



Student Request for Re-Evaluation of Financial Aid

RVAL

An incomplete form will be returned to you and will delay processing.

Student Name _____ NMU IN _____

Step 1 – Verification of Current Free Application for Federal Student Aid (FAFSA) Data

Before re-evaluating your financial aid eligibility, we will need to verify the information submitted on your FAFSA is correct. To complete this process, you must submit the following documents if you have not already done so:

- 2019-2020 Verification Worksheet (Dependent version if your parents' information was provided on the FAFSA; otherwise, Independent version)
2017 Tax Return Transcript for student (and spouse, if applicable) or a signed copy of your 2017 Federal Income Tax Return

Worksheets may be printed from: www.nmu.edu/financialaid/printableforms
Information on requesting tax transcripts can be found at: www.nmu.edu/financialaid/verification

Step 2 – Reason for Re-Evaluation Request and Documentation Requirements

Please be aware that a re-evaluation request does not guarantee an increase in your financial aid. Common reasons for requesting a re-evaluation are listed below, along with types of documentation required. Please provide a written statement explaining your circumstances, check the appropriate box below, and include the documentation listed.

Loss/Reduction of Employment or Retirement/Military Discharge

- Documentation from previous employer indicating dates of changes in employment status (letter, exit paperwork, DD214-Member 4 copy, etc.)
Most recent or final paystub, ten weeks must have elapsed since loss of employment
IRS tax return transcript for 2018 or a signed copy of your 2018 Federal Income Tax Return
2017 and 2018 W-2 Forms
Verification of unemployment benefits, if applicable
Verification of severance package, pension, retirement benefits, etc.

Receipt of One-Time Income – Pension Withdrawal, Sale of Home, Etc.

- Documentation showing the source of the income (Form 1099-R, etc.)
Verification showing how much of the one-time funding is still available and how funds were spent

Loss of Other Income – Unemployment Benefits, Child Support, Taxable Social Security Benefits, Etc.

- Statement from organization (unemployment office, Friend of the Court, Social Security) indicating when the income/benefits ended
Verification of benefit amount received in 2017

Marriage after FAFSA Filing

- Copy of Marriage License
Recent paystubs for you and your spouse to verify current income
Student's IRS 2017 Tax Return Transcript or a signed copy of your 2017 Federal Income Tax Return
Spouse's IRS 2017 Tax Return Transcript or a signed copy of their 2017 Federal Income Tax Return

Death of a Spouse

- Copy of Death Certificate
Copy of your 2017 and 2018 W-2 Forms (or other income documentation)

Excessive Medical Bills/Insurance Premiums Paid Out of Pocket in 2017

- Schedule A from Form 1040 if expenses were itemized, or
Copies of paid receipts/cancelled checks
For insurance premium withheld from earnings, copy of a pay stub
Only include bills paid out of pocket, not covered/reimbursed by insurance

Divorce/Separation

- Copy of divorce decree or verification of filing for divorce
In the case of legal separation, documentation of separate households (lease, mortgage, utility bills)
Copies of your 2017 W-2 Forms or other income documentation to separate income if a joint return was filed

Other

- Provide a detailed explanation in your letter, as well as appropriate documentation
Contact our office if you are unsure about what type of documentation to provide

Although each student's situation is reviewed on an individual basis, the following reasons generally do not result in a change to financial aid eligibility: bankruptcy, foreclosure, private primary/secondary school tuition. Please feel free to contact our office to discuss your situation prior to submitting this form.

Be sure to complete and submit both pages of this form and required documentation. Include the student's name and NMU IN on all items submitted.

Student Name _____

NMU IN _____

Step 3 – Income Estimates

Provide income information (or best estimate) for the entire year requested - January 1 through December 31 Be sure to use amounts for the year, rather than monthly amounts.	2018		2019	
	Student	Spouse	Student	Spouse
Total Wages (include partial year amounts if individual is no longer employed but worked for part of the year)	\$	\$	\$	\$
Interest/Dividend Income	\$	\$	\$	\$
Unemployment Benefits	\$	\$	\$	\$
Severance Pay	\$	\$	\$	\$
Taxable Social Security Benefits (do not include untaxed amounts)	\$	\$	\$	\$
Child Support Received (include total to be received for all children as well as partial year amounts if benefits will stop or be reduced during the year)	\$	\$	\$	\$
Alimony	\$	\$	\$	\$
Worker's Compensation	\$	\$	\$	\$
Retirement Benefits	\$	\$	\$	\$
Insurance Benefits	\$	\$	\$	\$
Disability Benefits	\$	\$	\$	\$
Military or Clergy Housing/Food Allowances	\$	\$	\$	\$
Payments to Tax Deferred Pension/Savings Plans (paid directly or withheld from earnings)	\$	\$	\$	\$
Other (list source) _____	\$	\$	\$	\$
Total Income	\$	\$	\$	\$
Child Support you will PAY If you report child support to be paid, you must list the following: Name of person who will pay support: _____ Name of person to whom support will be paid: _____ Names of children for whom support will be paid: _____ _____	\$	\$	\$	\$
Alimony you will PAY	\$	\$	\$	\$

We will act on your request for re-evaluation only after receiving all verification and supporting documentation which confirms your circumstances. **Please be aware that a re-evaluation request does not guarantee an increase in your financial aid.** An increase in financial aid eligibility depends on the availability of funds and demonstrated financial need. A decision on your request may take several weeks to complete, and additional documents may be requested.

I certify that, to the best of my knowledge, all of the information on this form is accurate. I also understand that Northern Michigan University may use follow-up procedures to verify data that I have submitted or which was submitted on my behalf. All information will remain strictly confidential.

Student Signature _____

Date _____

Be sure to complete and submit **both pages** of this form and required documentation. Include the student's name and NMU IN on all items submitted.