



**Scholarship and Financial Aid Office  
Special Condition Form  
2018-2019**

Students whose family experiences a change in financial circumstances that will lower family resources from 2016 to 2017 may be eligible for a recalculation of their aid eligibility based on estimated 2017 income. In order to be considered for a special condition 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 2018-2019 Free Application for Federal Student Aid. This Special Condition 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 2015.  
**(If this is your only special condition, 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 2018-2019 Verification Worksheet and provide a copy of the 2016 IRS Tax Return Transcript for parent(s) and student, if applicable.**
- 4) If you have completed your 2017 taxes, please provide a 2017 tax return transcript. If you have not filed your taxes, **estimate your total income for 2017** 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 or Student No. \_\_\_\_\_ Date \_\_\_\_\_

Signatures:

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



# Special Condition (Loss of Employment/Wages) Documentation Checklist

- \_\_\_\_\_ 2018-19 Special Condition Form
  
- \_\_\_\_\_ Letter from Student/Parent explaining the financial circumstances
  
- \_\_\_\_\_ 2018-19 Verification Worksheet
  
- \_\_\_\_\_ 2016 Federal Tax Return TRANSCRIPT\*
  -  Student (if the student filed a 2016 Federal tax return)
  -  Parent
- \_\_\_\_\_ 2017 Federal Tax Return TRANSCRIPT\* or estimated income if not available
  -  Student (if the student filed a 2017 Federal tax return)
  -  Parent

### ***Important Note***

The fastest way to confirm the income reported on the FAFSA is by using the IRS Data Retrieval Tool through the 2018-2019 FAFSA. If you have already submitted your FAFSA, you may log in and click “make a correction”. You will be asked a series of questions to determine if you are eligible to use the IRS Data Retrieval Tool. If you are unable to use the IRS Data Retrieval Process through the 2018-2019 FAFSA or if you change your retrieved tax data, then you must provide a **2016 Tax Return Transcript from the IRS** to complete your verification/special condition. You may print a free PDF version of your 2016 Federal Tax Return Transcript by logging on to [www.irs.gov](http://www.irs.gov). You may contact the IRS at (800)908-9946 with questions.

\* We can no longer accept copies of your Federal 1040/1040A/1040EZ form(s) as a way to confirm the income reported on the FAFSA. If we receive copies of your 2015 Federal 1040 form(s), they will be returned to you.

- \_\_\_\_\_ Letter from Employer confirming loss of employment/wages
  
- \_\_\_\_\_ Last Pay Stub (For everyone who filed a 2016 federal tax return)
  
- \_\_\_\_\_ Copy of all 2016 W2's to verify all household income
  
- \_\_\_\_\_ Unemployment Contract
  
- \_\_\_\_\_ Severance Pay Letter/Contract