



2018-2019: SPECIAL CONDITIONS APPLICATION

STUDENT NAME:	STUDENT ID#:
ADDRESS:	CITY, STATE, ZIP:
PHONE NUMBER:	EMAIL:

You must file a 2018-2019 FAFSA before completing this form. Typically, the data provided on the Free Application for Federal Student Aid (FAFSA) is intended to determine the amount your family can reasonably be expected to pay toward your college costs. If your *actual* 2017 earnings or your *estimated* 2018 earnings is **at least 25% less** than the 2016 actual income, you may be eligible for consideration of special circumstances.

SECTION I: REASON FOR SPECIAL CONDITION REQUEST (Must Complete)

To determine if any adjustments can be made to your financial aid application, please check the box(es) to the left of the reason(s) that best meets your request for reduction of income and complete the appropriate section(s). You **MUST** also submit documentation items listed under the respective reason for your request.

Drastic change in earnings or loss of other income: Student/spouse/parent who received income in 2016 lost his/her job and had a major loss of employment income in 2017 or 2018. This could include a loss of earnings, reduction in earnings, loss of employment or social security benefits, child support, or other taxed or untaxed income.

Specify whom this circumstance pertains to: Student _____ Spouse _____ Father _____ Mother _____

Date reduction/loss occurred: _____ (DO NOT LEAVE BLANK)

The following items **MUST** be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Student /spouse or student/parent's final or last pay stub in 2018 from all employers. The pay stub(s) must document year-to-date earnings.
- For loss of employment: Initial letter from Texas Workforce that includes beginning and ending dates of benefits and the amount received.
- For proof of job loss: Letter from prior employer stating date of job loss.
- If presently working, a letter from that employer verifying hours per week and salary.
- For untaxed income loss (social security, child support, etc.): Submit verifying documentation.
- Copy of all W-2s from 2017, and a signed copy of student/spouse's or student/parent's completed 2017 federal income tax return if filed.
- After December 31, 2018, you may be required to submit a signed copy of student/spouse's or student/parent's completed 2018 federal income tax return, tax schedules and all W-2s.

Divorce or legal separation: Since applying for financial aid, you/your parents have become divorced or separated.

Date of divorce/separation: _____ (DO NOT LEAVE BLANK)

The following items **MUST** be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- You must attach a copy of the divorce decree or the divorce petition verifying separation.
- Copy of all W-2s from 2017, and signed copy of completed 2017 federal income tax return (both if filed separately), if filed.
- After December 31, 2018, you may be required to submit a signed copy of your completed 2018 federal income tax return (both if filed separately), tax schedules and all W-2s.

Death of spouse/parent: Since applying for financial aid, your spouse/parent has died.

The following items MUST be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Copy death certificate.
- Copy of all W-2s from 2017, and a signed copy of student/spouse's or student/parent's completed 2017 federal income tax return if filed.
- After December 31, 2018, you may be required to submit a signed copy of student/spouse's or student/parent's completed 2018 federal income tax return, tax schedules and all W-2s.

Disability of student/spouse/parent:

Date of Disability: _____ (DO NOT LEAVE BLANK)

The following items MUST be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Disability certification.
- Copy of all W-2s from 2017, and a signed copy of student/spouse's or student/parent's completed 2017 federal income tax return if filed.
- Evidence of loss of earnings (such as a signed letter from employer on company letterhead).
- After December 31, 2018, you may be required to submit a signed copy of student/spouse's or student/parent's completed 2018 federal income tax return, tax schedules and all W-2s.

Unusually high medical or dental expenses not covered by insurance: Since applying for financial aid, you or your parent(s) are experiencing unusually high medical or dental expenses not covered by insurance.

You MUST answer the following questions:

1. How much **did you pay** for medical/dental **insurance** in 2016? (Do not include employer's contribution) \$ _____
2. What were your total **2016** medical/dental **expenses not paid by insurance**? \$ _____
3. Please explain if your unreimbursed medical/dental expenses will be higher in 2017 or 2018, and why. _____

4. How much do you **estimate** that you will **pay out-of-pocket** for medical/dental expenses in 2017 or 2018? _____

The following items MUST be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Copy of receipts for medical payments NOT covered by insurance from January 2017 through December 2017 or January 2018 through December 2018. Statements must show name of patient(s), dates of charges and amount paid by patient.
- Copy of all W-2s from 2017, and a signed copy of student/spouse's or student/parent's completed 2017 federal income tax return if filed.
- After December 31, 2018, you may be required to submit a signed copy of student/spouse's or student/parent's completed 2018 federal income tax return, tax schedules and all W-2s.

