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UTSA ID

Student's Last Name

Student's First Name

UTSA Parent Additional Expenses Form 2008-2009

University of Texas at San Antonio – One UTSA Circle - San Antonio- Texas- 78249-0687 - (210) 458-8000
FinancialAid@UTSA.edu www.utsa.edu/financialaid/

Your Expected Family Contribution 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 Expected Family Contribution calculation. For circumstances such as these, the Office of Student Financial Aid and Enrollment Services may be able to make adjustments for a more accurate calculation of your Expected Family Contribution. 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.

Student Name: _____ **UTSA ID:** @_____

Parent Name: _____

Please submit all documents at the same time, and write your name and Student ID at the top of every document. Documentation may be submitted in person at the Enrollment Services counter, via U.S. mail, or at our drop box location. Documentation submitted via FAX cannot be accepted and the documents will have to be resubmitted.

STEP 1: VERIFICATION

As part of the special circumstance process your financial aid application will be reviewed in a process called "verification". In this process, UTSA will be comparing information from your FAFSA application with **signed copies of your and your parents' 2007 federal tax forms**. The law states we have the right to ask you for this information before awarding federal aid. If there are differences between your application information and your financial documents, we may need to send in corrections on your Student Aid Report (SAR) and have a new SAR processed. Failure to submit the required documentation will delay processing of your file.

Required Documentation:

- **Copies of all 2007 signed income tax forms and copies of all 2007 W2's** for the parent and student.

UTSA will compare information on these documents. We may need to make corrections on your SAR and send it back to the application processor. *UTSA must review the requested information, under the financial aid program rules (34 CFR, Section 668)*

A. Family Information

Dependent Students: List the people that your parents will support between July 1, 2008 and June 30, 2009. Include yourself, your parents, and your parents' dependent children (if your parents provide more than half support, or if they would be required to give parental information when applying for federal student aid).

Include other people as part of your family 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, 2008 through June 30, 2009.

Write the names of all family members. Also write in the name of the college for any family member who will be attending college at least half-time between July 1, 2008 and June 30, 2009, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Example: Missy Jones	*24*	*Wife*	*UTSA*

B. Tax Forms and Income Information

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All tax filers must submit a **signed copy of all 2007 Federal Income Tax returns** (Includes 2007 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return) and **copies of all 2007 W2's**. If you did not keep a copy of the tax return, request a copy from you tax preparer or a copy of an IRS form that lists tax account information.

Dependent students, please check and return to UTSA all **signed Tax returns and copies of all W2's** that apply:

Your own Your Father's Your Mother's Parents' joint return

All non-tax filers must check the box for those persons who did not file and were not required to file a 2007 Federal Income Tax Return.

Your own Your Father Your Mother

If a tax return was not filed, but income was received from work in 2007, list that income below and submit the W-2 form(s) or other earnings statement(s) if available.

Name of Employer(s)	**Student Amount**	**Parent(s) Amount**

Both tax filers and non-tax filers must list any untaxed income *received* in 2007.
Please refer to FAFSA Worksheet A&B

2007 Untaxed Income	**Student Amount**	**Parent(s) Amount**
Child Support **Received**		
Untaxed Social Security Benefits		
Welfare Benefits		
Worker's Compensation		
Other (401K, Pension plans, etc.)		

Both tax filers and non-tax filers must list the following income *received, credited, or paid* in 2007.
Please refer to FAFSA Worksheet C

2007 Income/Credit/Paid	**Student Amount**	**Parent(s) Amount**
Child Support **Paid**		
Education Credits (Hope & Lifetime Learning) from 1040 tax return		
Taxable earnings from Federal Work-Study or other need-based work programs		
Student grant, scholarship, fellowship, & assistantship aid, reported to IRS in **adjusted gross income** line from 1040 tax return(s)		

STEP 2: ATTACH A LETTER OF EXPLANATION

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

STEP 3: CHECK 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.

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UTSA ID Student's Last Name Student's First Name

❑ **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, 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).

❑ **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).

❑ **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.

STEP 3: 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 upon request.
- ➢ There is approximately a four week processing time for the request.
- ➢ Status of the request will be e-mailed to your UTSA e-mail account.

Parent Signature:____ Date:____________________________

Student 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.