

Special Circumstance Request  
2020-2021 Year (Autumn 2020, Spring/Summer 2021)

Student Name: \_\_\_\_\_ UM ID#: 790-\_\_\_\_\_

UM E-Mail: \_\_\_\_\_ Phone#: \_\_\_\_\_

Eligibility for financial aid is based on the 2018 tax year which may not be indicative of a family's continuing ability to pay for a student's educational expenses. To remedy this, Congress has authorized the school's financial aid administrator to evaluate special circumstances on a case-by-case basis with adequate documentation. To begin an appeal, return this completed form (front and back), a personal statement, additional forms (see section 1 below) and any supporting documentation to the Financial Aid Office.

1. **Check the box** that best describes your situation and submit additional special circumstance forms listed below along with supporting documentation:
- Unusually high medical expenses paid during 2018 → complete **Medical Expenses for Special Circumstance form**
  - Parent in college during 2020-2021 academic year → submit documentation of parent's enrollment at other school
  - Student and/or spouse 2019 or 2020 annual income is lower than 2018 annual income
    - **2019 Income Request:** Please submit signed copy of your (and your spouse's, if married) 2019 federal tax return and also complete sections B & C of **Student Income Information for Special Circumstance form**
    - **2020 Income Request:** Please complete all sections of **Student Income Information for Special Circumstance form**
  - Parent 2019 or 2020 annual income is lower than 2018 annual income
    - **2019 Income Request:** Please submit signed copy of your parent's (and spouse's, if married) 2019 federal tax return and also complete sections B & C of **Parent Income Information for Special Circumstance form**
    - **2020 Income Request:** Please complete all sections of **Parent Income Information for Special Circumstance form**
  - Unusually high medical expenses paid during 2019 or 2020
    - Complete **Medical Expenses for Special Circumstance form**
    - For the tax year in which the medical expenses were paid, please also provide the income information:
      - **2019 Adjustment Requested:**
        - Student (and/or spouse) paid medical expenses, submit signed copy of your (and your spouse's, if married) 2019 federal tax return and also complete sections B & C of **Student Income Information for Special Circumstance form**
        - Parent: Please submit signed copy of your parent's (and spouse's, if married) 2019 federal tax return and also complete sections B & C of **Parent Income Information for Special Circumstance form**
      - **2020 Adjustment Requested:** Please complete all sections of **Student Income Information for Special Circumstance form** or the **Parent Income Information for Special Circumstance form**.

2. **Write a detailed personal statement** of your special circumstance(s) on a separate page and submit with this form.
3. **Notifications:** For all dependent students, notification of requests for additional information and documentation and, of the completion of review, will be sent only to your UM student email account. If you would like for the information to be shared with your parent, you will need to forward requests to them.
4. **Timeline:** Our first priority is to ensure that all UM students have received their original financial aid offer prior to reviewing any special circumstance requests. In order to allow for sufficient time for the student and families to provide necessary documentation, the review of these requests will begin on May 1<sup>st</sup>, 2020 and will be reviewed in the order they are received. **Please note:** that if the student is selected for verification based on their FAFSA application (which utilizes 2018 income), that review must be completed *before* the special circumstance can be reviewed.

Due to the volume of these requests you may experience a notable delay from the date your request is submitted to the date it is reviewed. **As a result, it is recommended that the student proceed with the accepting of their Financial Aid Offer process in Cyberbear from their original aid offer and complete the process for accepting their term charges/"pay my bill" process and utilize that funding to assist with paying for their cost of attending.** Once the special circumstance is processed, if the student is eligible for increased aid, then those aid sources will be retroactively applied.

All requests and supporting documentation must be submitted by the 1<sup>st</sup> day of the final month of the semester for which the student is enrolled. For example: an autumn semester request must have all forms and documentation submitted by December 1<sup>st</sup>.

5. **Certification:** By signing below, I/We certify that all of the information provided on this form is true and complete to the best of my/our knowledge and that I/we understand this request may require further documentation and is subject to the professional judgment of the UM Financial Aid Office staff. Decisions are made annually and on a case-by-case basis. Any decision is final and applies **only** to UM. I/We also acknowledge that while a change in financial circumstances may lower a student's Expected Family Contribution (EFC), it may not result in a change to the student's financial aid offer. **Please note:** if you purposely give false or misleading information, you may be fined \$20,000, sent to prison, or both (FAFSA: pg. 8, Step Seven, U.S Department of Education).

\_\_\_\_\_  
Student signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent signature (*required only if student is dependent*)

\_\_\_\_\_  
Date