



## Scholarship and Financial Aid Office Special Circumstances Form 2024-25

Students whose family experiences a change in financial circumstances that will lower family resources from 2022 to 2023 may be eligible for a recalculation of their aid eligibility based on estimated or actual 2023 income. In order to be considered for a special circumstances calculation, students and their families must meet specific guidelines and **provide documentation of the change.**

### NO DOCUMENTATION = NO ADJUSTMENT

All applicants must still complete the 2024-25 **Free Application for Federal Student Aid.** This Special Circumstances Form is used to determine if the circumstances warrant an adjustment to your UDM financial aid award.



- 1) **Submit a letter** explaining the decrease of income. Be specific about the circumstances. Include dates, amounts, etc. Some examples of situations that warrant a re-evaluation include:
  - Loss of employment for parent or student/spouse for 10 weeks or more. Overtime is excluded.
  - Divorce or separation
  - Death of parent or spouse
  - Loss of untaxed income or benefit
  - Illness/Disability
  - Unusually high child-care costs (over \$1000/month; document)
  - Unusual medical or dental expenses not covered by insurance
  - Tuition payments for siblings in kindergarten through 12th grade during January-December 2023  
**(If this is your only special circumstance you need to complete the Sibling Tuition Payment Form only. This form is available online at [udmercy.edu/apply/financial\\_aid/forms](http://udmercy.edu/apply/financial_aid/forms).)**
- 2) **Attach documentation.** For loss of job, a letter **from the employer** stating employment dates, total earnings, estimated pension, and/or severance pay amount. For separation or divorce, documentation from a court, attorney, minister (for annulment) is appropriate. Provide documentation of other situations as appropriate (doctor's certificate of disability, death certificate, tuition or medical bills or letters from school or doctor, etc.)
- 3) **Complete the 2024-25 Verification Worksheet**
- 4) If you have completed your 2023 taxes, please provide a 2023 tax return transcript. If you have not filed your taxes, **estimate your total income for 2023** from all sources. Do not leave blank. **(Documentation Required)**

Annual Income	Parent/Spouse	Student
Income earned from work		
Interest and dividends		
Unemployment Compensation		
Alimony, Capital Gains		
Rents, Royalties, Partnerships, Estates, Trusts, Business/Farm Income		
Taxable portions of pensions, annuities, social security, RRTAs, early withdrawals from IRAs, etc.		
All other taxable income		
Untaxed income (social services benefits, earned income credit; worker's compensation; untaxed interest, dividends, capital gains, social security, RRTA, etc.; insurance settlements, 401(k) or 403(b) plans, child support, housing, food and living allowances, and all other untaxed income.		
Deductible IRA or Keogh payments		
Alimony or child support paid out		



Name of Student \_\_\_\_\_ SSN/Student No. \_\_\_\_\_ Date \_\_\_\_\_

Signatures: Student: \_\_\_\_\_ Parent: \_\_\_\_\_

## 2024-25 Special Circumstances Form (Loss of Employment/Wages) Documentation Checklist

- \_\_\_\_\_ 2024-25 Special Circumstances Form
- \_\_\_\_\_ Letter from Student/Parent explaining the financial circumstances
- \_\_\_\_\_ 2024-25 Verification Worksheet
- \_\_\_\_\_ 2023 Federal Tax Return TRANSCRIPT\* or estimated income if not available
  -  Student (if the student filed a 2023 Federal tax return)
  -  Parent

### *If applicable*

- \_\_\_\_\_ Letter from Employer confirming loss of employment/wages
- \_\_\_\_\_ 2022 Federal Tax Return TRANSCRIPT if IRS DDX was not used on the 2024-25 FAFSA and manual tax information was used
  -  Student (if the student filed a 2022 Federal tax return)
  -  Parent
- \_\_\_\_\_ Last Pay Stub (For everyone who filed a 2022 federal tax return)
- \_\_\_\_\_ Copy of all 2022 and 2023 W2's to verify all household income
- \_\_\_\_\_ Unemployment Contract
- \_\_\_\_\_ Severance Pay Letter/Contract