



# 2019-2020 Special Circumstance Application



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**Must Complete in Black or Blue Ink Pen.**

**ORIGINAL DOCUMENT IS REQUIRED. WE CANNOT ACCEPT FAXES OR EMAILS.**

## A. Student Information

_____			_____
<i>Last Name</i>	<i>First Name</i>	<i>M.I.</i>	<i>Social Security Number</i>
_____			_____
<i>Address (include apartment number)</i>			<i>MC Student ID#</i>
_____			_____
<i>City</i>	<i>State</i>	<i>Zip Code</i>	<i>Phone Number (best b/t 8 AM – 5 PM)</i>
_____			_____
<i>Email Address</i>			<i>Date of Birth</i>

## B. Instructions and Information

This application may be completed if your family’s financial situation has significantly changed from the previous calendar year (information that was reported on your FAFSA to the current calendar year).

Federal regulations provide financial aid administrators the authority to make adjustments to the information provided on the FAFSA when special circumstances exist. Such circumstances include:

- Loss of Employment or Reduced Income
- Separation or Divorce
- Death of a Parent or Spouse
- Extraordinary Medical Expenses
- One-Time Increase in Income
- Dependency Status Change

No applications will be considered until your FAFSA has been processed by our office. If you have not completed the online FAFSA, please do so as soon as possible.

**PLEASE NOTE: if you choose to quit your job to return to school this is NOT a special circumstance.**

## C. Required Documents

All applications must include the following:

- 2017 and 2018 W-2’s for the student or parent (*if dependent*) that is applying for a Special Circumstance
- 2017 and 2018 Tax Return Transcript for the student or parent (*if dependent*) that is applying for a Special Circumstance, even if the Data Retrieval Tool was used to complete the FAFSA
  - Can only be obtained directly from the IRS at [www.irs.gov/transcript](http://www.irs.gov/transcript) or by calling (844) 545-5640 (TAX RETURNS CANNOT BE ACCEPTED)
- Proof of all other untaxed or taxed income
  - Child support, retirement benefits, unemployment benefits, disability benefits, severance pay, etc....
- Summary statement of student or parent special circumstance
- Additional documents listed under each particular circumstance

## D. Circumstance

### **Loss of Employment or Reduced Income** – ADDITIONAL REQUIRED DOCUMENTATION BELOW

**Since applying for financial aid, Student/Spouse/Parent(s) experienced a loss of/change in employment or a drastic change in income.**

Name of person that lost job: \_\_\_\_\_

Relationship to Student:  Student  Spouse  Parent 1  Parent 2

Name of Previous Employer: \_\_\_\_\_

Last Date of Employment: \_\_\_\_\_ Status:  Full-time  Part-time

Has new employment been found?  Yes  No If so, start date \_\_\_\_\_

Name of New Employer: \_\_\_\_\_

Untaxed Income Loss: \_\_\_\_\_ If any, when? \_\_\_\_\_

Unemployment Benefits:  Yes  No If so, start and end date \_\_\_\_\_

Retirement Benefits:  Yes  No If so, start and end date \_\_\_\_\_

Disability Benefits:  Yes  No If so, start and end date \_\_\_\_\_

Name of Person receiving benefits: \_\_\_\_\_

Relationship to Student:  Student  Spouse  Parent 1  Parent 2

- Official evidence of job loss
- Letter from individual's previous employer stating last date of employment and year-to-date income **OR** Copy of last pay check stub with year-to-date income information
- Documentation in reduction in work and/or work hours
- Verification of start and end date of unemployment benefits for 2017 and 2018
  - Initial letter from the Texas Workforce Commission
  - Printout of all benefits by month statement
- Verification of start date of retirement benefits for 2017 and 2018
- Verification of start date of disability benefits for 2017 and 2018
  - Initial letter from Social Security
  - Printout of all benefits by month statement
- Verification of loss of untaxed income loss for 2017 and 2018
  - Social Security letter, with printout of benefits
  - Loss of child support for minor child, printout of all income received

### **Previous Year One-Time Increase in Income Amount** – ADDITIONAL REQUIRED DOCUMENTATION BELOW

**Student/Spouse/Parent(s) received an inheritance, lump sum Social Security payment, a retirement or IRA distribution or some other nonrecurring payment that is not available for the current school year.**

Type of Payment Received: \_\_\_\_\_ Date received? \_\_\_\_\_

- Official documentation that identifies the source of income (legal forms, financial statements, etc.)
- Documentation of how the funds were spent or invested and why they are not available as a resource

