2010-2011 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.)

This application should be used AFTER the 2010-2011 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 2009 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. Dependency Override

Current or future financial aid could be adjusted/revised if the documentation does not support the claim.
A. INCOME REDUCTION

Will your income and/or your parent(s)/spouse’s income be less in the 2010 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 2009 unemployment benefits eligibility
- 2010 earnings up to the last date of employment
- 2009 1040 Tax Returns

☐ 2. CHANGE IN EMPLOYMENT  Effective date _______________

Required Documents:
- Employment Verification Form (supplied with packet)
- First and/or last date of employment
- 2010 earnings up to the last date of employment
- 2009 1040 Tax Returns

☐ 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 2010
- 2010 earnings up to the last date of employment
- 2008 1040 Tax Returns
- Certification of unemployment benefits (if applicable)

☐ 4. DIVORCE / SEPARATION  Effective date _______________

Required Documents:
- Divorce
- Copy of divorce decree
- Separation
- 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
- 2009 1040 Tax returns (both parties)
- 2009 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 2010

☐ 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 2009?  
   (Do not include employer’s contribution.) $ __________________________

2. Amount paid for 2009 medical/dental expenses NOT paid by insurance. $_______________________

3. Amount expected to pay for 2010 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: -2009 1040 Federal Tax Return, 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 2009 Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</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 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Required Documentation: -2009 1040 Federal Tax Returns and all attachments  
-Paid receipts for payments made in 2009  
-Letter from caregiver stating amount of payment for the 2009 year

**D. CHILDCARE EXPENSES (INDEPENDENT STUDENTS ONLY)**

List your child/ren enrolled in childcare and the amount paid in grid below

<table>
<thead>
<tr>
<th>Family Member’s Name</th>
<th>Age</th>
<th>Total 2009 Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Required Documentation: -2009 1040 Federal Tax Return  
-Receipts for payments made in 2009  
-Letter from daycare provider stating total fees paid by student in 2009
E. UNUSUAL DEBTS

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

1. Do you have unusually high debts or loans due to unemployment, failed business or emergency medical expenses within 2009 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 2010? 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 who debt is owed
ESTIMATED INCOME FOR 2010 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.

<table>
<thead>
<tr>
<th>Taxable: Wages, Salaries, and Tips</th>
<th>Father</th>
<th>Mother</th>
<th>Student</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Unemployment Benefits</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Pension</td>
<td></td>
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<tr>
<td>Alimony</td>
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<tr>
<td>Other (please specify)</td>
<td></td>
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<tr>
<td><strong>Non-Taxable: Social Security Benefits</strong></td>
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<tr>
<td>AFDC</td>
<td></td>
<td></td>
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<tr>
<td>Child Support Received</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Untaxed Income/ Benefits</td>
<td></td>
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<tr>
<td><strong>TOTAL ANTICIPATED INCOME</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash &amp; Savings</td>
<td></td>
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</tr>
</tbody>
</table>

**NOTE: Write in zero (0) if an item does not apply (1/1/2010 – 12/31/2010)**

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, 2009 and June 30, 2010. 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, 2009 and June 30, 2010. 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 2010-2011 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 ______________________

Spouses 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? __________________________

__________________________________________ __________________
Employee’s Name (Please Print) Relation to Student Social Security Number
__________________________________________                         __________________
Employee’s Signature Date

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

Company’s Name: ________________________ Address: ________________________________

City/State/Zip Code:_____________________________________________________________

Name of person completing this section (Please Print): _________________________________
Title: ______________________________

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

____________________ is 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____________________________

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