FAFSA was filed  
- Now separated, divorced, or widowed  
- Change occurred on/or Dec. 31, 2020 |
| □ | · Copy of death certificate; separation agreement; divorce decree  
· Tax Transcript or signed copy of 2019 Federal Income Tax Form 1040  
· Schedules 1, 2, 3, if filed with tax return  
· W-2s for 2019 (for the remaining parent in the household) |
| **Tuition expenses paid for dependent child** | - For elementary or secondary education  
- Amounts not covered by a third-party  
- Amount higher than accounted for on FAFSA |
| □ | · Names/ages of child(ren) included in tuition payments  
· Proof of tuition expenses paid from July 1, 2019 – June 30, 2020  
· Proof that tuition expenses were not covered by a third-party |
C. Untaxed Income and/or Income Exclusions

This section must be completed if the special circumstance is for a **Loss of Income** or a **One-Time Event**.

If married: please also complete items for spouse. (Enter -0- for items that do not have an amount.)

<table>
<thead>
<tr>
<th>Untaxed income; Income exclusions; and Assets</th>
<th>□ Mother/Step-mother</th>
<th>□ Father/Step-father</th>
<th>Complete this section only if documenting a special circumstance for the student.</th>
</tr>
</thead>
<tbody>
<tr>
<td>For January 1, 2019 – December 31, 2019</td>
<td></td>
<td></td>
<td>□ Student □ Student’s Spouse</td>
</tr>
<tr>
<td>Payments to tax-deferred pensions/retirement savings plans, including but not limited to: amounts reported on W-2 forms, Boxes 12a through 12d, codes D,E,F,G,H,S</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Child support received in 2019 If child support amount was reduced, provide documentation on agency letterhead for amount received.</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Housing, food, other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include: the value of on-base military housing or the value of basic military allowance for housing.</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Veteran’s non-education benefits, such as Disability, Death Pension, Dependency &amp; Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other untaxed income - includes worker's compensation and disability</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Money received or paid on your behalf (e.g. bills), not reported elsewhere on this form. This includes money received from a parent or other person whose financial information is not on this form and money that is not part of a legal child support agreement.</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Child support paid in 2019 If child support amount changed, provide documentation on agency letterhead for amount paid.</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Federal Work-Study wages earned in 2019</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

D. Itemized Statement for One-Time Event

Complete this section only if the special circumstance is for a **One-Time Event**.

*Please note:* federal regulations do not allow amounts used for vacations, tithing, standard living expenses, utilities, credit card bills, children’s allowances, home improvement, vehicle purchase/repair, special celebrations, etc.

<table>
<thead>
<tr>
<th>Itemize how funds from one-time event were spent and provide copies of documentation</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td>$</td>
</tr>
</tbody>
</table>

E. Certification Statement

I certify that the information I have provided on this form, and all the accompanying documentation, is true and correct to the best of my knowledge. I agree to submit additional documentation should the Office of Financial Aid make a request. (Handwritten signature required; Form may be emailed or faxed.)

<table>
<thead>
<tr>
<th>Student Signature</th>
<th>Date</th>
<th>Parent Signature (for dependent student only)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

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