2014-2015 Special Circumstance Review Application

All applicants are required to complete this section. (The application will be returned if all applicable pages are not completed and submitted.)

Student ID #

Student’s Last Name __________________________ Student’s First Name __________________________ Student’s Middle Initial __________________________

Street Address __________________________ City __________________________ State __________________________ Zip __________________________

( ) _____________________________ ( ) _____________________________ ( ) _____________________________

Home Telephone Number Work Telephone Number Other Telephone Number

This application should be used AFTER the 2014-2015 Free Application for Federal Student Aid (FAFSA) has been submitted. Complete this form ONLY if there has been recent unusual or extenuating circumstances, which have caused a significant decrease in your 2013 taxable or non-taxable income.

Each request for a special circumstance review is evaluated on an individual basis. In order to have your award re-evaluated; your initial award must be processed first. The number of special circumstance requests by this office may possibly cause a delay in reviewing your application. The student will be notified by mail of the decision.

Circumstances which might be considered unusual or extenuating may include (but not limited to) the following:

☐ A. Income Reduction

☐ B. Non-elective Medical/Dental expenses (not covered by insurance)

☐ C. Dependent Care expenses for family members with disabilities or handicapped

☐ D. Child Care expenses for Independent students only

☐ E. Unusual debts

☐ F. Professional Licensure

PLEASE NOTE:

1) Submitting a special circumstance review application does not guarantee additional funding.

2) Current or future financial aid could be adjusted/revised if the documentation does not support the claim.

3) The Office of Financial Aid will review accordingly and advise.

Rev. 04/14
A. INCOME REDUCTION
Will your income and/or your parent(s)/spouse’s income be less in the 2013 calendar year than reported on your FAFSA? Select one option.

☐ 1. UNEMPLOYMENT  Effective Date _____________  New Date of Employment _______________

Required Documents:  
- Employment Verification Form (supplied with packet)
- Certification of total 2013 unemployment benefits eligibility
- 2013 earnings up to the last date of employment
- 2013 1040 Tax Return Transcript

☐ 2. CHANGE IN EMPLOYMENT  Effective date ________________

Required Documents:  
- Employment Verification Form (supplied with packet)
- First and/or last date of employment
- 2013 earnings up to the last date of employment
- 2013 1040 Tax Return Transcript

☐ 3. RETIREMENT  Effective date ________________

Required Documents:  
- Employment Verification Form (supplied with packet)
- if military discharge, copy DD214
- First and/or last date of employment
- Retirement statement for 2013
- 2013 1040 Tax Return Transcript
- Certification of unemployment benefits (if applicable)

☐ 4. DIVORCE / SEPARATION  Effective date ________________

Required Documents:  
- Divorce
- Separation
- Copy of divorce decree
- Copy of legal separation or
- Signed copy from attorney indicating date of separation or
- A notarized statement verifying separation
- Rent and/or utility receipts for both parents
- 2013 1040 Tax Return Transcript (both parties)
- 2013 W-2s (both parties)

☐ 5. DEATH  Effective date ________________

Required Documents:  
- Obituary
- Copy of death decree

☐ 6. DISABILITY  Effective date ________________

Required Documents:  
- A letter from the doctor stating the nature and date of disability
- Copy of expected social security benefits for 2014

☐ 7. LOSS OF BENEFITS AND/OR UNTAXED INCOME  Effective date ________________

Child Support □  Alimony □  Workman’s Comp □  Social Security □  Disability □  Other □

Required Document: - Letter certifying appropriate loss on verifying letterhead

☐ 8. DEPENDENCY OVERRIDE

Required Document: Both parents are deceased and/or incarcerated. Documentation must be submitted from an official third party county, state, or federal agency to provide proof of status.
B. NON ELECTIVE MEDICAL/DENTAL EXPENSES  (NOT COVERED BY INSURANCE)

1. How much did you/your parent(s)/spouse pay for medical/dental insurance in 2013?  
   (Do not include employer’s contribution.) $ ___________________

2. Amount paid for 2013 medical/dental expenses NOT paid by insurance.  $_______________________

3. Amount expected to pay for 2014 for medical/dental expenses NOT paid by insurance.  $ ______________

Unusual Medical/Dental Expenses
Medical/Dental expenses up to 11% of the family’s income are already taken into account by the federal need analysis formula when determining financial aid eligibility. Therefore, only the portion of expenses, which exceed 11% will be considered an unusual circumstance.

