

VINCENNES UNIVERSITY
**2019-2020 SPECIAL CIRCUMSTANCES REQUEST
 FOR AN INDEPENDENT STUDENT**

Student Financial Services 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 2019-2020 (Fall 2019 through Summer 2020).

Deadlines: Fall only enrollment: Form and documents must be submitted before November 1, 2019.

Spring only, academic year, or summer enrollment: Form and documents must be submitted by April 3, 2020.

STEP 1: Contact Information

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

Student Name: _____

Address: _____ Home Phone:(_____) _____

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

STEP 2: Understanding the Purpose of this Request

Your 2019-2020 financial aid is based on 2017 income and tax information. This form provides guidance on how you can document certain changes in your financial circumstances since 2017. This might allow us to reduce certain data elements on your FAFSA and may provide a result (Estimated Family Contribution) which 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 must have documentable circumstances to make adjustments. Not all adjustments will change your financial aid eligibility.

Federal student aid regulations require our office to document why we adjusted the data elements that go into re-calculating your EFC. Please submit all required documentation with this 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.**

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. While a decision is pending on your case, you can receive the financial aid indicated on your MyVU account.

**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 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 request. I understand that if I purposely give false or misleading information, I may be prosecuted by the Department of Education. **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 2018 OR 2019

REQUIRED DOCUMENTATION

- ✓ A typed letter signed and dated by you explaining the reason for your request.
- ✓ If you have not already done so, submit a completed 2019-2020 Independent Verification Worksheet.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2017 federal tax return.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2017 W-2s and 1099s.
- ✓ Proof of all earnings **for the person(s) who is losing or lost income.**
 - If 2018, provide a signed copy of 2018 federal tax return along with all 2018 W-2 and 1099 forms.
 - If 2019, 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 2019. 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 and the total 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. Include the date you were legally separated, divorced, or no longer living in the same home with your estranged spouse.
- ✓ If you have not already done so, submit a completed 2019-2020 Independent Verification Worksheet.
- ✓ If you have not already done so, submit a signed copy of your 2017 federal tax return.
- ✓ If you have not already done so, submit copies of ALL your 2017 W-2s and 1099s.
- ✓ 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.
- ✓ If you have not already done so, submit a completed 2019-2020 Independent Verification Worksheet.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2017 federal tax return.
- ✓ If you have not already done so, submit copies of ALL 2017 W-2s and 1099s.
- ✓ Copy of Death Certificate.

_____ *Natural Disaster*

Family has incurred extraordinary non-reimbursed living expenses and repair expenses since 2017 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, including date event occurred.
- ✓ If you have not already done so, submit a completed 2019-2020 Independent Verification Worksheet.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2017 federal tax return.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2017 W-2s and 1099s.
- ✓ Receipts for damage and repair costs as well as extra living expenses paid.
- ✓ Insurance claims/denial.

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

Please circle the year out-of-pocket expenses were paid? 2017 OR 2018

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.
- ✓ If you have not already done so, submit a completed 2019-2020 Independent Verification Worksheet.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2017 federal tax return.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2017 W-2s and 1099 forms.
- ✓ If expenses were paid in 2017, submit copies of all schedules filed with the 2017 Federal tax returns.
- ✓ If expenses were paid in 2018, submit a signed copy of your (and spouse's) 2018 federal tax return and copies of all schedules filed with your 2018 Federal tax returns.
- ✓ Submit an itemized listing of all medical/care expenses paid by student and/or spouse.
- ✓ Submit copies of insurance benefit statements or other third party payments and receipts related to the expenses to be considered.

_____ *Other* _____

In which year did it occur? Circle one 2018 OR 2019

Remember: 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.
- ✓ If you have not already done so, submit a completed 2019-2020 Independent Verification Worksheet.
- ✓ If you have not already done so, submit a signed copy of your (and spouse's) 2017 federal tax return.
- ✓ If you have not already done so, submit copies of ALL your (and spouse's) 2017 W-2s and 1099 forms.
- ✓ Detailed documentation supporting your request.

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

If you do not have copies of required federal tax forms, you may request tax return transcripts online. To obtain federal tax return transcripts or a 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 2017, a Verification of Non-filing letter from the IRS is required for each individual. If you are unable to obtain this letter, please contact our office for assistance.