

2023-24 Special Circumstance Form

There are cases in which a financial aid administrator may use their professional judgement to review a student's financial aid file and make adjustments that 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 everything at the same time, we will return the forms, which will delay processing.** If you have questions, you can make an appointment to speak with a member of our Advising Staff at uwm.edu/meetfinaid.

Please Note:

- Special circumstances are a one-time occurrence and should only be requested once. In rare cases, a subsequent request may be considered.
- Only undergraduate students should complete this form. Changes in circumstances 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 reach out using our contact information or by making an appointment.
- Submit all documents 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 2023 – November 20, 2023	Spring 2024 – April 15, 2024	Summer 2024 – June 3, 2024
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Section 1 – General Information

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

- **2023-24 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.
- **Either a 2021 IRS Tax Return Transcript(s)** which can be requested from <http://www.irs.gov/Individuals/Get-Transcript> (*completing the FAFSA IRS Data Retrieval is not sufficient*) **OR a SIGNED copy of individual Federal Tax Returns.**
 - ✓ If parent information was included on your FAFSA, include parent tax information as well.
 - ✓ If you are married and filed taxes separately, your spouse's tax information is also needed.
 - Include Schedules 1, 2, and 3 if applicable.
 - Include Schedule C, if self-employed.

*Please note: **Individuals who did not file a 2021 Federal tax return must submit an IRS verification of non-filing letter.** You can find details on the Verification Worksheet mentioned above as well at: uwm.edu/taxes.*

The following tax items are also required, but only for those who have experienced the change/reduction. For example, if the parent(s) had the change in income, we don't need the student tax information for 2022.

- **2022 IRS Tax Return Transcript(s) or SIGNED 2022 Federal Tax Return**
 - 2022 Schedule 1, 2, and Schedule 3 (if applicable)
 - 2022 Schedule C, if self-employed.
- 2022 W-2 forms

Section 2 – Unreimbursed Allowable Expenses

- _____ **A. Unreimbursed medical or dental expenses paid in 2021 or 2022.** Do not include monthly premiums or expenses if claimed as an itemized deduction on Federal Income Tax Returns during 2021 (January 1, 2021 – December 31, 2021) or 2022 (January 1, 2022 – December 31, 2022). 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 2021 or 2022 tax year before submitting documentation.

Documentation required:

- *Provide an itemized spreadsheet or summary of payments made in 2021 or 2022 (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 that will be paid during the 2023-24 academic year (July 1, 2023 – June 30, 2024).

Documentation required:

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

Section 3 – Divorced, Separated, or Deceased since FAFSA Submission

- _____ **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, provide documentation that shows two separate households such as lease(s), mortgage(s), electric bill(s), etc.*
- *If a joint Federal tax return was filed in 2021, submit copies of 2021 W-2 forms and 1099s, if applicable, for both individuals.*

- _____ **B. If dependent, your parent(s), or if independent, your spouse, whose 2021 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 2021, submit copies of 2021 W-2 forms and 1099s, if applicable, for both individuals.*

Section 4 – Reduction to 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 2022** (January 1, 2022 - December 31, 2022) **or 2023** (January 1, 2023 - December 31, 2023) **will be at least 15% less than 2021.** Please check specific reason(s) below:

A1 _____ **Received a one-time lump sum payment in 2021** 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. You and at least one parent should sign the statement if you are dependent.*

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 2022 or 2023.**

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 of your 2022 W-2 forms. If the reduction is for your parent(s), you must submit all 2022 W-2 forms for both parent(s), if they are married. If independent, submit all 2022 W-2 forms for yourself and spouse, if married.*
- **Must provide an estimate of 2023 income following instructions in Section 5. You must also include copies of the most recent pay stubs or statements for 2023 for each job/source of income for all appropriate individuals.**

A3 _____ **Reduction in untaxed income in 2022 or 2023** which could include child support received, disability benefits, etc.

Documentation required:

- *Appropriate documentation showing the amount of the benefit received in 2022.*
- *Statement from the appropriate agency showing the date the benefit was reduced and/or eliminated and the amount to be received in 2023.*
- **Must provide an estimate of 2023 income following instructions in Section 5.**

_____ **B.** **Any other unique situation not listed**, which you feel has resulted in a **reduction of taxed and/or untaxed income in 2022 or 2023** of at least 15% as compared to 2021.

Documentation required:

- *Signed statement detailing the situation including amounts affected. You and at least one parent should sign the statement if you are dependent.*
- *Appropriate documentation from a third party supporting your statement, if applicable.*
- **2022 IRS Tax Return Transcripts(s) or SIGNED 2022 Federal Tax Return.**
 - **2022** Schedule 1, 2, and 3 (if applicable)
 - **2022** Schedule C, if self-employed
- **2022 W-2 forms**
- **Must provide an estimate of 2023 income following instructions in Section 5.**

Section 5 – Estimated Income for 2023 (Complete if required per Section 4)

You must complete the information below detailing anticipated income for 2023 (January 1, 2023 through December 31, 2023).

Reduction in 2023 income applies to: (please check appropriate individuals)

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

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 \$_____ x _____ = \$_____

per week number of weeks total amount

Severance \$_____

In order for our office to estimate 2023 income for the individual(s) selected above, complete the chart below and include supporting documentation as noted. If you are married, you must provide this information for you and your spouse. If the reduction is for your parent(s), provide the information for just your parent(s) and their spouse, if married.

ANTICIPATED INCOME 2023 Calendar Year January 1, 2023 through December 31, 2023	Parent 1	Parent 2	Student	Spouse (if student is married)
Wages/salaries, (including severance pay, disability payments and any other income from work) Submit documentation: <ul style="list-style-type: none"> All final paystubs from all previous employer(s) Most recent pay stubs from current employer(s) Severance pay/Disability payment documentation, if applicable 				
Other taxable income (unemployment compensation, interest/dividend income, etc.) • Submit documentation				
Child support received • Submit documentation				
Other untaxed income (payments to tax deferred pension/savings plans, workers compensation, etc.) • Submit documentation				
TOTAL ANTICIPATED INCOME for 2023				

Section 6 – Statement of Certification

I/we certify that the information provided on this form and any attachments are true and correct. Additionally, we understand 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 Signature (if dependent)** **Date**

NOTE: Signatures cannot be typed or stamped. Must be signature.