



2017-2018 INDEPENDENT CONSIDERATION OF SPECIAL CIRCUMSTANCES

Student Name: _____ **Student ID#** _____

Complete this form only if you have already completed the 2017-2018 FAFSA (Free Application for Federal Student Aid). If this form is incomplete or lacks the required documentation, no action will be taken. 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) 2015 **IRS tax return transcript**. (See page 4 for instructions)
3. Complete Section A-G 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.

Circumstance	Acceptable Documentation
Paid Medical/Dental expenses not covered by insurance	<ul style="list-style-type: none"> • IRS Form 1040, Schedule A Or • Copies of cancelled checks or statements indicating amount PAID.
Reduction in income due to involuntary unemployment	<ul style="list-style-type: none"> • Complete the 2017 Student or Spouse Expected Income section of this document. And • Letter from employer indicating last date of employment And • Final pay stub And • Copy of Determination of Benefits Rights letter for unemployment
Loss of non-taxable income, such as Child Support or Worker's Compensation	<ul style="list-style-type: none"> • Official statement of benefits with termination date
Divorce, separation, or death of spouse Date of Divorce/Separation: _____	<ul style="list-style-type: none"> • Divorce or legal separation agreement • 2015 W2 forms • Death Certificate
Private Elementary/Secondary Tuition Expenses	<ul style="list-style-type: none"> • Copy of the tuition bill for the 2017-2018 academic year
Unusual one time income change such as inheritance, capital gain, or catastrophic expense	<ul style="list-style-type: none"> • Statement indicating the nature of this occurrence
Spouse enrolled at least half time in college	<ul style="list-style-type: none"> • Copy of registration statement for 2017-2018

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, 2017 through June 30, 2018.
- 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, 2018

Full Name	Age	Relationship	College Name (for any household member attending at least half-time between 7/1/17 and 6/30/18, and will be enrolled in a degree, diploma, or certificate program)
Example: Mark Jones	30	husband	Edgewood College
		Self	

Untaxed Income	Student and Spouse (if applicable) Combined amount in 2015
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. Don't include 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. Don't include 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). Don't include 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. Don't include 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. Supplemental Nutrition Assistance Program Verification

- No one listed in Section A received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) during the 2015 or 2016 calendar years.
- One of the persons listed in Section A received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) during the 2015 or 2016 calendar years. If asked by the school, I will provide documentation of the receipt of SNAP benefits during 2015 and/or 2016.

D. Child Support Verification

- Neither I, nor my spouse (if applicable) who is listed in section A, **paid** child support in 2015.
- Either I, or my spouse (if applicable) who is listed in Section A, **paid** child support in 2015. If asked by the school, I will provide documentation of the payment of child support.

Complete the information below

If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2015
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

E. Student Tax and Income Information- Check one box

- I have attached my 2015 federal tax return transcript- Do not complete table below. See Page 4 for instructions.
- I will not file and am not required to file a 2015 Federal Tax Return. Please complete Page 5.

F. Spouse (if applicable) Tax Forms and Income Information- Check one box

- Student and spouse filed 2015 taxes jointly.
- Student and spouse filed 2015 taxes separately. I have attached my spouse's 2015 federal tax return transcript.
- Spouse will not file and is not required to file a 2015 Federal Tax Return. Please complete Page 5.

G. EXPECTED 2017 INCOME (January 1, 2017 – December 31, 2017)- 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 2017	\$	
Feb 2017	\$	
Mar2017	\$	
Apr 2017	\$	
May 2017	\$	
June 2017	\$	
July 2017	\$	
Aug 2017	\$	
Sept 2017	\$	
Oct 2017	\$	
Nov 2017	\$	
Dec 2017	\$	
Total		

Monthly income from benefits

Please Check:

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

Jan 2017	\$	
Feb 2017	\$	
Mar2017	\$	
Apr 2017	\$	
May 2017	\$	
June 2017	\$	
July 2017	\$	
Aug 2017	\$	
Sept 2017	\$	
Oct 2017	\$	
Nov 2017	\$	
Dec 2017	\$	
Total		

All of the following are required:

- A detailed letter explaining your special circumstances
- Your and your spouse's (if applicable) 2015 **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



IRS Transcript Retrieval Instructions

IRS Transcript Retrieval Instructions

Obtain your and your spouse's (if applicable) 2015 IRS tax **RETURN** transcript(s)

- On www.irs.gov > under "Tools" click "Get Transcript of Your Tax Records" > Choose either Get Online or Get by Mail
- Online option will provide the transcript immediately; Mail option will take 7-10 days to process
- Be sure to order an IRS **tax RETURN transcript**, NOT the IRS tax *account* transcript.
- Email, Fax, or mail the IRS tax return transcripts with this form to the contact information at the top of this form.

Welcome to Get Transcript



[Español](#) | [中文](#) | [한국어](#) | [TiếngViệt](#) | [Русский](#)

You can get various Form 1040-series [transcript types](#) online or by mail. If you need your prior year **Adjusted Gross Income (AGI)** to e-file, choose the **tax return transcript** type when making your request. If you only need to find out how much you owe or verify payments you made within the last 18 months, you can [view your tax account](#).

The method you used to file your tax return, e-file or paper, and whether you had a balance due, affects your [current year transcript availability](#). **Note:** If you need a photocopy of your return, you must use [Form 4506](#).

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, and
- a mobile phone with your name on the account.

