



Financial Aid Office  
 Aber Hall, 5<sup>th</sup> floor  
 Missoula, MT 59812-2232  
 Phone: (406) 243-5373  
[finaid@umontana.edu](mailto:finaid@umontana.edu)

## SPECIAL CIRCUMSTANCE REQUEST

**Student Name** \_\_\_\_\_ **UM ID #:** \_\_\_\_\_

This form is intended for students and parents whose financial situations differ from the tax year utilized for the FAFSA. The 2024-2025 FAFSA relies on 2022 tax year information, if you or your family's financial status has changed since filing your 2022 tax returns, kindly complete this form. Examples of common circumstances and the suggested supporting documentation are provided in the table below. NOTE: The Department of Education provides a few examples of what is *not* considered a special circumstance, which include: vacation expenses, tithing expenses, and standard living expenses such as utilities, credit card expenses, children’s allowances, etc.

**Submission Process:**

1. **Signed Form:** Please fill out and sign this form. If requesting a review for updated parent (contributor), then at least one parent (contributor) must also sign this form.
2. **Supporting documentation:** Check the table provided below to see what additional documentation may be requested regarding your specific circumstance. Note: UM cannot review a special circumstance request without corresponding supporting document(s).
3. **Written Statement:** Please provide a written statement that fully explains the changes that impacted your or your FAFSA contributor’s ability to pay for college. Include details such as names, employer names, income sources, amount of income change, dates, expected future income, etc.

By signing below, I/we certify that the information provided on this form, in the written statement & supporting documentation, are true and correct. I/we understand that this request may require further documentation and is subject to the professional judgment of the UM Financial Aid Office. Decisions are considered on a case-by-case basis. If I/we am found to have purposely given false or misleading information, I/we can be fined \$20,000, sent to prison, or both.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature (if dependent): \_\_\_\_\_ Date: \_\_\_\_\_

Parent Printed Name: \_\_\_\_\_ Parent Phone #: (\_\_\_\_) \_\_\_\_\_

Parent Email: \_\_\_\_\_

**Important Notes:**

1. **Communication:** All communication regarding your request will be sent to the student’s UM email address.
2. **Tax Data Conversations:** Detailed conversations about tax data will be initiated from our office with the tax filer. We are only allowed to discuss tax data with the tax filer.
3. **Verification:** If the student’s file was selected for verification, verification must be completed before submitting the Special Circumstance request. If selected, visit the **UMontana Verification Gateway** to complete verification.
4. **Timeline:** We will make every effort to complete the review of your request promptly. Due to the volume of requests, please allow **4-6 weeks** for processing.
5. **Eligibility:** Students must be in **good academic standing**, eligible for **Title IV aid**, and currently enrolled to have funds disbursed based on professional judgment. Therefore, allow enough time before the end of the enrollment term for processing. While there is no set submission deadline, a good rule of thumb is to submit by the **first day of the final month** of the term of enrollment.
6. **Keep Your Information Secure:** All documents with **Personally Identifiable Information (PII)**, such as tax returns, must be submitted using secure, encrypted means. We cannot accept documents from unencrypted emails (such as Yahoo or Gmail). Additionally, we cannot open documents from non-encrypted emails; this measure is in place for the security of your information. Unfortunately, fax submissions are not acceptable. The student’s UM email provides proper security for submitting documents to our email address. US Mail submissions are also acceptable.



**SPECIAL CIRCUMSTANCES DOCUMENTATION TABLE**

**All Special Circumstance Requests require:**

- **Signed Special Circumstance request form (page 1)**
- **A statement explaining your or your contributor(s) Special Circumstance (page 2 or attached)**
- **Supporting Documentation – This table provides examples of documentation that can be provided.**

