

VINCENNES UNIVERSITY
2018-2019 SPECIAL CIRCUMSTANCES REQUEST
FOR AN INDEPENDENT STUDENT

Financial Aid Office
 1002 North First Street,
 Vincennes, IN 47591
 Ph: 812-888-4361 * Fax: 812-888-4261

Use this form to report recent changes to your or your spouse's financial situation which may impair your ability to contribute toward the cost of your education in 2018-2019 (Fall 2018 through Summer 2019).

Deadlines: Fall only enrollment: Form and documents must be submitted before November 01, 2018.

Spring only, academic year, or summer enrollment: Form and documents must be submitted by April 01, 2019.

STEP 1: Contact Information

University I.D.#: A00 _____ Valid Email: _____

Student Name: _____

Address: _____ Home Phone:(_____)_____

City: _____ State: _____ Zip: _____ Cell Phone:(_____)_____

STEP 2: Understanding the Purpose of this Request

Your 2018-2019 financial aid is based on 2016 income and tax information. This form provides guidance on how you can document certain changes in your financial circumstances since 2016. This might allow us to reduce certain data elements on your FAFSA that may provide a result (EFC) that more accurately and fairly reflects your current financial situation. The list on the second page provides the most common circumstances that allow us to make this professional judgment. You may check with a financial aid counselor if you have other circumstances that might affect the amount you and your family are expected to contribute. We have to have very good reasons to make any adjustments, and not all adjustments will change your financial aid eligibility.

The documentation we ask for is necessary because federal student aid regulations require our office to show why we adjust any figures that go into calculating the EFC. Please submit all requested documentation with the form. Additional information may be requested upon review of your request. The Special Circumstance process is optional and may take several weeks to process. Our committee's decision is final and cannot be appealed to the U.S. Department of Education.

Incomplete requests will not be processed.

While a decision is pending on your case, you can receive the type and amount of aid indicated on your MyVU account. If you accept loans, and then end up not needing them, we can return these without penalty to you. Submission of this form does not guarantee approval or increased financial aid eligibility, and any increase may not cover the full costs incurred at Vincennes University.

You are responsible for making payments or arrangements to pay on your account while your request is being processed.

We will NOT consider requests for any of the following circumstances:

- Bankruptcy
- Loss of overtime or bonus pay
- One-time income, gained through an inheritance, gambling or lottery winnings, or early withdraw from retirement plan, used for the following:
 - Non-essential expenses (vacation, tithing, charitable giving, high mortgage payments, etc.)
 - Standard living expenses (utilities, cable bills, credit card payments, cell phone, vehicles, tax bills, etc.)
 - Standard maintenance items (lawn care, home repairs, gas, etc.)

By signing this appeal form, I certify all information is true and complete to the best of my knowledge. I agree to provide all documentation and information that will verify the accuracy of my appeal. I understand that if I purposely give false or misleading information, I may be fined \$10,000, receive a prison sentence, or both. I understand that I am responsible for payment of my account.

Student Signature: _____

Date: _____

STEP 3: Special Circumstances Documentation

Mark the appropriate area(s) based on your reason for completing this form.

Note: We have the right to request additional documentation as necessary to process this request.

_____ *Loss of income/Significant decrease of income*

_____ *Loss of alimony or child support*

_____ *Loss of other benefits: enter type of benefits _____*

In which year did it occur? Circle one 2017 OR 2018

REQUIRED DOCUMENTATION

- ✓ A typed letter, signed and dated, by you explaining the reason for your request.
- ✓ Completed 2018-2019 Independent Verification Worksheet, if you have not already submitted.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2016 tax return transcripts*.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2016 W-2s and 1099s.
- ✓ Proof of all earnings **for the person(s) who is losing or lost income.**
 - If 2017, provide a signed copy of 2017 tax return transcripts along with all 2017 W-2 and 1099 forms.
 - If 2018, provide last pay check stub from previous employer(s), printout of Unemployment benefits, most recent pay check stub if currently employed at a new job. As well as, a written projection of income for the remainder of 2018. Provide any additional documentation that supports your income projection.
- ✓ If loss of Employment: A letter on company letterhead signed and dated by employer indicating last day of employment. If you do not have such a letter, include the date of loss of job in your letter of explanation.
- ✓ If alimony or child support ended: Court document stating date of termination of benefit, and amount received.
- ✓ If loss of other benefits: Provide documentation that explains the change in income in the most recent 12 months. Provide a letter stating the termination date of benefits, and the total amount received.

