



Special Circumstances Form 2009-2010

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 2008 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 2008 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 2008 Untaxed Income listed on the FAFSA
- Documentation of 2008 Additional Financial Information listed on the FAFSA

Please describe your special circumstance(s) below. If needed, you may add an additional page.

- 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.
- Students who request a Special Circumstances Appeal for the 2009-10 academic year will be selected for verification in the 2010-11 academic year.
- I, 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 2009 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.

Student's Signature	Date
Parent's Signature	Date
Spouse's Signature	Date

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 2008 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.

* *May submit after completing the FAFSA*

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).

√ Submit documentation of estranged spouse's income to be excluded

* *May submit after completing the FAFSA*

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.*)

**May submit when documentation of enrollment, cost and payments are available.*

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).

**May submit when documentation of enrollment can be officially confirmed.*

It is only necessary to complete the estimated income statement for 2009 on page four if you have lost a job, benefits or experienced a change in job status (full-time to part-time employment).

Death

Death of parent or spouse

- √ Submit copy of death certificate.
- √ Submit documentation of deceased's income to be excluded.

**May submit after completing the FAFSA*

Divorce

Divorced parties must live in separate residences.

- √ Submit documentation of divorce.
- √ Provide income documentation of former spouse to be excluded.

** May submit after completing the FAFSA*

Change in Job Status*

Worked full-time for all or part of 2008 and now work part-time or worked at a higher paying job and now work at a lower paying job.

- √ Submit a letter of status change from employer.
- √ Complete estimated income section on page four of this form and year-to-date documentation of 2009 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 2009.

** Submit on or after June 1, 2009*

Loss of Benefits

Benefits received in 2008 are reduced or lost in 2009.

- √ Submit letter of reduction or termination indicating date of loss or reduction.
- √ Submit documentation of expected 2009 benefits and complete the estimated income section on page four.

** Submit on or after June 1, 2009*

Separation from Work*

Separated from work because of layoff, termination (voluntary or involuntary) and no longer working. The Office of Financial Aid will not consider this circumstance until separation has actually occurred.

- √ 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 2009 income (last pay stub, FIA, unemployment, Social Security, pension distribution, etc.)

** Submit on or after June 1, 2009*

It is only necessary to complete the estimated income statement for 2009 on page four if you have lost a job, benefits or experienced a change in job status (full-time to part-time employment).