What You Get

- All [transcript types](#) are available online
- View, print or download your transcript
- Username and password to return later

Get Transcript by
MAIL



What You Need

To use this service, you need your:

- [SSN](#) or [Individual Tax Identification Number \(ITIN\)](#),
- date of birth, and
- mailing address from your latest tax return

What You Get

- Return or Account [transcript types](#) delivered by mail
- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

Related Forms

- › Form 4506, Request for Copy of Tax Return
- › Form 4506-T, Request for Transcript of Tax Return
- › Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript
- › Formulario 4506T-EZ (SP), Formulario Abreviado para la Solicitud de un Trasunto de la Declaracion de Impuestos Personales

Related Websites

- › Social Security Administration (SSA) - My Account
- › Free Application for Federal Student Aid (FAFSA)

Visit our [Get Transcript frequently asked questions \(FAQs\)](#) for more information.

CAUTION: We never call or send email or text messages asking you to provide information or log in to obtain a transcript or update your profile. Visit [report phishing](#) for instructions if you are unsure about the authenticity of any "unsolicited" communication you receive, other than US mail, claiming to be from the IRS.



2017-2018 Statement of Non-Filing Status

Complete this form if you, your parent(s), and/or your spouse **did not and were not required to file** a 2015 federal income tax return (or foreign return) and provide documentation from the IRS confirming this status for each non-filer. You must also **attach copies of W-2 forms from all employers**. Replacement copies of W-2's may be obtained from your employer or by requesting a Wage and Income Transcript from the IRS (www.irs.gov).

Student Name _____ Student ID _____

Section A – Student and/or Student’s Spouse Statement of Non-Filing Status

Were you (the student) employed at any time during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Was your spouse employed at any time during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I am not married

If you, or your spouse, were employed in 2015 and did not file a tax return, list the income received from all employers (even if no W-2 was issued). Please attached copies of all W-2's.

Name of Non-Filer	Employer or Source of Income	2015 Income	W-2 Attached
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

I/we certify that I/we did not and were not required to file a 2015 Federal income tax return or foreign tax return and that all of the information reported is complete and accurate. (IRS confirmation is required)

Student’s Signature _____ Date _____ Spouse’s Signature _____ Date _____

Section B – Parent(s) Statement of Non-Filing Status

Were you (the parent(s)) employed at any time during 2015?	<input type="checkbox"/> Yes <input type="checkbox"/> No
------------------------------------------------------------	----------------------------------------------------------

If you (the parent(s)) were employed in 2015 and did not file a tax return, list the income received from all employers (even if no W-2 was issued). Please attach copies of all W-2's.

Name of Non-Filer	Employer or Source of Income	2015 Income	W-2 Attached
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

I/we certify that I/we did not and were not required to file a 2015 Federal income tax return or foreign tax return and that all of the information reported is complete and accurate. (IRS confirmation is required)

Parent Signature _____ Date _____ Parent or Spouse’s Signature _____ Date _____

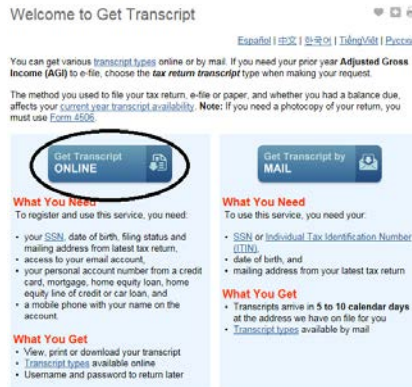
2015 FEDERAL INCOME TAX FILING REQUIREMENTS

Tax filing requirements may be found in the IRS Form 1040 instruction book. The amounts listed are for individuals under the age of 65. See www.irs.gov for additional information	For most people, a tax return must be filed with the IRS if their 2015 income was at least:			
	Single dependent student (someone else can claim you)	\$6,300 Earned Income	Married-filing separately	\$4,000 Gross Income
	Single, if claiming self	\$10,300 Gross Income	Head of household	\$13,250 Gross Income
	Married – filing joint return	\$20,600 Gross Income	Qualifying widow(er) w/ dependent	\$16,600 Gross Income
	*Self Employed Person	\$400 Net Earnings	*Fees received for babysitting, housecleaning and lawn cutting are all examples of taxable income for self-employment	

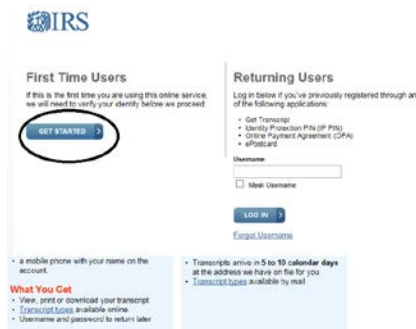
How to Order a Statement of Non-Filing Status Letter

1. Go to irs.gov/individuals/get-transcript

Click “Get Transcript Online”, read the message in the box and click OK to continue



2. Follow the instructions to create a login – once enrolled, enter the address exactly as it appears on your tax transcript.



3. If information matches, select the reason the transcript is needed (Higher Ed/Student Aid), and the tax year with the star listed under “Return Transcript”.

Get Transcript

Please select the reason you are requesting a transcript to help us determine the appropriate transcript for your needs.

Higher Education/Student Aid

Disaster-Related

FEMA/Disaster Related

State Licensing

State or Local Tax Issue

Income Verification

Federal Tax

Small Business Loan

Health Care

Immigration

Housing Assistance

Other

You selected: **Higher Education/Student Aid**
We suggest you download: **Return Transcript**

If you are unable to access the document online, please request the non-filing letter by mail or phone.

Phone Request for Verification of Non-Filing Letter: 1-800-829-1040

Postal Request for Verification of Non-Filing Letter: complete Form 4506T and mail or fax to the IRS. (The non-filing letter will be mailed to you within 10 business days)