



**2018-2019 INDEPENDENT CONSIDERATION OF SPECIAL CIRCUMSTANCES**

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

Complete this form only if you have already completed the 2018-2019 FAFSA (Free Application for Federal Student Aid). Please submit photocopies, as these documents will not be returned to you.

**All types of special circumstances must complete steps 1-3 and supply acceptable documentation.**

1. Please attach a detailed letter explaining your special circumstance.
2. Provide your and your spouse's (if applicable) 2016 **IRS tax return transcript**. (See page 4 for instructions)
3. Complete Section A-E and the signature section at the end.

**PLEASE NOTE: Not all circumstances will result in an adjustment of aid. The Special Circumstance Committee ensures that federal, state, and institutional policies and regulations are upheld.**

**Types of Special Circumstances:**

Below are some of the types of special circumstances that we can review. Please attach all required documents and submit to the Office of Financial Aid at the above address.

<b>Circumstance</b>	<b>Acceptable Documentation</b>
Paid Medical/Dental expenses not covered by insurance	<ul style="list-style-type: none"> <li>• IRS Form 1040, Schedule A</li> <li>Or</li> <li>• Copies of cancelled checks or statements indicating amount <b>PAID</b>.</li> </ul>
Reduction in income due to involuntary unemployment	<ul style="list-style-type: none"> <li>• Complete the 2018 Student or Spouse Expected Income section of this document.</li> <li><b>And</b></li> <li>• Letter from employer indicating last date of employment</li> <li><b>And</b></li> <li>• Final pay stub</li> <li><b>And</b></li> <li>• Copy of Determination of Benefits Rights letter for unemployment</li> </ul>
Loss of non-taxable income, such as Child Support or Worker's Compensation	<ul style="list-style-type: none"> <li>• Official statement of benefits with termination date</li> </ul>
Divorce, separation, or death of spouse <b>Date of Divorce/Separation:</b> _____	<ul style="list-style-type: none"> <li>• Divorce or legal separation agreement</li> <li>• 2016 W2 forms</li> <li>• Death Certificate</li> </ul>
Private Elementary/Secondary Tuition Expenses	<ul style="list-style-type: none"> <li>• Copy of the tuition bill for the 2018-2019 academic year</li> </ul>
Unusual one time income change such as inheritance, capital gain, or catastrophic expense	<ul style="list-style-type: none"> <li>• Statement indicating the nature of this occurrence</li> </ul>
Spouse enrolled at least half time in college	<ul style="list-style-type: none"> <li>• Copy of registration statement for 2018-2019</li> </ul>

**A. Family Information- List the people in your household, please include:**

- Yourself
- Your spouse (if applicable)
- Your children, if you will provide more than half of their support from July 1, 2018 through June 30, 2019
- Any other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2018 through June 30, 2019

<b>Full Name</b>	<b>Age</b>	<b>Relationship</b>	<b>College Name</b> (for any household member attending at least half-time between 7/1/18 and 6/30/19, and will be enrolled in a degree, diploma, or certificate program)
Example: Mark Jones	30	Spouse	Edgewood College
		Self	

**B. STUDENT/SPOUSE (if applicable) Untaxed Income Information**

Untaxed Income	Student and Spouse (if applicable) Combined amount in 2016
Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. <b>Don't include</b> amounts reported in code DD (employer contributions toward employee health benefits).	
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.	
Child support received for any of your children. <b>Don't include</b> foster care or adoption payments.	
Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	
Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	
Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <b>Don't include</b> the value of on-base military housing or the value of a basic military allowance for housing.	
Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
Other untaxed income not reported in items 45a through 45h, such as workers' compensation, disability, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. <b>Don't include</b> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and that is not part of a legal child support agreement.	

**C. Student Tax and Income Information- Check one box**

- **Student 2016 IRS tax transcript (see IRS transcript retrieval instructions)**
    - I updated the FAFSA and used the IRS data retrieval option for the student financial information on (date)\_\_\_\_\_.
    - I have attached the student's 2016 IRS tax return transcript.
    - I will not file, am not required to file a 2016 Federal Tax Return, and I DID NOT work in 2016. I submitted the 4506-T to the IRS on (date)\_\_\_\_\_.

(Confirmation of nonfiling status is required. Submit form 4506-T to the IRS to obtain the acceptable nonfiling status confirmation. Complete lines 1-4 and the signature section of the attached 4506-T form.)

  - I will not file, am not required to file a 2016 Federal Tax Return and I DID work in 2016. I submitted the attached 4506-T to the IRS on (date)\_\_\_\_\_ and completed the chart below.
- (Confirmation of nonfiling status is required. Submit form 4506-T to the IRS to obtain the acceptable nonfiling status confirmation. Complete lines 1-4 and the signature section of the attached 4506-T form.)

Employers / Source of Income	Amount in 2016	W2 was received for this
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2

**D. Spouse Tax Forms and Income Information- Check one box**

- **Spouse 2016 IRS transcript (see IRS transcript retrieval instructions)**
  - Student and spouse filed 2016 taxes jointly.
  - Student and spouse filed 2016 taxes separately. I have attached my spouse's 2016 federal tax return transcript.
  - My spouse did not file taxes – complete the chart below.

Employers / Source of Income	Amount in 2016	W2 was received for this
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2
		<input type="checkbox"/> No <input type="checkbox"/> Yes, please attach W2

**E. EXPECTED 2018 INCOME (January 1, 2018 – December 31, 2018)-** Complete ONLY if you are appealing due to loss of income and ONLY for the individual affected.

**Affected person(s):**

Name of individual(s) whose income has significantly changed \_\_\_\_\_

1. In the spaces below, the affected person will need to itemize their actual and/or estimated total monthly gross income (before deductions) from work. If they will not have any income from work please fill in blank(s) with a zero (0).
2. If the affected person will be receiving any of these benefits below, please indicate the amounts per month and total all columns that have monthly amounts reported.

**Monthly gross income from work (before deductions)**

Please Check:

- Student
- Spouse

Jan 2018	\$	
Feb 2018	\$	
Mar 2018	\$	
Apr 2018	\$	
May 2018	\$	
June 2018	\$	
July 2018	\$	
Aug 2018	\$	
Sept 2018	\$	
Oct 2018	\$	
Nov 2018	\$	
Dec 2018	\$	
Total		

**Monthly income from benefits**

Please Check:

- Unemployment benefit
- Worker's compensation
- Child support received (for all family members)

Jan 2018	\$	
Feb 2018	\$	
Mar 2018	\$	
Apr 2018	\$	
May 2018	\$	
June 2018	\$	
July 2018	\$	
Aug 2018	\$	
Sept 2018	\$	
Oct 2018	\$	
Nov 2018	\$	
Dec 2018	\$	
Total		

**All of the following are required:**

- A detailed letter explaining your special circumstances
- Your and your spouse's (if applicable) 2016 **IRS tax return transcript**- copies of the federal tax forms are not acceptable
- Acceptable documentation to support your special circumstance
- A completed and signed copy of this form

**My signature below certifies that all information on this request and attachments is true, accurate and complete to the best of my knowledge. I understand that approval of this request is contingent upon the accuracy of the information submitted on the FAFSA.**

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

After all required documents have been received, the student will be notified of the outcome via Edgewood email within 2 weeks. If you would like the results copied to an additional email address, please provide the address below.

Additional email: \_\_\_\_\_

Submit Materials to:  
 Financial Aid/Edgewood Central  
 1000 Edgewood College Dr.  
 Madison, WI 53711

Fax: 608-663-3495  
 Scan & Email: [ecentral@edgewood.edu](mailto:ecentral@edgewood.edu)

## IRS Transcript Retrieval Instructions for 2016 Taxes

Determine if **Parent 2016 IRS transcript**, **Student 2016 IRS transcript**, or **both** are needed and then complete Option A or B below.

**Option A (preferred method)** Use the FAFSA-IRS Data Retrieval Tool (DRT).

- Log in at [www.fafsa.gov](http://www.fafsa.gov) and click “make FAFSA corrections”. Enter your FSA ID and password.
- Go to the “Financial Information” section under parent and/or student and indicate the 2016 taxes are “already completed”
- Answer the questions to determine if you can use the Data Retrieval Tool. (If it is unavailable, proceed to option B)
- Enter the appropriate FSA ID and click “Link to the IRS”. Enter the requested info and click “Submit”.
- A new screen will appear with some information already populated from the IRS. **Transferring data from the IRS requires the remaining information to be entered as it appears on the tax form.** (ie. If the address on the taxes is “RD”, do not enter “Road”, please enter “RD”)
- Check “Transfer My Tax Info into the FAFSA”. Click “Transfer Now”.

The screenshot shows the IRS.gov website interface for the 2016 Federal Income Tax Information. At the top, there are links for 'Return to FAFSA', 'Log Out', and 'Help', along with a 'Español' link. The main heading is '2016 Federal Income Tax Information'. Below this, there is a section for 'Edit Data' with a warning that the IRS will securely transfer tax information to the Department of Education (ED) to populate FAFSA questions. A table lists various tax items: Tax Year, Name(s), Social Security Number, Filing Status, IRS Exemptions, Type of Return Filed, Adjusted Gross Income, Income Earned from Work, Income Tax, Education Credits, Untaxed Pensions, Untaxed IRA Distributions, Tax exempt Interest Income, IRA Deductions and Payments, and Status of Amended Returns Received. Below the table, there are two main options: 'Transfer My Tax Information into the FAFSA' (with a red circle around the radio button) and 'Do Not Transfer My Tax Information and Return to the FAFSA'. The 'Transfer Now' button is also circled in red. At the bottom, there is a link for 'IRS Privacy Policy'.

**Option B:** Request 2016 tax RETURN transcript(s) from the IRS for parent and/or student.

\*Once you have the Tax Return Transcripts, please submit them to Edgewood College; include the student's name and Edgewood ID.

Email to [ecentral@edgewood.edu](mailto:ecentral@edgewood.edu), fax to 608-663-3495 or mail to 1000 Edgewood College Drive, Madison, WI 53711

Go to: [www.irs.gov](http://www.irs.gov)

**Get Transcript Online**

- Click "Get My Tax Record"
- Click "Get Transcript Online" (If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by Mail, see below)
- Follow instructions for creating an account or log in.
- Select "Tax Return Transcript" (not "Tax Account Transcript") and in the Tax Year field, select "2016".

**Get Transcript by Mail**

- Click "Get My Tax Record"
- Click "Get Transcript by Mail"
- Follow instructions.
- Select "Tax Return Transcript" (not "Account Transcript") and in the Tax Year field, select "2016".
- Tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request within 5 to 10 days.

### Get Transcript Online

#### What you Need

To register and use this service, you need your:

- SSN
- Date of birth
- Filing status and mailing address from latest tax return
- Access to your email account
- Your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan
- A mobile phone with your name on the account

### Get Transcript by Mail

#### What you Need

To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN)
- Date of birth
- Mailing address from your latest tax return

**Tips for Resolving Address Issues:**

- The address entered must match the one on your most recent tax return (if possible, have your taxes in front of you).
- Spelling out the word “street” rather than using the abbreviation “st.” can be enough to cause an error.
- Addresses on the IRS system are auto-corrected through a post office program and may not match what you put on your tax return.
- If you entered your address as it appears on your return and it doesn't work, try using the standardized version of your address:  
1) Go to [www.usps.com](http://www.usps.com) 2) Click Look Up a Zip Code 3) Enter Street Address, City, State 4) Click Find