

Special Circumstances Form 2008-2009

Name:		
Street Address:		
City:	State:	Zip:
UMID#:	Telephone: ()	

All students who wish to file an appeal based on special circumstances are required to complete verification documents.

Additional information or documentation may be required by the Office of Financial Aid, however, the documents required for all students are:

- **Verification Worksheet for Dependent or Independent Students**
- **Student's (and spouse's, if appropriate) signed 2007 Federal 1040, 1040A, 1040EZ, 1040PC or 1040TEL. The tax form submitted must include the taxpayer's signature, all W-2 forms, and support forms and schedules.**
- **Parents' (if student is dependent) signed 2007 Federal 1040, 1040A, 1040EZ, 1040PC, or 1040TEL. The tax form submitted must include the taxpayer's signature, all W-2 forms, and support forms and schedules.**
- **Documentation of untaxed 2007 income shown on Worksheet A and B of the FAFSA.**
- **Documentation of excluded 2007 income, expenses or credits shown on Worksheet C of the FAFSA.**

Please review the inside of this form to identify the type of special circumstance that you wish to document for financial aid consideration. Each circumstance will list additional documentation required to complete the appeal process. Please submit the completed form with all required documentation. Incomplete applications for special circumstances will not receive consideration. If you find that your special circumstances are not covered by this form, please make an appointment with a financial aid counselor to discuss your situation.

Please check the appropriate circumstance(s) that apply to you and complete the additional requirements needed for that appeal.

High Medical Expenses

Expenses must be at least 7.5% of Adjusted Gross Income (AGI) to meet the minimum threshold for consideration. Eligible expenses also include *paid and non-reimbursed* dental and health care premiums.

√ Submit 2007 Federal 1040 Schedule A showing that the taxpayer met the IRS threshold to deduct these expenses.

√ If the taxpayer did not file a Schedule A, submit a listing of *paid and non-reimbursed* expenses with supporting documentation.

Marital Separation Pending Divorce

Parties must live in separate residences pending divorce action.

√ Submit documentation of separation (legal separation documentation, attorney's letter, or documentation of separate residences).

√ May use estimated income for 2008 by completing the estimated income section on page four of this form.

√ Estimated income filers must submit 2008 income documentation (last pay stub, child support, spousal support, etc.). While spousal support should be included, estranged spouse income should not

or

√ May exclude estranged spouse's income from 2007 base year information.

Private School Tuition

Expenses are restricted to tuition (no books, uniforms, or fees). Expenses taken as childcare elsewhere on tax return are ineligible.

√ Submit a letter from school indicating net tuition (tuition minus scholarships or discounts) for child(ren) in attendance at that school

or

√ Receipts showing amount and date paid. (*All documents should identify the student by name and school.*)

Parent Attending College

Parent must be enrolled at least half-time in a program of study that leads to a degree or certificate (i.e., teaching certification). Undergraduate programs require at least six credit hours each semester and graduate programs at least four credit hours to be considered half-time.

√ Parent must provide a letter from his college stating program of study and when program began or is scheduled to begin.

√ Provide documentation of tuition and mandatory fees (minus any financial aid or employer paid benefits).

Loss of Benefits

Benefits received in 2007 are reduced or lost in 2008.

√ Submit letter of reduction or termination indicating date of loss or reduction.

√ Submit documentation of expected 2008 benefits.

The Office of Financial Aid will accept the expected loss of dependent child's Social Security benefits or the loss of child support because the child reaches 18.

Divorce

Divorced parties must live in separate residences.

√ Submit documentation of divorce.

√ May use estimated income for 2008 by completing the estimated income section on page four of this form.

√ Estimated income filers must submit 2008 income documentation (last pay stub, child support, spousal support, etc.). While spousal support should be included, former spouse's income should not be included

or

√ May exclude former spouse's income from 2007 base year information.

Change in Job Status*

Worked full-time for all or part of 2007 and now work part-time or worked at a higher paying job and now work at a lower paying job.

√ Submit a letter of separation or status change from employer.

√ Complete estimated income section on page four of this form.

√ Submit year-to-date documentation of 2008 income (*most recent pay stubs from all employers*).

The Office of Financial Aid will not consider this circumstance until the job status change has actually occurred.

No adjustments for loss of overtime are considered before 2008 W-2 forms are issued unless the employer issues a written statement that there will be no overtime paid for the year 2008.

Death

Death of parent or spouse

√ Submit copy of death certificate.

√ May use estimated income for 2008 by completing the estimated income section on page four of this form.

√ Estimated income filers must submit 2008 income documentation (last pay stub, life insurance payments, etc.). Only income and benefits of surviving spouse or parent should be used

or

√ May exclude deceased parent's or spouse's income from 2007 base year information.

Separation from Work*

Separated from work because of layoff, termination (voluntary or involuntary) and no longer working.

√ Submit a letter or form documenting separation from employer. Document should include last date of work.

√ Complete estimated income section on page four of this form.

√ Submit year-to-date documentation of 2008 income (last pay stub, FIA, unemployment, Social Security, pension distribution, etc.)

The Office of Financial Aid will not consider this circumstance until separation has actually occurred.

**Normally these categories of appeal are restricted to parents of dependent students and independent students. If you are a dependent student, please make an appointment with a financial aid counselor to determine if you are eligible to file an appeal for job separation in job status*

2008-2009 Statement of Estimated Year Income

Name of Applicant:	
UMID:	Date of Request:
Report annual amounts for the respective periods. <u>DO NOT REPORT MONTHLY AMOUNTS:</u>	
I. Projected Taxable Income:	01/08-12/08
Student's/Father's Wages:	\$ _____
Spouse's/Mother's Wages:	\$ _____
Other Taxable Income:	
Source <u>Unemployment Benefits</u> _____	\$ _____
Source: _____	\$ _____
Source: _____	\$ _____
Total Projected Taxable Income:	\$ _____
II. Projected untaxed income and benefits:	
Source: _____	\$ _____
Source: _____	\$ _____
<p>I, being the undersigned, acknowledge my responsibility to immediately notify the Office of Financial Aid if the above projections become inaccurate. I agree (if asked) to provide a copy of my 2008 federal tax return and/or documentation of untaxed income to verify the above entities. I realize that I will be required to repay all or part of any financial aid received based on inaccurately projected income.</p>	
_____ Student's Signature	_____ Date
_____ Parent's Signature	_____ Date
_____ Spouse's Signature	_____ Date