



The University of Texas Permian Basin

**SPECIAL CIRCUMSTANCES APPLICATION  
(INDEPENDENT STUDENT)  
2019-2020**

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Office of Student Financial Aid  
University of Texas of the Permian Basin  
4901 E. University, Odessa, TX 79762-0001  
Phone: 432-552-2620  
Fax 432-552-2621

**Section A: Student Status**

Student Name: \_\_\_\_\_ Student Ph. #: \_\_\_\_\_  
UTPB ID#: \_\_\_\_\_ Student's Date of Birth: \_\_\_\_\_

**Section B: Instructions and General Information**

This application should be submitted to document an unusual circumstance that has caused a reduction of individual/family income from the 2017 income information submitted on the 2019-2020 FAFSA. It is the student's responsibility to provide all documentation required to support this request. In addition to the specific requested information, all applications must include a completed Independent Verification Worksheet and IRS Tax Transcript(s). After the application and all required documentation has been received, the committee will review your case, make a determination and advise you within 15-30 days of submission of this form.

**Your request will not be considered until all supporting documentation is received.** You will be notified of the decision. All decisions are final and are not subject to appeal with the U.S. Department of Education.

**Certification Statement:** I certify that the information I (we) provide on the following Special Circumstance Form and the documentation attached is true and correct to the best of my (our) knowledge. I understand that the Office of Financial Aid at UTPB may require additional verification. **I understand that an incomplete application will not be considered.** I also understand that if I (we) purposely give false or misleading information, I (we) may be subject to a fine, a prison sentence, or both.

\_\_\_\_\_  
Student Signature/Date

\_\_\_\_\_  
Spouse Signature (If applicable)/Date

**Section C: Special Circumstances to Be Considered**

- C-1. Loss of income from work.** (At least 12 consecutive weeks)  
Period of unemployment from \_\_\_\_\_ to \_\_\_\_\_.
  - \_\_\_ Layoff: Provide letter from employer or unemployment commission stating effective date.
  - \_\_\_ Plant closing: Provide letter from employer stating effective date.
  - \_\_\_ Termination: Provide letter from employer or unemployment commission stating effective date.
  - \_\_\_ Disability: Date of disability \_\_/\_\_/\_\_. Attach documentation of disability.
  - \_\_\_ Natural disaster: Date disaster occurred \_\_/\_\_/\_\_. Attach documentation.
  - \_\_\_ Change of Employment (At least a 25% reduction of income) Attach copies of your last two pay stubs from both employers showing year to date earnings.
  
- C-2. Loss of Benefits/untaxed income.** (i.e. social security, child support, etc.)
  - \_\_\_ Social Security: Provide Social Security Administration Notification of Termination of Benefits.
  - \_\_\_ Child Support: Provide court document stating termination of benefits.
  - \_\_\_ Worker's Compensation: Provide a letter from Bureau of Worker's Compensation stating termination date of benefits.
  - \_\_\_ Untaxed military benefits: Provide change of status documentation.
  
- C-3. Divorce.** (After applying for financial aid, your parents have divorced.)  
Date of divorce \_\_\_\_ Attach copy of divorce decree and you and your spouse's 2017 1040 tax return and W-2 form(s).
  
- C-4. Separation.** (After applying for financial aid, you and your spouse have separated.)  
Date of separation \_\_\_\_\_. Attach a copy of your and your spouse's 2017 Tax Return and W-2 form(s).
  
- C-5. Death.** (After applying for financial aid, a parent has died.)  
Date of death \_\_\_\_\_. Attach a copy of the death certificate.
  
- C-6. Unusually High Medical/Dental Expenses** (Paid out-of-pocket. Do not include amounts reimbursed by insurance).
  - \_\_\_ Attach a detailed explanation of the reported expenses and attach documentation (copies of bill and paid receipts, etc.) Also enter 2017 or 2018 1040 Schedule A Line 4 amount here \$\_\_\_\_\_ (Attach a copy of your 2017 or 2018, 1040 Schedule A)
  
- C-7. Private School Expenses and/or Adult Dependent Care Expenses**
  - \_\_\_ Private School: Attach a letter from the school outlining the total expense and documentation showing payment(s) you have made for calendar year 2018.
  - \_\_\_ Adult Dependent: Attach a letter from the provider outlining the total expense and documentation showing payment(s) you have made for calendar year 2018.
  
- C-8. One Time Income Exclusion.** (i.e. inheritance, moving expense, back years social security payments, lump sum retirement or IRS distribution, etc.)  
Attach a separate sheet identifying source of income and how the funds were spent or invested.
  
- C-9. Other.** (STOP...Contact Office of Student Financial Aid before completing this application)

**SECTION D: Income from 1/1/18 – 12/31/18 (Please Read Carefully)**

**Does tax year 2018 provide an appropriate representation of your current financial situation?  
If so, attach a copy of your 2018 Tax Return**

Please provide your **actual income** from January 1, 2018 to today. In addition, please provide your **projected income** from today through December 31, 2019.  
See the formula below:

**Current actual income + your projected income = Total projected 2019 income.**

<b>Actual Income Jan. 1, 2019 through today</b>	<b>Projected Income today through Dec. 31, 2019</b>	<b>Total</b>	
\$	\$		<b>Adjusted Gross Income (includes wages, salaries, severance pay, and disability payments.)</b>
\$			<b>Student's wages</b>
\$			<b>Spouse's wages</b>
\$			<b>Interest income and dividends</b>
\$			<b>Other taxable income (alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, Social Security, Railroad Retirement, and all other taxable income)</b>
\$			<b>Untaxed social security benefits</b>
\$			<b>TANF/Welfare</b>
\$			<b>Child support received</b>
\$			<b>Other untaxed income</b>

## Don't Forget to Include!!!

1. This document
2. A letter detailing why you are requesting consideration of your special circumstance
3. If student is divorced or separated, give income information of the student. If the student remarries, please submit income information for both student and spouse. The Department of Education does not recognize prenuptial agreements.
4. A copy of your (and your spouse's) 2017 and 2018 IRS Tax Return Transcript (see instructions below)
5. Other documentation as required from Section C.

### TO ORDER A FREE TAX RETURN TRANSCRIPT:

Online: Go to [www.irs.gov](http://www.irs.gov). Under the *Tools* section on the home page, select *Get A Transcript of Your Tax Records*. Select *Get Transcript ONLINE* and then *Create a Login*. Follow the prompts to create an account and select *Return Transcript* for tax year 2017 and 2018. NOTE: To receive an immediate electronic copy of your transcript, you must have filed at least two weeks prior to submitting this online request. Otherwise, you will need to request a paper copy and allow 5 to 10 days to receive the hard copy transcript.

By Phone: Call 1-800-908-9946. Use Option 2 to request an IRS Tax Return Transcript.

Once received, this may be Faxed to 432-552-2621 or mailed to Office of Financial Aid, 4901 E. University, Odessa, TX 79762-0001.

**SPECIAL NOTE: If this Special Circumstance Application is due to loss of employment and you currently remain unemployed, submit this application for consideration NO EARLIER THAN**