CIRCUMSTANCE	REQUIRED DOCUMENTATION
Change in employment status and/or income*	<ol style="list-style-type: none"> <li>1) Documentation such as a termination letter from your former employer, unemployment benefits statement, or last pay stub that states 'last pay stub'. (These documents should be dated within 90 days of submission)</li> <li>2) A signed copy of the 2022 federal tax return including all applicable schedules <u>or</u> request a tax transcript at <a href="http://www.irs.gov/transcript">www.irs.gov/transcript</a>.</li> <li>3) Submit copies of W2's or Wage and Income Transcripts to identify the income earning(s).</li> <li>4) Alternative documentation: If 2023 or 2024 income is being requested to be used instead of 2022, please provide a signed copy of the 2023 federal tax return and all applicable schedules (or if appealing after January 1, 2025, then submit the 2024 federal tax return and all applicable schedules) or the corresponding year's IRS Tax Return Transcript. Go to <a href="http://www.irs.gov/transcript">www.irs.gov/transcript</a> to request transcript.</li> </ol>
Change in assets	Detailed documentation regarding which asset, what it was used for and current value of asset.
Change in marital status*	<ol style="list-style-type: none"> <li>1) Documentation to verify change in status such as court documents, signed letter from attorney, counselor, pastor, etc.</li> <li>2) A signed copy of the 2022 federal tax return including all applicable schedules <u>or</u> request a tax transcript at <a href="http://www.irs.gov/transcript">www.irs.gov/transcript</a> for the contributor(s) who will remain on the FAFSA.</li> <li>3) Copies of 2022 W2's or 2022 Wage and Income Transcripts to identify the income earning(s) for each source of income listed on the 2022 for those impacted by marital status.</li> <li>4) If a student is changing marital status, we may request the Spousal Worksheet.</li> </ol>
Contributor passed away after taxes were filed*	<ol style="list-style-type: none"> <li>1) Copy of death certificate.</li> <li>2) A signed copy of the 2022 federal tax return including all applicable schedules <u>or</u> request a tax transcript at <a href="http://www.irs.gov/transcript">www.irs.gov/transcript</a>.</li> <li>3) Submit copies of 2022 W2's or 2022 Wage and Income Transcripts to identify the income earning(s) for the income listed on the 2022 tax returns for the contributor who will remain on the FAFSA.</li> </ol>

Change in housing status (e.g. homelessness)	<p>Documentation from authority regarding housing situation such as from:</p> <p>A local educational agency homeless liaison (or designee), as designated by the <i>McKinney-Vento Homeless Assistance Act</i> (42 U.S.C. 11432(g)(1)(J)(ii)).</p> <p>The director (or designee) of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving individuals who are experiencing homelessness.</p> <p>The director (or designee) of a Federal TRIO program or a Gaining Early Awareness and Readiness for Undergraduate program (GEAR UP) grant.</p> <p>A financial aid administrator at another institution documented the student’s circumstance in the same or a prior award year. Contact our office to request an appointment to review status, if needed.</p>
Tuition expenses at an elementary or secondary school	Submit bill and receipts from any payment for school tuition for elementary and /or secondary school, for younger members in the household. Please provide these documents for the full year of 2024.
Additional family members enrolled in college - student must be enrolled half-time or more in a degree-program eligible for federal student aid	<ol style="list-style-type: none"> <li>1) Provide full name and birthdate of family member and full name of the college/university currently attending.</li> <li>2) Explain and provide documentation to verify how the additional family member in college creates financial hardship. Documents may include financial aid offer letter(s), bank statements, signed tax returns, etc.</li> </ol>
Removal of one-time payment or distribution	Provide documentation that will show that the disbursement, support, income or assets is no longer a viable resource. Ex: 1099 forms, court documents, one time sale of a property etc.
Rollover of IRA or pension included on 2022 tax return	Submit a copy of the 1099 form that indicates that the IRA or pension distribution was a rollover. If you do not have a copy of the 1099 form, we can take the 2022 Wage and Income Transcript or a signed copy of the 2022 tax return that listed the ROLLOVER.
Medical, dental, or nursing home expenses not covered by insurance	Submit documentation to verify the amount that insurance did not cover (out-of-pocket amount). If you are submitting multiple bills/documents, please also itemize and number your documents so we can keep track of the amounts being requested. We can also accept Schedule A if the expenses were listed on the tax return. Keep bills to the same tax year.
Child or dependent care expenses	See Budget Increase Request Form.
Severe disability of the student or other members of the student’s household	Submit documentation of expenses paid for the full year of 2023 and the partial year of 2024.
Other changes or adjustments that impact the students’ costs or ability to afford college.	Documentation to support assertion.