@ | | | | | | | | |
UTSA ID

Student's Last Name

Student's First Name

2009-2010 UTSA Parent Loss of Income

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

Parent(s) Name(s): _____

Parents(s)/Stepparent(s) may use this form to report changes that have occurred since filing the 2009-2010 Free Application for Federal Student Aid (FAFSA). After completing all 7 steps of this form, please return it along with all required supporting documentation to the Office of Student Financial Aid and Enrollment Services (SFAES).

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: 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 FAFSA was correct. In this process, UTSA will be comparing information from your 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 loss of income adjustments to your financial aid application. 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 2: 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	*24*	*Wife*	*UTSA*

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STEP 3: 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		

STEP 4: ATTACH A LETTER OF EXPLANATION

- A detailed letter explaining your special circumstances and date your income was reduced

STEP 5: COMPLETE CHANGE OF INCOME CHART

Income calculations are from January 2009 through December 2009. **If you do not know what your gross earnings will be for any portion of 2009, estimate how much you expect to earn.**

Father's Projected 2009 Income *(Wages, Salaries, Tips, and Bonuses)*	$
Mother's Projected 2009 Income *(Wages, Salaries, Tips, and Bonuses)*	$
Other 2009 Taxable Income (Alimony, dividend/interest income, unemployment compensation, or trust/investment income)	$
2009 Non-Taxable Income (Pensions, annuities, social security, AFDC, or child support received)	$

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STEP 6: CHECK THE BOX FOR THE REASON(S) YOU ARE REQUESTING AN INCOME ADJUSTMENT AND ATTACH THE ADDITIONAL REQUIRED DOCUMENTATION PER SITUATION

☐ **Loss of parent income from work due to layoff, termination, or reduction of hours:**

- Documentation from former employer confirming loss of income and date of separation.
- Copy of last pay stub from previous job showing year to date earnings.
- Copy of most recent pay stub from current job (if applicable).

☐ **Loss of Unemployment Compensation:**

- Letter from unemployment office stating start/end dates and benefit amount.

☐ **Loss of Child Support:**

- Letter or court document stating the start/end dates and amount.

☐ **Loss of Workers Compensation Benefits:**

- Letter from Bureau of Workers Compensation stating start/end dates and benefit amount.

☐ **Death of Spouse:**

- Copy of death certificate.

☐ **Divorce, or Separation:**

- Letter of explanation that includes the following:
  - date of divorce/separation if it occurred after filing the FAFSA.
  - list current household members, relationship and age
  - monthly child support you will receive in 2009
  - other assets you will receive in 2009 based upon divorce decree (provide a copy of your divorce decree).

☐ **A one-time, nonrecurring income received during 2008:**

- Documentation identifying the source of income, how the funds were spent, and the amount of remaining funds if any.

☐ **Other:**

- Detailed letter and documentation to support the circumstance.

STEP 7: 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.
- Underestimating the projected income could 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 upon request.
- During peak processing times, there may be a four week processing time for the request.
- Status of the request will be e-mailed to the student's UTSA e-mail account.

Student Signature:_____ Date:_____

Parent Signature:_____ Date:_____

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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