2018-19 Special Circumstance Form

There are special cases in which a financial aid administrator may use their professional judgement to review a student’s financial aid file and make adjustments so it more closely reflects their current financial situation. If you feel you have a special circumstance, please complete this form and submit all four pages along with additional documents as specified. If forms are incomplete, or you fail to submit all the required documentation at the same time, the forms will be returned and processing will be delayed.

Please Note:
• Special circumstances are considered a one-time occurrence and, as such, should only be requested once. In rare cases, a subsequent request may be considered.
• This form should only be completed by undergraduate students. Changes for graduate students would not result in any award changes.
• While you may be able to document a special circumstance, it may not result in additional aid eligibility.
• If you have questions, please contact us via phone, in-person, or the email above to discuss your situation.
• All required documents should be submitted as early as possible as processing times can take from 4 to 6 weeks. Deadlines to submit documents are indicated below for each term:

<table>
<thead>
<tr>
<th>Term</th>
<th>Deadline</th>
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<tbody>
<tr>
<td>Fall 2018</td>
<td>November 26, 2018</td>
</tr>
<tr>
<td>Spring 2019</td>
<td>April 22, 2019</td>
</tr>
<tr>
<td>Summer 2019</td>
<td>June 3, 2019</td>
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</tbody>
</table>

Section A – General Information

STUDENT NAME: STUDENT ID #:

THESE ITEMS ARE REQUIRED DOCUMENTATION FOR ALL REQUEST TYPES:

• 2018-19 Verification Worksheet. Select the appropriate version from the Forms section of our website. Use Dependent if you were required to provide parent information on your FAFSA or Independent if you did not have to provide parent information. Complete the worksheet by following the instructions and submit it to our office with all required documentation.

• 2016 IRS Tax Return Transcript(s). If required to file a 2016 federal tax return, request this document from http://www.irs.gov/Individuals/Get-Transcript (completing the FAFSA IRS Data Retrieval is not sufficient). If parent information was included on your FAFSA, parent(s) should request as well. If you are married, your spouse should request as well if you did not file a joint return. Please note: Individuals who did not file a 2016 Federal tax return must submit an IRS verification of non-filing letter which can be obtained by completing IRS form 4506-T, marking box 7 for verification of non-filing and entering the end year of 12/31/2016.

• 2017 IRS Tax Return Transcript(s) forms for you and your parents (if dependent per the FAFSA) or your spouse (if married and independent per the FAFSA). Per the guidelines above, if required to file a 2017 federal tax return, request this document from http://www.irs.gov/Individuals/Get-Transcript.

• 2017 W-2 forms for you and your parents (if dependent per the FAFSA) or your spouse (if married and independent per the FAFSA).
• Complete and submit this entire form per the instructions with appropriate supporting documentation.
Section B – Indicate Special Circumstance(s) Below

___ A. **Unreimbursed medical or dental expenses paid in 2016 or 2017.** Do not include monthly premiums or expenses if claimed as an itemized deduction on Federal Income Tax Returns during 2016 (January 1, 2016 – December 31, 2016) or 2017 (January 1, 2017 – December 31, 2017). As a general rule, these expenses should be at least 15% of your parents (if dependent) or your Adjusted Gross Income (AGI) in either the 2016 or 2017 tax year before submitting documentation.

**Documentation required:**
- *Proof of payment* such as billing statements, canceled checks or receipts (please total amounts).

___ B. **Unreimbursed elementary and/or secondary school tuition** paid or will be paid during the 2018-19 academic year (July 1, 2018 – June 30, 2019). As a general rule, these expenses should be at least 15% of your parents (if dependent) or yours (if independent) AGI in the 2017 tax year before submitting documentation.

**Documentation required:**
- *Proof of payment (or future payment)* such as billing statements, contracts, cancelled checks or receipts (please total amounts).

Section C – Divorced, Separated, or Deceased

___ A. If dependent, your parent(s), or if independent, you or your spouse, have become **separated or divorced after submission of your original FAFSA.** Please list the date of separation or divorce: _____/_____/_____.

**Documentation required:**
- Copy of the temporary separation order or divorce decree from the court. If such legal documents do not exist, documentation must be provided which shows two separate households such as lease(s), mortgage(s), electric bills, etc.

- If a joint Federal tax return was filed in 2016, submit copies of 2016 W-2 forms, 1099s and Schedule Cs, if applicable, for both individuals.

___ B. If dependent, your parent(s), or if independent, your spouse, whose 2016 income was reported on the FAFSA has died after submission of the FAFSA.

