The Expected Family Contribution (EFC) is calculated to assess the financial strength of a federal student aid applicant or the applicant’s family. Readily verifiable information from the federal income tax return has proven the most reliable indicator of a family’s available income. For this reason, data from the 2018 tax year is used on the 2020-2021 application. However, if there have been changes to the family’s income or unusual expenses that may not be reflected on the FAFSA, the Financial Aid Office may decide on a case-by-case basis to modify data elements in the Expected Family Contribution (EFC) calculation.

IMPORTANT: Special Circumstance Requests will be reviewed in the order they are received. Any aid already awarded to you will be adjusted accordingly once your Special Circumstance Request review is completed and changes are accepted by the US Department of Education. INCOMPLETE FORMS WILL NOT BE PROCESSED AND WILL BE RETURNED TO THE STUDENT. All documents must be submitted together. You will be notified of the decision on your MyIvy account and/or Ivy Tech email account within 30 calendar days after submitting your complete appeal packet to the Financial Aid Office.

INSTRUCTIONS:

- **Step 1**: File the Free Application for Federal Student Aid (FAFSA) for 2020-2021.
- **Step 2**: Attach to this form a signed, dated statement explaining how your circumstances have changed since the 2018 tax year.
- **Step 3**: Complete this form in its entirety.

### SECTION 1: REASON FOR SPECIAL CIRCUMSTANCE REQUEST - attach appropriate documentation

- **Loss of Income**: if student/spouse/parent has been laid off/terminated, employer ceased business, had a reduction in work hours/pay, or resignation/retirement

  - Period of Unemployment: __________ to __________
    - [ ] Layoff
    - [ ] Disability – Begin Date: __________
    - [ ] Termination
    - [ ] Plant/Office Closing
    - [ ] Quit/reduced hours to return to school
    - [ ] Other – provide statement

  Submit documents listed below:

  - Most recent/final paystub for all places of employment for the 2019 calendar year or letter from employer showing earned wages to date in 2020.
  - Unemployment Maximum Benefit Statement - if applicable
  - Letter from previous employer on letterhead stating last date of employment (preferred document)
  - Letter from employer supporting your reduction of work hours, including how many hours you work per week, your pay rate, and effective date
  - IRS Tax Return Transcript for 2018 and W-2 forms (obtain at IRS.gov/individuals/get-transcript)
  - Household Size/Number in College form

- **Loss of Other Income** – Date of income loss: __________

  - [ ] Alimony – provide court documentation
  - [ ] Unemployment Compensation – provide letter from unemployment office
  - [ ] Other – provide appropriate documentation
  - [ ] One-Time Income - inheritance, moving expense allowance, lump sum retirement distribution, child support, etc.
  - [ ] IRS Tax Return Transcript for 2018 and W-2 forms (obtain at IRS.gov/individuals/get-transcript)
  - [ ] Household Size/Number in College form

- **Death of**
  - [ ] Parent of dependent student
  - [ ] Spouse of student

  - Death Certificate/Obituary
  - IRS Tax Return Transcript and W-2 forms for 2018 (obtain at IRS.gov/individuals/get-transcript)
  - Household Size/Number in College form
Separation or Divorce: Student and Spouse
Parents of dependent student

- Divorce Decree
- Child Support Statement/Receipts
- Separation Documentation (letters from parents or student with addresses documenting separate households)
- IRS Tax Return Transcript and W-2 forms for 2018 (obtain at IRS.gov/individuals/get-transcript)

Unusual Expenses Paid — unusual medical expenses, health care costs and other unusual expenses

- Attach documentation of the type and amount paid during 2018 and/or the amounts to be paid during the 2020-2021 school year.
- Doctor’s statement
- Medical bills/statements (reflecting payment) for medical/dental expenses; include documentation of amounts paid by insurance.
- Schedule A (Itemized Deductions) from 2018 IRS form 1040
- IRS Tax Return Transcript and W-2 forms for 2018 (obtain at IRS.gov/individuals/get-transcript)
- Household Size/Number in College form

Step 4: Complete all other requirements. (Log in to MyIvy, myivy.ivytech.edu, click the “Requirements” link in Financial Aid Links section of My Ivy Tech. Click the “Requirements, Verification Documentation and Financial Aid Authorization Forms” link. Select the aid year, then click the “Student Requirements” tab to see your requirements.)

Step 5: Submit this form and all required documents to your local Express Enrollment Center or the Financial Aid Office.

My signature below certifies that the information provided on this form and in the attached documents is true and accurate at the time this information is submitted to the Financial Aid Office. I agree to provide proof of the information if requested. I understand that the federal penalty for providing false or misleading information is a $10,000 fine, a prison sentence, or both.

<table>
<thead>
<tr>
<th>Student Signature</th>
<th>Date</th>
<th>Parent Signature (dependent students only)</th>
<th>Date</th>
</tr>
</thead>
</table>

SECTION 2: FINANCIAL AID OFFICE USE ONLY

<table>
<thead>
<tr>
<th>PROJECTED INCOME SOURCES</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student’s 2020 gross income from work (wages, salary, tips, business)</td>
<td></td>
</tr>
<tr>
<td>Spouse’s 2020 gross income from work (wages, salary, tips, business)</td>
<td></td>
</tr>
<tr>
<td>Parent 1 2020 gross income from work (wages, salary, tips, business) (Dependent students only)</td>
<td></td>
</tr>
<tr>
<td>Parent 2 2020 gross income from work (wages, salary, tips, business) (Dependent students only)</td>
<td></td>
</tr>
<tr>
<td>Other taxable income (pension, unemployment, alimony, etc.)</td>
<td></td>
</tr>
<tr>
<td>Child support received</td>
<td></td>
</tr>
<tr>
<td>Veteran’s non-education benefits</td>
<td></td>
</tr>
<tr>
<td>Other untaxed income (workers comp, IRA received) – Specify:</td>
<td></td>
</tr>
</tbody>
</table>

Total Estimated 2020 Income

- RRAAREQ
- RHACOMM
- XTENDER

- APPROVED
- ______ Old EFC
- ______ New EFC
- DENIED

FINANCIAL AID OFFICE SIGNATURE ________________________________ DATE ____________

EFFECTIVE 11/2018

Submit this form to your local Express Enrollment Center or the Financial Aid Office.
For contact information visit https://www.ivytech.edu/financial-aid/index.html.

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