



2020-2021 Financial Aid Special Circumstance Review

Student Name _____ Student ID # _____ Phone # _____

1. Whose income will be less in 2019 or 2020 than it was in 2018? - student / spouse / father / mother
2. Which year of the income would you like to use for special circumstance review? 2019 _____ / 2020 _____
 To use 2019 income for the review, please attach a copy of the 2019 tax transcript from IRS.
 To use 2020 income for the review, please complete the 2020 projected income and attach the supporting documents.

3. Please **select the appropriate reason**, enter **date of change**, and **attach documents to support your calculation**.

For each item, refer to the back of the page for recommended documentation.

- | | Month | Day | Year |
|--|----------------|-------|-------|
| a. <input type="checkbox"/> Unemployment and receiving unemployment benefit on | _____ | _____ | _____ |
| b. <input type="checkbox"/> Divorce/separation | _____ | _____ | _____ |
| c. <input type="checkbox"/> Death of spouse or parent | _____ | _____ | _____ |
| d. <input type="checkbox"/> Disability of student, spouse, or parent | _____ | _____ | _____ |
| e. <input type="checkbox"/> One-time income and not available for educational expenses | _____ | _____ | _____ |
| f. <input type="checkbox"/> Loss of benefits (Unemployment or disability benefit ended) | _____ | _____ | _____ |
| g. <input type="checkbox"/> Elementary/Secondary school expenses | Total \$ _____ | | |
| h. <input type="checkbox"/> Unreimbursed medical expenses | Total \$ _____ | | |
| i. <input type="checkbox"/> Other (explain in the back) | | | |

2020 projected Income	Income received from (Wages, Salaries, severance pay, disability, unemployment benefits, untaxed SS, Child support and other untaxed income...)	Student / Spouse	Parent(s) Father / Mother
Year-to-date earnings			
Projected Income (Unemployment benefit, pension or 3 current paystubs ...)			
Total 2020 Projected Income			

All of the above information is true and complete to the best of my knowledge.

Date _____ Student Signature _____

***** For Office Use Only *****

Approved: _____

History correction: _____

Waived : _____

Still Not Eligible _____

Comments:

Date :	FAO Signature:
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Guidelines for Special Circumstances

*** Student can decide whether to use 2019 income or 2020 projected income for special circumstance review. Should you decide to use 2019 income, you will provide a copy of the 2019 tax return transcript from IRS or copy of your 1040 with schedules. Should you decide to use 2020 projected income, please follow the instructions below -

	Category	Condition	Documentation
a.	UNEMPLOYMENT OR REDUCTION OF WAGES	Student, spouse, or parent who earned money in 2018 has lost his/her job in 2019 or 2020. Student, spouse, or parent who worked full time in 2018 is not working full time now.	The last paystub showing YTD earnings, letter of unemployment showing approval/denial of benefits, unemployment online screen print, or 2019 tax return. Three pay stubs showing hours worked, pay rate, YTD earnings from all jobs held in 2020, or 2019 tax return.
b.	SEPARATION OR DIVORCE	Student or parents have separated or divorced in 2020	Copy of Divorce Decree, Separation agreement, proof of separate addresses, (i.e. rental contracts and/or utility bills)
c.	DEATH	Spouse or parent who worked in 2018 has died	Death certificate, proof of income generated by the deceased.
d.	DISABILITY	Student, spouse or parent has been unable to earn money in the usual way due to disability	Proof of disability, proof of YTD earnings, pay stubs of disability checks
e.	ONE-TIME INCOME	Student, spouse, or parent received income in 2018 which cannot reasonably be expected to be received in 2020 and the funding is not available for educational expenses	Proof of the nonrecurring nature of the income such as gain from sale of home to purchase another, a 401K or IRA transfer or rollover, plus current status of the funds (deposited, spent, etc.).
f.	LOSS OF TAXABLE OR UNTAXED BENEFITS	Student, spouse, or parent who received unemployment benefits or some untaxed income or benefit in 2018 have lost that income in 2020	Letter/notice from agency indicating benefits have been terminated. Unemployment online screen print.
g.	ELEMENTARY/SECONDARY SCHOOL EXPENSE	Student or parent is paying for elementary or secondary school tuition for your children or your siblings in 2020.	An itemized bill or copy of contract from school with proof of payment such as cancelled checks.
h.	UNREIMBURSED MEDICAL EXPENSES	Student or parent paid medical/dental bills not covered by insurance in 2020.	Attach cancelled checks or receipts to a summarized list with dates and amounts.

Explanation: