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UTSA ID

Student's Last Name

Student's First Name

# 2009-2010 UTSA Parent Additional Expense Form

Office of Student Financial Aid and Enrollment Services (SFAES)
University of Texas at San Antonio, One UTSA Circle, San Antonio, Texas 78249-0687
1-800-669-0919 financialaid@utsa.edu www.utsa.edu/financialaid

**DOCUMENTATION SUBMITTED BY FAX OR EMAIL WILL NOT BE ACCEPTED**

Your Expected Family Contribution (EFC) has been determined from the income and asset information that you provided on the FAFSA. However, there may be unusual expenses that have not been factored into the general EFC calculation. For circumstances such as these, the Office of Student Financial Aid and Enrollment Services (SFAES) may be able to make adjustments for a more accurate calculation of your EFC. Please select from one of the following options if you have expenses that we may not have included or are of an extraordinary nature and submit the requested information.

**Parent(s) Name(s): _____**

**Please submit all documents at the same time, and write your student's name and your student's ID at the top of every document. Documentation may be submitted in person at the SFAES counter, via U.S. mail, or at our drop box location.**

## STEP 1: ATTACH A LETTER OF EXPLANATION

- Letter must provide details supporting your request along with your signature certifying the information

## STEP 2: VERIFYING ORIGINAL INFORMATION

As part of the special circumstance process, your financial aid file will first be reviewed to ensure that the original income information submitted on your 2009/2010 Free Application for Federal Student Aid (FAFSA) was correct. In this process, UTSA will be comparing information from the FAFSA with **signed copies of the student's and the parents' 2008 federal tax forms**. The law states we have the right to ask you for this information before disbursing federal aid. If there are differences between your FAFSA information and your financial documents, we may need to send in corrections on your Student Aid Report (SAR) and have a new SAR processed with the correct information before we can make any adjustments to your income due to additional expenses. Failure to submit the required documentation will delay processing of your file.

**Required Documentation:**

- **Signed copies of all 2008 income tax forms** for student and parent(s).

*UTSA must review the requested information under the financial aid program rules (34 CFR, Section 668)*

## STEP 3: FAMILY INFORMATION

**Write the names of all family or household members below.** Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

**Include people as part of your family or household below only if:**

- They lived with your parents and got more than half their support from your parents at the time you completed your student aid application, AND
- They will continue to get more than half their support from July 1, 2009 through June 30, 2010.

| Full Name | Age | Relationship | College |
|---|---|---|---|
| *Example: Missy Jones* | *7* | *Sister* | |
| | | | |
| | | | |
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**STEP 4: INCOME INFORMATION AND/OR TAX FORMS – Non-tax filers must complete A, C and D. Tax filers must complete B, C and D. Do not leave any blanks; enter zero if the amount is zero.**

**A. All non-tax filers must check the box(es) for those persons who did not file and were not required to file a 2008 Federal Income Tax Return.**

☐ You ☐ Your Parents ☐ Father/Stepfather ☐ Mother/Stepmother

If a tax return was not filed, but income was received from work in 2008, list that income below and submit the W-2 form(s) or other earnings statement(s) if available.

| Name(s) of employers who paid wages in 2008: | Student Amount | Parent(s) Amount |
|---|---|---|
| | | |
| | | |
| | | |

**B.** All tax filers must submit a **signed copy of all 2008 Federal Income Tax returns** (e.g., 2008 IRS Form 1040 or 1040A or 1040EZ or a tax return from Puerto Rico or a foreign income tax return). If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy of an IRS form that lists tax account information. All tax filers must check the box(es) for those persons who did file 2008 Federal Income Tax Return.

