



Scholarship and Financial Aid Office Special Condition Form 2023-2024

Students whose family experiences a change in financial circumstances that will lower family resources from 2021 to 2022 may be eligible for a recalculation of their aid eligibility based on estimated 2022 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 2023-2024 **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 2022.

(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.)

- 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 2023-2024 Verification Worksheet and provide a copy of the 2021 IRS Tax Return Transcript for parent(s) and student, if applicable.**
- 4) If you have completed your 2022 taxes, please provide a 2022 tax return transcript. If you have not filed your taxes, **estimate your total income for 2022** 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: _____

2023-2024 Special Condition Form (Loss of Employment/Wages) Documentation Checklist

_____ 2023-2024 Special Condition Form

_____ Letter from Student/Parent explaining the financial circumstances

_____ 2023-2024 Verification Worksheet

_____ 2021 Federal Tax Return TRANSCRIPT*

 Student (if the student filed a 2021 Federal tax return)

 Parent

_____ 2022 Federal Tax Return TRANSCRIPT* or estimated income if not available

 Student (if the student filed a 2022 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 2023-2024 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 2023-2024 FAFSA, or if you change your retrieved tax data, then you must provide a **2021 Tax Return Transcript from the IRS** to complete your verification/special condition. You may print a free PDF version of your 2021 Federal Tax Return Transcript by logging on to www.irs.gov. You may contact the IRS at (800)908-9946 with questions.

* In rare circumstances we can accept copies Federal 1040 form(s) as a way to confirm the income reported on the FAFSA assuming your tax preparer's PTIN is present and is signed and dated by you. Please make every effort to receive your official IRS Tax Return Transcript.

_____ Letter from Employer confirming loss of employment/wages

_____ Last Pay Stub (For everyone who filed a 2021 federal tax return)

_____ Copy of all 2021 W2's to verify all household income

_____ Unemployment Contract

_____ Severance Pay Letter/Contract