



2019-2020 Request for Income Override Due to Special Circumstances

Office of Financial Aid 3211 Providence Dr. UC 105 Anchorage, AK 99508

www.uaa.alaska.edu/financialaid (907) 786-1480 Fax: (907) 786-6122 financial.aid@uaa.alaska.edu

Financial aid eligibility for the 2019-2020 academic year is calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). The income and asset information that you submitted was evaluated by a formula called Federal Methodology as set by Congress. This formula assumes that 2017 income is a good predictor of the family's financial strength during the student's 2019-2020 enrollment. Based on this assumption, financial aid eligibility is determined using 2017 tax return information.

The Office of Financial Aid at the University of Alaska Anchorage recognizes that many families have changes in income or family situations that cannot be reflected in the 2017 tax return data. Therefore, it is possible for students to appeal their financial aid eligibility if they have unique financial circumstances.

An Income Override request may be filed if you have extenuating circumstances, which you believe warrant a reevaluation of your financial aid. Circumstances may include, but are not limited to:

- Loss or change of employment
- Loss or change in amount of child support, Social Security, or other benefits
- Divorce or separation of parents or spouse
- Death of parent(s) or spouse
- Unusual medical expenses (not covered by insurance) that make up more than 11 percent of your income
- Once-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments)
- Student's parent has retired

Circumstances that are **NOT** considered as extenuating include, but are not limited to:

- Standard Living expenses (e.g. utilities, credit card payments, children's allowances, etc.)
- Mortgage payments
- Car payments
- Credit card or other personal debts
- Vacation expenses
- All other discretionary expenses

All appeals require Tax Return Transcripts for student and parent (if student is dependent) along with W-2's and/or 1099's used to complete the tax return. You may obtain a tax return transcript by going online to www.irs.gov or you can call the IRS at 1-800-908-9946 and follow the prompts to request a Tax Transcript for 2018. We are unable to accept copies of 1040, 1040A, or 1040EZ forms.

Please allow 4 to 6 weeks processing time from the time all documentation has been submitted. Submitted documentation will not be returned. Please do not submit originals. Notification of the decision by the Office of Financial Aid will be sent to your preferred e-mail address. All decisions made by the Office of Financial Aid concerning special circumstances are final. If you have questions, please contact the One Stop at (907) 786-1480.

Check the box or boxes that apply to your situation and include ALL documentation listed next to each reason:

Reason	Documentation Required
<input type="checkbox"/> Loss or change of employment	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining your circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ Letter from former employer(s) stating last date of employment ○ Copy of unemployment compensation letter or signed statement that you did not or will not receive unemployment benefits ○ Copy of last paystub(s) from former employer(s) and current employer(s), if applicable. ○ If this form is submitted after 1/1/2020, 2019 Tax Return Transcripts and W-2's should be submitted for student (spouse) and parents (if dependent) ○ Copy of DD214 and LES if request is due to discharge from active military duty
<input type="checkbox"/> Loss or change in amount of child support, Social Security, or other benefits	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ If benefit is terminated, provide documentation of monthly benefit amount and date of benefit termination ○ If benefits are reduced, provide documentation of original amount, date of reduction and reduced amount
<input type="checkbox"/> Divorce or separation of parents or spouse	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ Copy of separation documentation, proof of separate households, or divorce decree
<input type="checkbox"/> Death of parent(s) or spouse	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ Copy of death certificate
<input type="checkbox"/> Unusual medical expenses (not covered by insurance) that make up more than 11 percent of your income	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ Proof of payment not covered by insurance
<input type="checkbox"/> One-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments)	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ Documentation to identify the source of income ○ Proof of payment and itemized statement showing how the funds were spent
<input type="checkbox"/> Student's parent has retired	<ul style="list-style-type: none"> ○ Income Override Request form ○ Detailed letter explaining circumstances ○ 2018 Tax Return Transcript for student and parents (if dependent) ○ 2018 W-2's for student and parents (if dependent) ○ Documentation of monthly income sources for all retirement income, including social security (if applicable)



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DO NOT LEAVE AN AREA BLANK

If you do not know what future earnings will be, use your best estimate and document your rationale.

Table with 3 columns: Source of Income, Student and Spouse (January - December 2019), Parent(s) of Dependent Student (January - December 2019). Rows include Income Earned from Work (Student, Spouse), Other Taxable Income (Interest, Dividends, Unemployment, Business, Pension, etc.), and Untaxed Income and Benefits (Child Support, Disability Payments, etc.).

I certify that the information on this form is true and correct to the best of my knowledge. I understand that I may be asked to submit additional documentation to verify the information I have provided. Failure to provide this information will result in this Recalculation request not being processed.

Student Signature: _____ Date: ____/____/____

Parent Signature: _____ Date: ____/____/____

(Parent Signature is required only if student provided parental data on the FAFSA)

Last Name First Name M.I.

UA Student ID#

UAA Email Address

Phone Number

Upon final review, an email will be sent to inform you on the outcome of this request. Check UAOnline for any and all updates

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