WHAT IS A SPECIAL CIRCUMSTANCES RE-EVALUATION?

Special Circumstances Re-Evaluation refers to the process of reviewing your financial aid application when you and/or your parent(s) or spouse experience a change in income or expenses that was not reflected on your 2016–2017 Free Application for Federal Student Aid (FAFSA). When you apply for financial aid, income and asset information is used to determine how much can be contributed toward your educational expenses. Re-Evaluation may be appropriate when changes in income or assets are significant enough to result in increased aid eligibility.

Please note: Students enrolled in hours exceeding the standard budgets (15 for undergraduate students and 9 for graduate students need only submit a signed statement to request a review of the COA for additional tuition expenses.

WHAT ADJUSTMENTS MAY BE CONSIDERED?

Category 1 – Adjustments may be considered for loss of income* for the following reasons (FAFSA changes):
- Job termination/change/reduction of hours worked or retirement
- Marriage/divorce/separation/death of spouse after FAFSA filing
- Loss or reduction of taxable Social Security benefits
- Loss or reduction of child support/alimony received
- Child support paid
- Adjustments to parent income for non-discretionary medical/dental/disability expenses paid during the tax year (must exceed 11% of the “Income Protection Allowance” – see page 18 of the 2016-17 EFC Formula

Category 2 – Adjustments may be considered for increases of the following types of mandatory or non-discretionary student PAID expenses during the academic year:
- Medical/dental/disability expenses paid by the student during the academic year
- Additional required educational expenses
- Additional transportation expenses
- Childcare expenses*
- Computer purchases**
- Food and shelter for dependents of independent students (certain income requirements must be met)
- Other non-discretionary expenses

*If you are a student with childcare expenses, you should complete the Child Care Budget Adjustment and Grant Application, available in our office on September 1, 2016, rather than a Special Circumstances Re-Evaluation Request.
**If you have recently purchased a computer for use during the 2016-17 academic year, you should submit the Computer Budget Adjustment Request form, available online at affordability.ku.edu/forms

HOW DO I REQUEST A SPECIAL CIRCUMSTANCES RE-EVALUATION?

1. Complete a 2016-17 Free Application for Federal Student Aid (FAFSA) online at fafsa.ed.gov, AND
2. If requesting any changes to your FAFSA, contact Financial Aid and Scholarships (FAS) to schedule an appointment with a Financial Aid Counselor. If the Financial Aid Counselor determines that a Special Circumstances adjustment could benefit you, the request form will be provided at that appointment. The deadline to submit the 2016-17 Special Circumstances Re-Evaluation Request form (FAFSA changes) is March 1, 2017. If requesting a change to the student’s cost of attendance (budget), fill out the Special Circumstances (Budget Adjustment) form, available online at affordability.ku.edu. The deadline to submit this form is April 1, 2017.
3. If requested, submit necessary supporting documentation. Additional documentation should not be submitted unless specifically requested by FAS.

Please note: Special Circumstances can only be considered when documentation is provided that will satisfy a review by federal auditors.

HOW LONG WILL IT TAKE?

Your request for a Special Circumstances Re-Evaluation cannot be processed until your original application for financial aid has been completed and verified (if requesting a change to the FAFSA). Please allow up to four to six weeks for processing the request after your original application has been processed and all the required documentation has been received.

WILL I GET MORE AID?

If Re-Evaluation results in increased eligibility for aid and if funds are available, you may receive additional assistance. If your Special Circumstances Re-Evaluation request results in increased eligibility, you may be asked to provide documentation (federal income tax documents) at the end of the calendar year to verify the accuracy of your income projections or projected expenses. If changes need to be made and these changes result in reduced eligibility, you may have to repay aid.