Required Documentation:  -2013 1040 Federal Tax Return Transcript, Schedule A – Itemized Deductions AND  
                        -Paid receipts of medical and dental payments NOT covered by insurance  
                        (HIGHLIGHT YOUR PORTION OF THE PAYMENT)

C. DEPENDENT CARE EXPENSES FOR FAMILY MEMBERS WITH DISABILITIES AND/OR HANDICAPPED

1. Do you pay for elementary or secondary education expenses for a disabled or handicapped family member?  
   Yes □   No □

   List family member(s) and the amount of expenses for each by completing the grid below:

<table>
<thead>
<tr>
<th>Family Member’s Name</th>
<th>Age</th>
<th>Relationship</th>
<th>Elementary Ed Expense</th>
<th>Secondary Ed Expense</th>
<th>Total 2013 Expenses</th>
</tr>
</thead>
<tbody>
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</table>

2. Do you have dependent care expenses for elderly or disabled family member(s)?   Yes □   No □

   List family member(s) and the amount of expenses for each by completing the grid below:

<table>
<thead>
<tr>
<th>Family Member’s Name</th>
<th>Age</th>
<th>Relationship</th>
<th>Total Care Expenses 2013</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

   Required Documentation:  -2013 1040 Federal Tax Return Transcript and all attachments  
                           -Paid receipts for payments made in 2013  
                           -Letter from caregiver stating amount of payment for the 2013 year

D. CHILDCARE EXPENSES (INDEPENDENT STUDENTS ONLY)

List your child(ren) enrolled in childcare and the amount paid below

<table>
<thead>
<tr>
<th>Family Member’s Name</th>
<th>Age</th>
<th>Total 2013 Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Required Documentation:  -2013 1040 Federal Tax Return Transcript  
                           -Receipts for payments made in 2013  
                           -Letter from daycare provider stating total fees paid by student in 2013
E. UNUSUAL DEBTS

NOTE: Debts like car, mortgage, credit cards and school loans are NOT unusual debts.

1. Did you have unusually high debts or loans due to unemployment, failed business, or emergency medical expenses during 2013 for which you are currently making monthly payments?  □ Yes  □ No

If yes, provide the following information: (NOTE: If additional debts have been incurred, write the information on an additional sheet of paper and attach to this application.)

a. Type or cause of debt: ________________________________________________________________

b. Owed by whom? ___________________________________________________________________

c. Amount of original debt: $ ________________________

d. Date incurred (month/year): ________________________

e. Balance owed on debt: $ ________________________

f. Date payments began (month/year): ________________________

g. Monthly payment: $ ________________________

h. Holder of debt: ___________________________________________________________________

i. Date payments end (month/year): ________________________

j. Will these expenses be higher in 2014? Explain why:
   __________________________________________________________________________________
   __________________________________________________________________________________

k. From what resources will you finance these expenses? _____________________________
   __________________________________________________________________________________

Required Documentation:  -Contract
                          -Lien
                          -Billing or payment summary from person, company, or agency to which debt is owed

F. PROFESSIONAL LICENSURE

Students in a field of study which requires professional licensure (i.e. Law or Accounting) for practice in the profession may submit proof of payment for licensure examination for an adjustment in Cost of Attendance. Only the examination costs may be included; no preparatory costs will be considered.
ESTIMATED INCOME FOR 2014 CALENDAR YEAR
(Please complete applicable sections)