☐ You ☐ Your Parents' Joint Return ☐ Father/Stepfather ☐ Mother/Stepmother

**C. Both tax filers and non-tax filers must list the following income *received, credited, or paid* in 2008. Please refer to FAFSA Questions 46 & 94.**

| 2008 Income/Credit/Paid | Student Amount | Parent(s) Amount |
|---|---|---|
| Child Support **Paid** | | |
| Taxable earnings from Fellowships, Federal Work-Study, or other need-based work programs | | |
| Combat Pay Reported as income on return | | |

**D. Both tax filers and non-tax filers must list any untaxed income *received* in 2008. Refer to FAFSA Questions 47 & 95.**

| 2008 Untaxed Income | Student Amount | Parent(s) Amount |
|---|---|---|
| Taxed Deferred Pensions (W2 Box 12; Codes D, E, F, G, H, or S) | | |
| Child Support **Received** | | |
| Military/Clergy Housing and Food Allowances | | |
| VA Non-Education Benefits | | |
| Other Untaxed/Non-Reported Income | | |

**PRIVACY NOTICE**

With a few exceptions, you are entitled to be informed about the information U.T. San Antonio collects about you. Under Sections 552.021 and 552.023 of the Texas Government Code, you are entitled to receive and review this information. Under Section 559.004 of the Texas Government Code, you are entitled to have U.T. San Antonio correct information about you that is held by us and that is incorrect, in accordance with the procedures set forth in the University of Texas System Business Procedures Memorandum 32. The information that U.T. San Antonio collects will be retained and maintained as required by Texas records retention laws (Section 441.180 et seq. of the Texas Government code) and rules. Different types of information are kept for different periods of time.

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**STEP 5: CHECK THE BOX FOR THE EXPENSE(S) YOU ARE REQUESTING AND ATTACH THE ADDITIONAL REQUIRED DOCUMENTATION PER SITUATION**

☐ **PRIVATE SCHOOL TUITION EXPENSES:**

- Attach a copy of receipt or bill indicating the amount paid monthly for private tuition costs for children in elementary through secondary grades. If the receipt or bill does not indicate any of the school's information, please provide confirmation of tuition on the schools letterhead with the contact information of school. In your letter of explanation, include the names and ages of children.

☐ **EXTENDED FAMILY SUPPORT:**

Financial support to relatives that have not already been counted as members of your household may be considered.

- In your letter of explanation, detail the type of support and dollar amount you will be contributing during the current school year. Also include the names and relationships of the extended family members and from what source you will finance this support.
- Provide documentation to support the explanation in the letter.

☐ **UNUSUAL DEBTS:**

**Only non-discretionary expenses can be considered and are only considered unusual if they exceed 12% of the family's income.** Unusual debts can include but are not limited to expenses from failed businesses, education loans, non-discretionary personal debts, card debts for living expenses due to unemployment **(does not include credit card debts used for recreational purposes)**, and legal fees for divorce or adoption.

- Include photocopies of receipts of bills incurred since the first day of the Fall semester (for those beginning enrollment in the Fall) or the first day of the Spring semester (for those beginning in the Spring). **This circumstance will not be reviewed if the expense occurred before the first day of the semester in which you want the increase to be considered.**

☐ **UNUSUAL MEDICAL/DENTAL/OPTICAL EXPENSES:**

**Medical expenses are only considered unusual if they exceed 11% of the family's income.**

- Attach photocopies of paid receipts for medical bills incurred since the first day of the Fall semester (for those beginning enrollment in the Fall) or the first day of the Spring semester (for those beginning in the Spring **This circumstance will not be reviewed if the expense occurred before the first day of the semester in which you want the increase to be considered.**

☐ **OTHER EXPENSES:**

- Attach photocopies of paid receipts for bills incurred since the first day of the Fall semester (for those beginning enrollment in the Fall) or the first day of the Spring semester (for those beginning in the Spring) for other additional expenses not included in the above categories. Please provide any additional details of your circumstance in the letter of explanation. **This circumstance will not be reviewed if the expense occurred before the first day of the semester in which you want the increase to be considered.**

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**STEP 6: COMPLETE CERTIFICATION STATEMENT**

***Your signature on this document confirms your acknowledgement of the following:***

- The information submitted for review is true and correct to the best of your knowledge.
- You have read each section and have provided the required documentation.
- Providing false information may result in reduced eligibility, repayment of aid, or both, in this year or next year.
- Changes resulting from this review do not guarantee an increase in aid.
- Additional documentation may be required.
- During peak processing times, there may be a four week processing time for request.
- Status of the request will be e-mailed to your UTSA e-mail account.

Parent Signature:_____ Date: _____

Student Signature:_____ Date: _____

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