**Documentation required:**
- *Death certificate.*

- If a joint Federal tax return was filed in 2016, submit copies of 2016 W-2 forms, 1099s and Schedule Cs, if applicable, for both individuals.
Section D – Indicate Reason for Reduction of Income Below

_____ A. If dependent, you or your parent(s), or if independent, you and your spouse’s, (if married), taxable income or untaxed benefits in 2017 (January 1, 2017 - December 31, 2017) or 2018 (January 1, 2018 - December 31, 2018) will be at least 15% less than 2016. Please check specific reason(s) below:

A1 _____ Received a one-time lump sum payment in 2016 that will not be received in future years. Examples may include income from work activities, severance pay, taxable withdrawals from pensions, IRA’s or 401K’s, capital gains, etc.

Documentation required:
• Signed statement detailing the reason for one-time payment, the amount received and how the funds were/will be used. If dependent, the statement should be signed by you and at least one parent. If independent the statement should also be signed by your spouse, if married.
• Appropriate documentation from a third-party confirming the funds are a one-time payment.
• Must provide an estimate of 2018 income following instructions in Section E.

OR

A2 _____ Reduction in income due to being unemployed in 2017 or 2018 or a reduction in work status (i.e. full-time to part-time or under-employed).

Documentation required:
• Statement from previous employer(s) on company letterhead indicating last day of employment or in the case of reduced hours, a similar letter stating hours have been reduced and by how much.
• If dependent and the reduction is for yourself, you must submit copies of all your 2016 and 2017 W-2 forms. If the reduction is for your parent(s), you must submit all 2016 and 2017 W-2 forms for both your parent(s), if they are married. If independent submit all 2016 and 2017 W-2 forms for yourself and spouse, if married.
• Must provide an estimate of 2018 income following instructions in Section E.

OR

A3 _____ Reduction in untaxed income in 2017 or 2018 which could include child support received, alimony, disability benefits, etc.

Documentation required:
• Appropriate documentation showing the amount of the benefit received in 2016 and 2017.
• Statement from the appropriate agency showing the date the benefit was reduced and/or eliminated and the amount to be received in 2018.
• Must provide an estimate of 2018 income following instructions in Section E.

_____ B. Any other unique situation not listed, which you feel has resulted in a reduction of taxed and/or untaxed income in 2017 or 2018 of at least 15% as compared to 2016.

Documentation required:
• Approving additional items not listed above are rare, so you should contact us via phone, in-person, or email to discuss your particular situation.
• Signed statement detailing the situation which includes amounts. If dependent, the statement should be signed by you and at least one parent. If independent, the statement should also be signed by your spouse, if married.
• Appropriate documentation from a third-party supporting your statement.
• Must provide an estimate of 2018 income following instructions in Section E.
Section E – Estimated Income for 2018 (Complete if checked item in Section D)

You must submit information detailing the calculations of 2018 (January 1, 2018 through December 31, 2018) anticipated income. You can use the sheet below or provide similar information on a separate sheet. If you are dependent and the reduction is for yourself, you must provide your information. If the reduction is for your parent(s), you can provide the information just for the parent(s) listed on the FAFSA. If you are married, you must provide this information for yourself and spouse.

Reduction in 2018 income applies to (please check appropriate individuals):

☐ Parent 1 (father/mother/stepparent)  ☐ Parent 2 (father/mother/stepparent)
☐ Student  ☐ Spouse (if student is married)

How to Calculate Anticipated Income:
Gross year to date wages from most recent pay stubs. Covers 1/1/2018 to _________ = $__________
You must also include copies of the most recent pay stubs for 2018 for each job for all appropriate individuals.

Anticipated work income from (current date) _________ to 12/31/2018.

Amount per week/month $________ times number of remaining weeks/months ______ = $________
(circle one)  (circle one)

If job was lost, do you already have a new job?  ☐ No  ☐ Yes (If yes, make sure to attach most recent check stub)

Other income:
Unemployment Compensation $_______ per week times _______ number of weeks = $________
Severance $_____________

<table>
<thead>
<tr>
<th>ANTICIPATED INCOME 2018 Calendar Year</th>
<th>FATHER</th>
<th>MOTHER</th>
<th>STUDENT</th>
<th>SPOUSE (if student is married)</th>
</tr>
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<tbody>
<tr>
<td>Wages/salaries, (including severance pay, disability payments and any other income from work)</td>
<td></td>
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<tr>
<td>Other taxable income (unemployment compensation, interest/dividend income, etc.) List type(s) of income on attached statement</td>
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<tr>
<td>Child support received</td>
<td></td>
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<tr>
<td>Other untaxed income (payments to tax deferred pension/savings plans, workers compensation, etc.) List type(s) of income on attached statement</td>
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<tr>
<td>TOTAL ANTICIPATED INCOME for 2018</td>
<td></td>
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Section F – Statement of Certification

I/we certify that the information provided on this form and any attachments are true and correct.
Additionally, it is understood that I/we must notify the Department of Financial Aid, Student Employment and Military Education Benefits in writing if the situation outlined in this request changes.

Student Signature                         Date  Parent’s Signature (if dependent)  Date