If you (the student) are divorced or separated, include only YOUR income information. If your parents are divorced or separated, include only your custodial parent’s income information. If your custodial parent has remarried, you must include their spouse’s income information. If the loss of income is due to the death of your (the student) spouse/parent, include only YOUR income information or the surviving parent’s income information.

| NOTE: Write in zero (0) if an item does not apply (1/1/2014 – 12/31/2014) |
|----------------------------------|----------------|-------------|-------------|
| Taxable: Wages, Salaries, and Tips | Father | Mother | Student | Spouse |
| State Unemployment Benefits       |         |          |           |         |
| Pension                           |         |          |           |         |
| Alimony                           |         |          |           |         |
| Other (please specify)            |         |          |           |         |
| Non-Taxable: Social Security Benefits |       |          |           |         |
| AFDC                              |         |          |           |         |
| Child Support Received            |         |          |           |         |
| Other Untaxed Income/ Benefits    |         |          |           |         |
| TOTAL ANTICIPATED INCOME          |         |          |           |         |
| Cash & Savings                    |         |          |           |         |

HOUSEHOLD SIZE AND NUMBER IN POST-SECONDARY SCHOOL

This section MUST be completed if your household size or number of family members enrolled in post-secondary education has changed since you completed the original FAFSA.

Write the number of people that your parents (or you and your spouse) will support between July 1, 2014 and June 30, 2015. Include yourself (the student) in this figure. Write in the number of people from the household who will be attending post-secondary school between July 1, 2014 and June 30, 2015. Include yourself (the student) but only include others if they are enrolled on at least a half-time basis in a degree or certificate program.

Total Number of Family Members: ____________________________

Number in College: ____________________________
EXPLANATION OF EXPENSES AND/OR INCOME REDUCTION
(All must complete this section)

Please explain in detail the reason(s) for your request for special consideration. Give details of your income reduction, extenuating circumstances or additional expenses. Provide an additional sheet if necessary.

CERTIFICATION STATEMENT:

** Although your Special Circumstances may be approved, it may not warrant additional aid due to availability of funds.

We certify that the information provided on this form is complete and accurate to the best of our knowledge. If additional changes occur during the 2014-2015 academic year that would alter the information provided on this Special Circumstance Form, we will immediately contact the Financial Aid Office.

Student’s Signature ___________________________ Date __________________________

Spouse’s Signature ___________________________ Date __________________________

(Step) Father’s Signature ___________________________ Date __________________________

(Step) Mother’s Signature ___________________________ Date __________________________

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.
EMPLOYMENT VERIFICATION

Student’s Name ___________________  SSN __________________

Additional information is required in order to further process your request due to loss of employment in your family. Please sign below to authorize release of information and then give this form to your present or previous employer. When the employer completes this form, return it with all other forms to the address below.

If you are not presently employed, when was your last date of employment? ______________________________

<table>
<thead>
<tr>
<th>Employee’s Name (Please Print)</th>
<th>Relation to Student</th>
<th>Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>______________________________</td>
<td></td>
<td>______________________</td>
</tr>
</tbody>
</table>

Employee’s Signature ___________________ Date ______________

EMPLOYER SECTION: TO BE COMPLETED BY EMPLOYER (CURRENT/PREVIOUS)

<table>
<thead>
<tr>
<th>Company’s Name:</th>
<th>Address:</th>
<th>City/State/Zip Code:</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______________</td>
<td>______________</td>
<td>______________________________</td>
</tr>
</tbody>
</table>

Name of person completing this section (Please Print): ______________

Business Telephone: ______________ Fax # ______________ Date ______________

Please complete lines that apply:

The individual name above is/was employed beginning: Month _______ Day _______ Year _______

____________________ Terminated employment Month _______ Day _______ Year _______

____________________ Number of hours worked

____________________ Reason for termination ____________________________________________

____________________ Still employed by the company

____________________ Number of hours per week

Income: Hourly Rate of Pay: _________ Gross Salary $___________ Per _________

TOTAL EARNED YEAR-TO-DATE: $ __________

Signature of person completing this section____________________