

SPECIAL CIRCUMSTANCE REQUEST

790#: _____ Last Name, First Name _____

The 2024-2025 FAFSA is based on 2022 tax year data. However, to allow students and their contributors to have the best possible financial aid package, Congress allows our office to use professional judgement on a case-by-case basis to adjust the components of a student's cost of attendance or the data used to calculate their Student Aid Index (SAI). The law gives some examples of special circumstances that **may** be considered (HEA Sec. 479A):

- Change in employment status, income, or assets;
- Change in marital status after the FAFSA was filed;
- Change in housing status (e.g., homelessness);
- Tuition expenses at an elementary or secondary school;
- Additional family members in household and/or enrolled in college;
- Medical, dental, or nursing home expenses not covered by insurance;
- Child or dependent care expenses;
- Severe disability of the student or other member of the student's household; and
- Other changes or adjustments that impact the student's costs or ability to pay for college.

This process is heavily reliant on documentation. We cannot consider a circumstance without a corresponding supporting document.

1. **VERIFICATION:** If your file was selected for verification, verification must be completed prior to the Special Circumstance request. If selected, go to UMontana.verificationgateway.org to complete verification.
2. Please provide a signed statement on the back of this form that fully explains the changes that impacted your or your contributor's ability to pay for college and/or the changes to the data elements on the FAFSA. Provide details: names, employer names, income source, amount of income change, dates, expected future income, etc. If needed, additional pages may be added.
3. Check the table provided or the website www.umt.edu/finaid/apply-for-aid/extenuating-circumstance to see what additional documentation may be requested regarding your specific circumstance.

Communication regarding your request will be sent to the student's UM email address. However, we are only allowed to discuss tax data with the tax filer. Therefore, any detailed conversations about tax data will be initiated from our office with the tax filer.

Timeline: We will make every effort to complete the review of your special circumstance in a timely manner. ***Due to the volume of requests, please allow 4-6 weeks for processing.*** Eligibility: Students must be in good academic standing, eligible for Title IV aid, and currently enrolled to have funds disbursed based on professional judgement; therefore, please allow adequate time prior to the end of the term of enrollment for processing. There is no set submission deadline but a good rule of thumb is the first day of the final month of the term of enrollment.

The Department of Education provides a few examples of what is not considered a special circumstance. Unreasonable requests include vacation expenses, tithing expenses, and standard living expenses such as utilities, credit card expenses, children's allowances, etc.

SPECIAL CIRCUMSTANCES DOCUMENTATION TABLE

This is a listing of some of the documents that may be requested. Since the process is reliant on documentation, please take the time to gather the requested documents and submit documentation along with the Special Circumstance Request form. **Place your student's name and UM Identification # on all contributor (parent) documents so that the documents can be kept together. Also, double-check for signatures and schedules before submitting documents.**

CIRCUMSTANCE	DOCUMENTATION
Change in employment status and/or income*	<ol style="list-style-type: none"> 1) Submit documentation such as a termination letter from your former employer, unemployment benefits statement, or last pay stub that states 'last pay stub'. 2) Submit a signed copy of the 2022 federal tax return and all applicable schedules (MUST HAVE handwritten signature of tax filer or full name of tax preparer with ID #) or IRS Tax Return Transcript. Go to www.irs.gov/transcript to request transcript. 3) Submit copies of W2s or Wage and Income Transcripts to identify the income earner(s). 4) If unemployment documentation is submitted, the documentation must be recent: within 90 days. 5) 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 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 www.irs.gov/transcript to request transcript.
Change in assets	If change to assets, detailed documentation regarding which asset, what it was used for and current value of asset. (Assets are not usually changed but will be evaluated on a case-by-case basis.)
Change in marital status*	<ol style="list-style-type: none"> 1) Submit documentation to verify change in status such as court documents, signed letter from attorney, counselor, pastor, etc. 2) Submit a signed copy of the 2022 federal tax return (MUST HAVE handwritten signature of tax filer or full name of tax

	<p>preparer with ID #) and all applicable schedules or IRS Tax Return Transcript.</p> <p>3) Submit a copy of the 2022 Wage and Income Transcript or all W2s for each source of income listed on the 2022 jointly filed federal tax return and all applicable schedules of the contributor who will remain on the FAFSA. Go to www.irs.gov/transcript to request transcript.</p> <p>4) If a student is changing marital status, we may request the Spousal Worksheet.</p>
Contributor passed away after FAFSA was filed*	<p>1) Submit copy of death certificate.</p> <p>2) Submit a signed copy of the 2022 federal tax return and all application schedules (MUST HAVE signature of tax filer or full name of tax preparer with ID #) or IRS Tax Return Transcript.</p> <p>3) Submit a copy of the 2022 Wage and Income Transcript or all W2s for each source of income listed on the 2022 jointly filed federal tax return of the contributor who will remain on the FAFSA. Go to www.irs.gov/transcript to request transcript.</p>
Change in housing status (e.g. homelessness)	<p>Documentation from authority regarding housing situation such as from:</p> <ul style="list-style-type: none"> • 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)). • 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. • The director (or designee) of a Federal TRIO program or a Gaining Early Awareness and Readiness for Undergraduate program (GEAR UP) grant. • A financial aid administrator at another institution who 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.
Tuition expenses at an elementary or secondary school	Submit documentation of paid tuition. Keep bills to the same tax year.
Additional family members enrolled in college - student must be enrolled half-time or more in a degree-program eligible for federal student aid	<p>1) Provide full name and birthdate of family member, full name of college/university.</p> <p>2) Explain and provide documentation to verify how the additional family member in college creates a financial hardship. Documents may include financial aid offer letter(s), bank statements, signed tax returns, etc.</p>

Removal of one-time payment or distribution	Provide documentation that will show that the disbursement, support, income or asset is no longer a viable resource. Ex: 1099 forms, court documents, 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 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. Amount must exceed 11% of the Income Protection Amount from the FAFSA calculations since a portion of the income.
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. Keep bills to same tax year.
Other changes or adjustments that impact the students' costs or ability to afford college	Documentation to support assertion.

TIPS:

Please contact the office if you have any difficulty gathering required documents, have questions or need another option for document submission. Call (406) 246-5373 or visit Aber Hall, 5th floor.

***If submitting copy of 1040 tax form, double-check that the tax filer has signed the second page where it states SIGN HERE using a handwritten signature using a 'wet ink' pen or finger/stylus.**

***All schedules must be submitted along with the signed 1040 tax form. In lieu of the 1040, we can accept the IRS Tax Return Transcript with in often more helpful as all the information required in on one document and the tax filer isn't needing to search for the schedules. Signed foreign tax returns are also acceptable.**

We often have to pause processing due to complete documentation not being submitted so please take the time to double-check. Students may check the status of the Special Circumstances request on CyberBear and also via their UM email account.

Also, don't forget to write the student's name and ID # that starts with 790 on all documents.