



**Financial Aid, Student Employment
& Military Education Benefits**
 Mellencamp Hall, Room 162, P.O. Box 469, Milwaukee, WI 53201-0469
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2020-21 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 to more closely reflect 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 changes to your financial aid offer.
- 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:

Fall 2020 – November 23, 2020	Spring 2021 – April 19, 2021	Summer 2021 – June 1, 2021
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Section A – General Information

STUDENT NAME:	STUDENT ID #:
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THESE ITEMS ARE REQUIRED DOCUMENTATION FOR ALL REQUEST TYPES

- **2020-21 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.
- **2018 IRS Tax Return Transcript(s) or SIGNED Federal Tax Return.** If required to file a 2018 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. Include Schedules 1, 2, and 3 if applicable. Include Schedule C, if self-employed. *Please note: **Individuals who did not file a 2018 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 12/31/2018.***

ITEMS BELOW ARE REQUIRED ONLY FOR INDIVIDUAL(S) WITH THE CHANGE(S) IN CIRCUMSTANCE *Note: if student or parent is married, include spouse's information.*

- **2019 IRS Tax Return Transcript(s) or SIGNED 2019 Federal Tax Return** including all relevant schedules. Per the guidelines above, if required to file a 2019 federal tax return, request this document from <http://www.irs.gov/Individuals/Get-Transcript> or provide SIGNED federal tax return.
- **2019 W-2 forms**
- **2019 Schedule 1, 2, and Schedule 3 (if applicable)**
- **2019 Schedule C, if self-employed.**
- Complete and submit this entire form per the instructions with appropriate supporting documentation. See examples on the following page.

Example 1: If adjustment is due to father's loss of job, you will only need to provide parent(s) 2019 IRS tax return transcripts or SIGNED 2019 federal tax return, schedules 1, 2, and 3, if applicable, and W-2 forms. If self-employed, Schedule C.

Example 2: If adjustment is due to student's decrease in income, you will only need to provide student's (and spouse if applicable) 2019 IRS tax return transcripts or SIGNED 2019 federal tax return, schedules 1, 2, and 3, if applicable and W-2 forms. If self-employed, Schedule C.

Section B – Indicate Special Circumstance(s) Below

_____ **A. Unreimbursed medical or dental expenses paid in 2018 or 2019.** Do not include monthly premiums or expenses if claimed as an itemized deduction on Federal Income Tax Returns during 2018 (January 1, 2018 – December 31, 2018) or 2019 (January 1, 2019 – December 31, 2019). As a general rule, these expenses should be at least 15% of your parent(s)' (if dependent) or your Adjusted Gross Income (AGI) in either the 2018 or 2019 tax year before submitting documentation.

Documentation required:

- *Provide an itemized spreadsheet or summary of payments made in 2018 or 2019 (NOT BOTH), and proof of payments made such as statements of accounts or receipts (please total amounts).*

_____ **B. Unreimbursed elementary and/or secondary school tuition** paid or will be paid during the 2020-21 academic year (July 1, 2020 – June 30, 2021).

Documentation required:

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

Section C – Divorced, Separated, or Deceased

_____ **A. If dependent, your parent(s), or if independent, you and your spouse, have become **separated or divorced after submission of your original FAFSA.**** Please provide most recent status below:

Divorced **Date of Divorce:** ____/____/____

Separated **Date of Separation:** ____/____/____

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 bill(s), etc.*
- *If a joint Federal tax return was filed in 2018, submit copies of 2018 W-2 forms and 1099s, if applicable, for both individuals.*

_____ **B. If dependent, your parent(s), or if independent, your spouse, whose 2018 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 2018, submit copies of 2018 W-2 forms and 1099s, if applicable, for both individuals.*

Section D – Reduction of Income (Indicate reason below)

- _____ **A.** If dependent, your or your parent(s)', or if independent, your and your spouse's (if married), **taxable income or untaxed benefits in 2019** (January 1, 2019 - December 31, 2019) **or 2020** (January 1, 2020 - December 31, 2020) **will be at least 15% less than 2018.** Please check specific reason(s) below:

A1 _____ **Received a one-time lump sum payment in 2018** that **will not** be received in future years and was utilized for an unforeseen circumstance. Examples may include severance pay, withdrawals from pensions, IRAs or 401Ks, capital gains, etc.

Documentation required:

- *Signed statement detailing the reason for one-time payment, the amount received, and how the funds were used. If dependent, the statement should be signed by you and at least one parent. If independent, the statement should be signed by you and your spouse, if married.*

A2 _____ **Reduction in income due to being unemployed or a reduction in work status** (i.e. full-time to part-time or under-employed) **in 2019 or 2020.**

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 2019 W-2 forms. If the reduction is for your parent(s), you must submit all 2019 W-2 forms for both parent(s), if they are married. If independent, submit all 2019 W-2 forms for yourself and spouse, if married.*
- *Must provide an estimate of 2020 income following instructions in Section E. **You must also include copies of the most recent pay stubs or statements for 2020 for each job/source of income for all appropriate individuals.***

A3 _____ **Reduction in untaxed income in 2019 or 2020** which could include child support received, disability benefits, etc.

Documentation required:

- *Appropriate documentation showing the amount of the benefit received in 2019.*
- *Statement from the appropriate agency showing the date the benefit was reduced and/or eliminated and the amount to be received in 2020.*
- *Must provide an estimate of 2020 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 2019 or 2020** of at least 15% as compared to 2018.

Documentation required:

- *Signed statement detailing the situation including amounts affected. If dependent, the statement should be signed by you and at least one parent. If independent, the statement should be signed by you and your spouse, if married.*
- *Appropriate documentation from a third-party supporting your statement, if applicable.*
- **2019 IRS Tax Return Transcripts(s) or SIGNED 2019 Federal Tax Return.**
- **2019 W-2 forms**
- **2019 Schedule 1, 2, and 3 (if applicable)**
- **2019 Schedule C, if self-employed**
- *Must provide an estimate of 2020 income following instructions in Section E.*

