



2019-2020 Student Special Circumstances Form
(Forms not accepted until after July 1, 2018)

Student Name: _____ Student ID: _____
Address: _____ Phone: (____) _____
City: _____ State: _____ Zip Code: _____

The Expected Family Contribution (EFC) is calculated to assess the financial strength of a federal student aid applicant. Readily verifiable information from the federal income tax return has proven the most reliable indicator of a family’s available income. For this reason, data from the 2017 tax year is used on the 2019-2020 application. The U.S. Department of Education understands that many conditions could affect the financial circumstances of an applicant after 2017. Using professional judgment, the financial aid administrator may decide on a case-by-case basis to modify data certain data elements in the EFC formula. Any change in these data elements must be adequately documented in the student’s file. Please note that the financial aid administrator’s decision regarding adjustments is final and cannot be appealed to the Department of Education. **INCOMPLETE FORMS WILL NOT BE PROCESSED.**

INSTRUCTIONS

1. Complete this form in its entirety.
2. Provide a signed copy of student/spouse 2017 federal tax return(s) with W-2 forms
3. Provide documentation of year-to-date earnings (last/most recent pay stub) or unusual expenses.
4. Submit the completed form and all required documentation to the Financial Aid Office.
5. Please allow up to 6 weeks for a response on your appeal.

Check Here If you did Not and Will Not File A 2017 Federal Tax Return.

The special circumstance requiring review occurred to: Student Spouse of Student

Reason for the change in income or expenses:

This change can be from 2017 to 2018, or 2017 to 2019. Please provide the documentation accordingly.

Loss of income from work (complete 2018 Projected Income Table on back of form)

Period of Unemployment: _____ to _____

- Layoff (minimum of 10 continuous weeks) – Provide a letter on letterhead from employer stating effective date and anticipated return.
- Plant Closing – Provide a letter on letterhead from employer stating effective date.
- Termination – Provide letter on letterhead from employer or unemployment office stating effective date.
- Disability – Date of disability: _____. Attach appropriate documentation.
- Other – Provide information in the explanation section on the back of this form.

Loss of other income (complete 2018 Projected Income Table on back of form)

- Alimony – Provide court document stating termination and date of benefit.
- Unemployment compensation – Provide letter from unemployment office stating termination date of benefit.
- Other – Provide information in the explanation section on the back of this form.

Separation or Divorce

Date of separation or divorce: _____
Provide a copy of separation papers or divorce decree.

Death of Spouse

Date of death: _____
Provide a copy of death certificate

One-time income (inheritance, moving expense allowance, lump sum retirement distribution, etc.) You must attach a separate sheet that identifies the source of the one-time income and how the funds were spent or invested.

[] **Unusual expenses paid** (medical or dental expenses) You must provide documentation of the type and amount of expenses **paid** during 2018 and amounts remaining to be paid during the 2019-20 school year. Also provide documentation of any amounts paid by insurance. *Complete reverse side also*

**2018 Projected Income – Provide documentation of year-to date earnings
(last/most recent pay stub)**

Depending on your circumstance, this may be completed as a 2019 Projected Income

INCOME JANUARY 1, 2018 TO DECEMBER 31, 2019	Actual Income 1/1/18 to Today	Est. Income Today to 12/31/19	For Office Use Only
Student's 2018 gross income from work (wages, salary, tips)			
Spouse's 2018 gross income from work (wages, salary, tips)			
Draws from self-employment			
Withdrawals from retirement accounts			
Unemployment benefits received 2018			
Social security /Disability Income – all family members			
Pension, Alimony, etc			
TANF (Temporary Assistance for needy families)			
Child support received			
Other			
Total Income for 2018			

Explanation Section: Please summarize your special circumstances below. Attach an additional sheet if needed.

REVIEW CHECKLIST

Did you include all of the required documents?

- Student & spouse signed 2017 federal tax return with all schedules and W-2s
- Paid receipts of reported expenses, if applicable
- Other required documentation and/or letters

CERTIFICATIONS:

My signature below certifies that the information provided on this form is true. I understand that the penalty for providing false or misleading information to be used on the FAFSA (Free Application for Federal Student Aid) will be cause for repayment of financial aid funds received as well as a \$20,000 fine, a prison sentence, or both.

Signature of Student

Date