

# 2020-2021 Special Circumstance Form

Federal Student Aid regulations provide for re-evaluation if your financial circumstances change. The 2018 income information that you reported on your financial aid application may not be an accurate indicator of your family's ability to pay educational costs.

**Please Read Carefully Before Continuing:**

A special circumstance can be considered if you/your spouse or your parent (if dependent) anticipates that their future income will be substantially less than what was earned and reported in 2018 on the Free Application for Federal Student Aid (FAFSA). This can occur when the student or a family member loses employment or other benefits such as child support, when a spouse or parent dies, or when the student or student's parents divorce. Additional expenses such as private tuition or medical expenses may also be considered if it substantially reduces the yearly income. If you believe a special circumstance exists, please complete the rest of this form.

**Step 1: Student Information-----**

Name: \_\_\_\_\_ CUC I.D. # H00  
Last First Middle

Permanent Address: \_\_\_\_\_  
Number and street City IL Zip Code

Telephone: Home: ( ) \_\_\_\_\_ Work: ( ) \_\_\_\_\_

**Step 2: Reason for Filing a Special Circumstance Form-----**

Type of income / benefit lost:  Employment  Child Support  Death  Divorce  
 Other (please explain) \_\_\_\_\_

Income reduction due to:  Private tuition  Medical expenses

Relationship to the student:  Self  Spouse  Father / Step-Father  Mother / Step-Mother  Other

Name of Person for whom financial benefits were lost/expenses paid: \_\_\_\_\_

Date person became unemployed or lost benefits: \_\_\_\_\_

Total amount of earnings / benefits in 2018: \$ \_\_\_\_\_

Total earnings / benefits anticipated for impacted calendar year 2019 or 2020: \$ \_\_\_\_\_

If unemployed, are unemployment benefits being utilized?  Yes  No

Weekly amount of unemployment benefits: \$ \_\_\_\_\_ Date benefits began: \_\_\_\_\_

**Please turn over and continue:**

### Step 3: Required Documentation-----

**You must attach a signed statement explaining the circumstances, in addition to the following supporting documentation or it will not be processed:**

- If unemployed:
  1. A copy of the unemployed person's 2018 W-2 form(s) (and a federal tax return transcript will be required, if filed). If after 1/1/20, also provide copies of 2019 W-2's.
  2. A letter from the former employer stating last date of employment and the total that was earned for the current calendar year (you may also provide a last pay stub as long as the dates match)
  3. A copy of the letter from the unemployment office showing eligible benefits.
  4. A copy of the unemployed person's 2019 federal tax return transcript may be required or W-2 forms, if you are applying for a special circumstance for changes based on calendar years, 2019 or 2020.
- If divorce or death occurred:
  1. A copy of the divorced or deceased person's 2018 W-2 form(s) (and a federal tax return transcript may be required)
  2. A copy of the divorce decree or death certificate
- If benefits such as child support has been lost:
  1. A copy of the 2018 W-2 form(s) (and a federal tax return transcript may be required), of the person who lost the benefits
  2. A statement from the agency that provided the benefit, stating the date the benefit expired and total received in 2019 and/or 2020
- If you paid for private child care and/or private elementary or secondary tuition **in excess of 3%** of your or your parent's (if dependent) gross in 2018 or 2019 income:
  1. Copies of tuition statements for the corresponding 2018 or 2019 calendar year
  2. A copy of the 2018 or 2019 federal tax return transcript may be required
- If you paid medical expenses that will not be covered by insurance or itemized on your tax return, **in excess of 11%** of your or your parent's (if dependent) gross 2018 or 2019 income:
  1. Copies of medical statements, showing payments made in 2018 or 2019, or copies of canceled checks used for payment.
  2. A copy of the person's 2018 or 2019 federal tax return transcript may be required
- If your situation has not been identified, please submit the following:
  1. All applicable documentation regarding the situation
  2. 2018 or 2019 W-2 form(s) for the year benefits were lost (a federal tax return transcript may be required)

### Step 4: Read, Sign and Return to the Office of Financial Aid -----

**Certification:** All of the information on this form and attached documentation is true and complete to the best of my knowledge. If asked by an authorized official, I agree to give additional proof of the information that I have given on this form.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent/Spouse Signature

\_\_\_\_\_  
Date

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#### FOR OFFICE USE ONLY

- Based on my professional judgment, after a review of the exceptional circumstances and documentation provided, this Special Circumstance has been approved.
- Denied

\_\_\_\_\_  
Financial Aid Official

**Return To: Concordia University Chicago, Office of Financial Aid, 7400 Augusta St., River Forest, IL 60305  
Office: (708) 209-3113 | Fax: (708) 488-4102 | Email: Financial.Aid@CUChicago.edu**