### **Death of Parent(s) or Spouse** – ADDITIONAL REQUIRED DOCUMENTATION BELOW

**Since applying for financial aid, your Parent(s) or Spouse has passed away.**

- Copy of death certificate
- Copy of most recent paycheck stub for student and surviving parent (*if applicable*)
- Billing statement from funeral home verifying expenses not covered by insurance (*if applicable*)

- Unusually High Medical or Dental Expenses** – ADDITIONAL REQUIRED DOCUMENTATION BELOW  
Since applying for financial aid, Student/Spouse/Parent(s) are experiencing unusually high medical or dental expenses (adjustments are on assets only).
- Schedule A for 2017 and 2018
    - The federal formula used to calculate an EFC allows for 11% of a family's adjusted gross income to be allocated for medical expenses. **Only medical expenses in excess of 11% may be considered.**
  - Receipts for medical payments not covered by insurance, for 2017 and 2018
    - Statements must show name of patient(s), dates of charges and amounts paid by patients
- Documents need to be sorted and submitted by patient (if medical is for more than one family member) and in chronological order. Please make sure not to send duplicates of expenses. Documents not dated or dated outside of the 2017 and 2018 years will not be accepted.

- Divorce or Separation** – ADDITIONAL REQUIRED DOCUMENTATION BELOW  
Since applying for financial aid, you/your parents have become divorced or separated.
- Name of Parent on FAFSA: \_\_\_\_\_
- Has the Parent of record Remarried?  Yes  No Anniversary Date: \_\_\_\_\_
- Copy of the divorce decree or the divorce petition verifying separation
  - If divorce is not final, you must sign and have notarized the Affidavit of Separation found in the Financial Aid Office
  - Verification of child support received, for both 2017 and 2018

- Dependency Override** – ADDITIONAL REQUIRED DOCUMENTATION BELOW  
Student's dependency status is determined by the questions found in Step three of the FAFSA.

Students with the following situations **DO NOT** qualify for a dependency override.

- Parents refuse to contribute to the student's education.
- Parents are unwilling to provide information on the FAFSA or for verification.
- Parents do not claim the student as a dependent for income tax purposes.
- Student demonstrates total self-sufficiency.

You are requesting this dependency status change due to one of the following reasons:

- Deceased Parents – Copy of death certificate(s)
- Legal Guardianship – Copy of court order documentation
- Relationship with parent is severed – Letter explaining the situation and documentation
- Other – Letter explaining the circumstance and documentation

The following documents are required for a dependency status change:

- Formal statement from student detailing current circumstances (Must be typed, signed by you and attached to this form)
- Reference forms from different sources (Must be completed and signed by each individual)
  - References **MUST BE** someone other than family member or friend (teacher, counselor, medical authority, member of clergy, prison administrator, government agency or court)
- Signed copy of lease or verification of payment arrangements (canceled checks, etc.)
- Copy of most recent check stub with year-to-date earnings
- Proof of health and auto insurance

## E. Verification

**1. What is your dependency status?**

- Dependent  Independent

**2. Verification of Household**

- Yourself
- List Spouse and/or your Dependents (*if applicable*)
- **For Dependent Students:** List your parent(s). In case of divorce/separation, list the parent with whom you lived with more during the past 12 months. If this parent is remarried, you must include your step-parent.
- **For Dependent Students:** List your parent(s)' other children-
  - i. If they will provide more than half of their support from July 1, 2019 through June 30, 2020.
  - ii. If they would be required to provide parent information if they were completing the 2019-2020 FAFSA
  - iii. **DO NOT** include siblings who are in U.S. military service academies
- Include the name of the college for any household member who will be attending college at least half-time between July 1, 2019 and June 30, 2020 and will be enrolled in a degree, diploma or certificate program. If your parent(s) are also attending college, do not write the name of the college they are attending.

Full Name	Age	Relationship	College
		<i>Self</i>	<i>Midland College</i>

*If you need additional space, please attach a separate page.*

## F. Signature

By signing this worksheet, I verify that all the information reported is complete and correct. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both. Dependent students must have parent(s') signatures.**

Student Signature	Date	Parent 1 Signature	Date
Spouse Signature	Date	Parent 2 Signature	Date

## G. Review Statement (For Office Use Only)

Calculation of Taxable Income and Taxes Paid		Amount
A. Total Income	=	
B. Standard Deduction: Single: \$6,350; HoH \$9,350; MFJ \$12,700	=	
C. Exemptions      Number _____ x \$4050	=	
D. Taxable Income	A-(B+C) =	
Tax Paid from Table		

\_\_\_\_\_ Approved      \_\_\_\_\_ Denied      \_\_\_\_\_ Will not Benefit

FAO Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_