_____ *Legal Separation or Divorce after filing the FAFSA*

REQUIRED DOCUMENTATION

- ✓ A typed letter, signed and dated, by you explaining the reason for your request.
- ✓ Completed 2018-2019 Independent Verification Worksheet, if you have not already submitted.
- ✓ If you have not already done so, submit a signed copy of your 2016 tax return transcripts*.
- ✓ If you have not already done so, submit copies of ALL your 2016 W-2s and 1099s.
- ✓ Date of Legal Separation or Divorce: _____
- ✓ Copy of legal separation papers, divorce decree, or letter of intent from attorney on attorney's letterhead.

_____ *Death of Spouse after filing the FAFSA*

REQUIRED DOCUMENTATION

- ✓ A typed letter, signed and dated, by you explaining the reason for your request.
- ✓ Completed 2018-2019 Independent Verification Worksheet, if you have not already submitted.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2016 tax return transcripts*.
- ✓ If you have not already done so, submit copies of ALL 2016 W-2s and 1099s.
- ✓ Copy of Death Certificate.

_____ *Natural Disaster*

Family has incurred extraordinary non-reimbursed living expenses and repair expenses since 2016 due to a disaster. Examples include tornado, flood, fire, storm damage.

REQUIRED DOCUMENTATION

- ✓ A typed letter, signed and dated, by you explaining the reason for your request.
- ✓ Completed 2018-2019 Independent Verification Worksheet, if you have not already submitted.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2016 tax return transcripts*.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2016 W-2s and 1099s.
- ✓ Insurance claims/denial.
- ✓ Receipts for damage and repair costs as well as extra living expenses paid in 2016 or 2017.

Significant Medical Expenses **Nursing Home expenses** **Dependent Care expenses**

2016 Expenses being claimed must have been paid out-of-pocket by the student and/or spouse. Expenses covered by insurance or reimbursed by a third party cannot be submitted for consideration. In addition, FAFSA already calculates an 11% Income Protection Allowance(IPA) for families. Therefore, these expenses must be over this 11% IPA to be considered.

REQUIRED DOCUMENTATION

- ✓ A typed letter, signed and dated, by you explaining the reason for your request.
- ✓ Completed 2018-2019 Independent Verification Worksheet, if you have not already submitted.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2016 tax return transcripts*.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2016 W-2s and 1099 forms.
- ✓ Copy of Schedules A and B from your 2016 Federal tax returns.
- ✓ Itemized listing of all medical/care expenses paid by student and/or spouse.
- ✓ Copies of insurance benefit statements or other third party payments and receipts related to the expenses to be considered.

 Other _____

NOTE: A Special Circumstance Request will NOT be processed for any of the following:

- ✗ Bankruptcy
- ✗ Loss of overtime or bonus pay
- ✗ One-time income gained through an inheritance, gambling or lottery winnings, or early withdraw from retirement plan, that is used for the following:
 - ⊗ Non-essential expenses (vacation, tithing, charitable giving, high mortgage payments, vehicles, tax bills, etc.)
 - ⊗ Standard living expenses (utilities, cable bills, credit card payments, cell phone, etc.)
 - ⊗ Standard maintenance items (lawn care, home repairs, gas, etc.)

REQUIRED DOCUMENTATION

- ✓ A typed letter, signed and dated, by you explaining the special circumstance you want us to consider.
- ✓ Completed 2018-2019 Independent Verification Worksheet, if you have not already completed.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2016 tax return transcripts*.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2016 W-2s and 1099 forms.
- ✓ Detailed documentation supporting your request.

***TO ORDER A TAX RETURN TRANSCRIPT or VERIFICATION OF NON-FILING LETTER**

To obtain 2016 tax return transcripts or a 2016 Verification of Non-filing letter, visit www.irs.gov/Individuals/Get-Transcript. You can request the form to be mailed to you (this can take up to 10 calendar days) or create an online account to obtain a .pdf to download and print. You may also request any transcript by faxing/ mailing Form 4506-T to IRS.

If you and/or spouse were not required to file taxes in 2016, a Verification of Non-filing letter from the IRS is required for each individual.