The federal formula used to calculate an EFC allows for 11% of a family's adjusted gross income to be allocated to medical expenses. Only medical expenses in excess of the 11% may be considered. Medical expenses that were an itemized deduction on the federal income tax return CANNOT be considered for professional judgment purposes.

Elementary or Secondary School Tuition for the Student's Siblings or Dependents: You or your parent(s) paid private elementary or secondary school tuition for your siblings or dependents.

The following items MUST be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2015 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Proof of institutional tuition expenses paid out-of-pocket.

Student's Name (PRINT): _____ Student ID#: _____

2016 Tax Return included a one-time income amount: You or your parent(s) received an inheritance, lump sum Social Security payment, a retirement or IRA distribution, or some other nonrecurring payment that was **spent or invested**.

The following items **MUST** be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Official documentation that identifies 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.

Other: The student can specifically identify another reasonable circumstance, which would substantiate a reduction in income for 2017 or 2018.

The following items **MUST** be presented, but additional documentation may be required:

- Dependent (or Independent) Student Verification Worksheet for 2018/2019 along with a copy of student/spouse's or student/parent's 2016 IRS Tax Return Transcript (if IRS Data Retrieval Tool was not used).
- Sufficient documentation verifying your circumstance.

SECTION II: STUDENT / FAMILY INCOME (Must Complete)

Before an adjustment can be made to your status, you must provide complete information regarding the change in 2016 financial circumstances for you or your parents. Please provide the best possible estimates for the period of 01/01/2017 to 12/31/2017 OR 01/01/2018 to 12/31/2018 as applicable. The Financial Aid Office can help you determine which year will more accurately reflect your ability to pay for college in 2018-2019. *After receiving this form and the required documents, we may ask you for further documentation.*

The Amounts You Are Reporting on This Form are... (choose only one)

- 2017 Actual Earnings**
 2018 Estimated Earnings

Report the Yearly Amounts

2017 or 2018 Taxable Income:

	Student	Spouse	Parent(s)
How much will be earned from work?	\$ _____	\$ _____	\$ _____
How much will be received in severance compensation?	\$ _____	\$ _____	\$ _____
How much will be received in unemployment benefits?	\$ _____	\$ _____	\$ _____
Other type of taxable income: _____	\$ _____	\$ _____	\$ _____
Other type of taxable income: _____	\$ _____	\$ _____	\$ _____

2017 or 2018 Untaxed Income:

How much will be received in Social Security benefits?	\$ _____	\$ _____	\$ _____
How much will be received in Worker's Compensation?	\$ _____	\$ _____	\$ _____
How much will be received in child support for all children?	\$ _____	\$ _____	\$ _____
Other type of untaxed income: _____	\$ _____	\$ _____	\$ _____
Other type of untaxed income: _____	\$ _____	\$ _____	\$ _____

Student's Name (PRINT): _____ Student ID#: _____

SECTION III: CERTIFICATION & SIGNATURE REQUIREMENTS (Must Complete)

ADDITIONAL STUDENT COMMENTS: _____

CERTIFICATION: I certify that to the best of my knowledge all of the information provided on this form and all attached documents is true and complete. If asked by an authorized official I agree to give proof of the information that I have given on this form. I realize that if I do not give proof when asked this request may not be processed for financial aid.

Student's (handwritten) Signature: _____ Date: _____

Parent's (handwritten) Signature: _____ Date: _____

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined up to \$20,000, sent to prison, or both.

Please complete and return this form and the Verification Worksheet along **with ALL supporting documentation** to Temple College, Financial Aid Office, 2600 South First Street, Temple, TX 76504. **Incomplete applications will not be processed.**

FOR OFFICE USE ONLY

Is there a prior year Special Conditions processed? Yes ___ No ___ Pell LEU: ___% Pell % used CY: ___% SULA: ___

Special Conditions decision: Approved _____ Denied _____ Will not benefit _____

Reason for Approval / Denial: _____

Data elements reduced or changed on the FAFSA: _____

Old EFC: _____ New EFC: _____

Financial Aid Administrator's signature/Title: _____ Date: _____