



NORTHERN MICHIGAN UNIVERSITY

2023-2024 Special Circumstance Re-evaluation Parent Request

FINANCIAL AID
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****An incomplete form will delay processing.****

RVAL

Student Name _____ NMU IN _____

Step 1 – Verification of Current Free Application for Federal Student Aid (FAFSA) Data

Before re-evaluating your financial aid eligibility, we will need to verify the information submitted on your FAFSA is correct. To complete this process, you must submit the following documents if you have not already done so:

- 2023-2024 Dependent Student Household Verification Worksheet
- 2021 Tax Return Transcript for student (if required to file a return) or a **signed** copy of your 2021 Federal Income Tax Return, including Schedules 1, 2, and 3
- 2021 Tax Return Transcript for parent or a **signed** copy of your parents' 2021 Federal Income Tax Return, including Schedules 1, 2, and 3

Worksheets may be printed from: nmu.edu/financialaid/printableforms
Information on requesting tax transcripts can be found at: nmu.edu/financialaid/verification

Step 2 – Reason for Re-Evaluation Request and Documentation Requirements

Please be aware that a re-evaluation request does not guarantee an increase in your financial aid. Please provide a written statement explaining your circumstances, check the appropriate box below, and include the documentation listed.

Loss/Reduction of Employment or Retirement/Military Discharge

- Documentation from previous employer indicating dates of changes in employment status (letter, exit paperwork, DD214-Member 4 copy, etc.)
- Most recent or final paystub. Ten weeks must have elapsed since loss of employment
- IRS Tax Return Transcript for 2022 or a **signed** copy of their 2022 Federal Income Tax Return, including Schedules 1, 2, and 3
- 2021 and 2022 W-2 Forms
- Verification of unemployment benefits, if applicable
- Verification of severance package, pension, retirement benefits, etc.

Receipt of One-Time Income – Pension Withdrawal, Sale of Home, Etc.

- Documentation showing the source of the income (Form 1099-R, etc.)
- Verification showing how much of the one-time funding is still available and how funds were spent

Parent in College

- Verification of at least half-time enrollment
- Copy of financial aid award notification from parent's school (if applicable)
- Documentation of actual costs to attend school
- Signed statement indicating whether or not the parent is receiving any tuition reimbursement, and if so, the amount

Loss of Other Income – Unemployment Benefits, Child Support, Taxable Social Security Benefits, Etc.

- Statement from organization (unemployment office, Friend of the Court, Social Security) indicating when the income/benefits ended
- Verification of benefit amount received in 2021

Excessive Medical Bills/Insurance Premiums Paid Out of Pocket in 2021

- Schedule A from Form 1040 if expenses were itemized, or
- Copies of **paid** receipts/cancelled checks
- For insurance premium withheld from earnings, copy of a pay stub
- **Only include bills paid out of pocket, not those covered/reimbursed by insurance**

Death of a Parent

- Copy of Death Certificate
- Copy of student's Birth Certificate
- Copies of parent's 2021 and 2022 W-2 Forms (or other income documentation)

Other

- Provide a detailed explanation in your letter, as well as appropriate documentation
- Contact our office if you are unsure about what type of documentation to provide

Divorce/Separation

- Copy of divorce decree or verification of filing for divorce
- In the case of legal separation, documentation of separate households (lease, mortgage, utility bills)
- Copies of parent 2021 W-2 Forms or other income documentation to separate income if a joint return was filed

Although each family's situation is reviewed on an individual basis, the following reasons generally do not result in a change to financial aid eligibility: bankruptcy, foreclosure, private primary/secondary school tuition, or gambling winnings. Please feel free to contact our office to discuss your situation prior to submitting this form.

Be sure to complete and submit both pages of this form and required documentation. Include the student's name and NMU IN on all items submitted.

Student Name _____

NMU IN _____

Step 3 – Income Estimates

Provide income information (or best estimate) for the entire year requested - January 1 through December 31 Be sure to use amounts for the year, rather than monthly amounts.	2022		2023	
	Parent 1/ Step-Parent	Parent 2/ Step-Parent	Parent 1/ Step-Parent	Parent 2/ Step-Parent
Total Wages (include partial year amounts if individual is no longer employed but worked for part of the year)	\$	\$	\$	\$
Interest/Dividend Income	\$	\$	\$	\$
Unemployment Benefits	\$	\$	\$	\$
Severance Pay	\$	\$	\$	\$
Taxable Social Security Benefits (do not include untaxed amounts)	\$	\$	\$	\$
Child Support Received (include total to be received for all children as well as partial year amounts if benefits will stop or be reduced during the year)	\$	\$	\$	\$
Alimony	\$	\$	\$	\$
Worker's Compensation	\$	\$	\$	\$
Retirement Benefits	\$	\$	\$	\$
Insurance Benefits	\$	\$	\$	\$
Disability Benefits	\$	\$	\$	\$
Military or Clergy Housing/Food Allowances	\$	\$	\$	\$
Payments to Tax Deferred Pension/Savings Plans (paid directly or withheld from earnings)	\$	\$	\$	\$
Other (list source) _____	\$	\$	\$	\$
Total Income	\$	\$	\$	\$
Child Support you will PAY If you report child support to be paid, you must list the following: Name of person who will pay support: _____ Name of person to whom support will be paid: _____ Names of children for whom support will be paid: _____ _____	\$	\$	\$	\$
Alimony you will PAY	\$	\$	\$	\$

We will act on your request for re-evaluation only after receiving all verification and supporting documentation which confirms your circumstances. **Please be aware that a re-evaluation request does not guarantee an increase in your financial aid.** An increase in financial aid eligibility depends on the availability of funds and demonstrated financial need. A decision on your request may take several weeks to complete, and additional documents may be requested. All information will remain strictly confidential.

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date.

Student _____ Date _____

Parent _____ Date _____

WARNING: If you purposely give false or misleading information, you may be fined, be sentenced to jail or both.

Be sure to complete and submit **both pages** of this form and required documentation. Include the student's name and NMU IN on all items submitted.