



2023-2024 SPECIAL CIRCUMSTANCES REQUEST FORM

FIRST NAME	LAST NAME	STUDENT ID

INSTRUCTIONS:

According to federal laws and regulations, a family's 2021 income is used to assess financial need for the 2023-2024 school year. However, if a family's expected 2022 income is lower, due to special circumstances, a financial aid administrator, under professional judgment, may be able to use the 2022 or 2023 estimated income to assess financial need. Students who transfer from one school to another must understand that professional judgment decisions DO NOT transfer from one school to another. The federal system will use the original "base year" data and our office, by regulation, cannot accept another school's decision. Making a request does not ensure the request will be approved. Please provide information regarding your reduction in income by completing this form and providing the requested documentation. We can only substitute the 2021-year income with income received during 2022 or 2023.

Indicate family member that experienced the loss of income due to special circumstances:

- Father/Step-father
 Mother/Step-mother
 Student/Self
 Student's Spouse

All applicants **MUST** include the following. A Professional Judgment will not be considered until all required documents are provided.

1. A completed and signed **Special Circumstances Request Form**
2. Write a **detailed letter** explaining how your family's financial circumstances have changed, meeting one of the specified criteria listed below, sign, and date letter.
3. Attach **W-2's for 2021 & 2022**, including yours/your spouse's and/ or parent's.
4. Attach **signed Federal Tax Return and all filed Schedules (1-3)** for 2021 & 2022, including yours/ your spouse's and/or parent's.
5. Attach all completed **2023-2024 Verification (Independent or Dependent) Worksheet**.

You **MUST** present your completed special circumstance form and all required documentation to the Financial Aid Office. Financial Aid Director responds to all requests in writing within 10 school days from the receipt of your request. All documentation must be received for special circumstance request to be reviewed or considered.

Please indicate the reason for your parent's (if dependent) and/or your spouse's (if independent) change in income. Place an X next to each item that applies and attach the required documentation.

- Loss of income from work. Provide proper documentation.
 Layoff. Provide a letter from employer stating effective date and anticipated return.

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- Plant Closing. Provide a letter from employer stating effective date.
- Termination. Provide a letter from employer stating effective date. If this is not available, provide documentation from your local unemployment office.
- Disability. Date of disability (m/d/yr) _____. Attach documentation of the disability.
- Loss of taxable income. Provide proper documentation.
- Alimony. Provide court document(s) stating termination date of benefit.
- Unemployment. Provide a letter from the unemployment office stating termination date of benefit.
- Loss of untaxed income. Provide proper documentation.
- Child Support. Provide a Letter or court document stating termination date of benefits.
- Worker's Compensation. Provide a letter from Bureau of Worker's Compensation stating termination date of benefits

Other Special Circumstances: Place an X next to each item that apply and attach the required documentation.

Decrease to the Adjusted Gross Income:

- Medical or dental expenses you, your spouse or your parents have PAID for the 2021 or 2022 calendar year that are not covered by insurance and these expenses exceeds 11% of your total income. Provide a copy of Schedule A of 2021 or 2022 Federal tax return(s) or copies of canceled checks for 2021 or 2022 and confirmation of total amount paid by insurance in 2021 or 2022.
Nursing home expenses for household family members paid out of pocket and NOT covered by health insurance or reimbursed by a third party. Provide documentation of expenses PAID for 2021 or 2022.
- Conversion of a regular IRA into a Roth IRA for the 2021 or 2022 tax year. Provide proper documentation.

Changes to the Number in College:

- Parents can be included in the number in college if they are enrolled at least half-time (6 hours) in a degree, certificate, or other program leading to a recognized educational credential at an institution with a program participation agreement under section 487, 34 CFR 668.14. They must be enrolled during the 2023-2024 academic year. Provide a Verification of Enrollment from the Registrar's or Admission's Office of the institute your parent(s) attend

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Separation/Divorce or Death:

(Only complete this section if this occurred since completing the 2023-2024 FAFSA or you and your spouse or your parents filed a joint tax return.)

- Separation from Spouse or Separation of Parents. Date of Separation: _____

Physical Address of each person involved in the separation:

A. Person #1-Name and Address:

B. Person #2-Name and Address:

Attach any legal documents/letters relating to the separation.

- Divorce-Attach final divorce decree.
- Death of a parent or spouse. Attach a copy of the death certificate or obituary.

2022 YEAR-TO-DATE INCOME CALCULATION

Please list your/your spouse's and/or parent's, if applicable, year-to-date income received from January 1, 2022 through December 31, 2022. (Attach your/your spouses and/or parent's 2022 Federal Tax Return Transcript and 2022 Wage and Income Transcript.)

Year:	Parent's		Student and/or Spouse	
	2022	2023 (Estimated)	2022	2023 (Estimated)
Earnings from work (Salary, Wages and Tips):	\$	\$	\$	\$
Unemployment Benefits:	\$	\$	\$	\$
Worker's Compensation:	\$	\$	\$	\$
IRA/Pension Distributions:	\$	\$	\$	\$
Welfare Benefits (TANF but not food stamps):	\$	\$	\$	\$
Child Support Received:	\$	\$	\$	\$
Alimony:	\$	\$	\$	\$
Other Taxed Income (Dividend Interest, Business Income, etc.):	\$	\$	\$	\$
Other Untaxed Income (Veterans Non- education Benefits, Death Pensions, Money received from friends/family, etc.):	\$	\$	\$	\$
Total Income:	\$	\$	\$	\$

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Report all income you have actually received from January 1, 2022 through December 31, 2022.

YOU MUST ATTACH DOCUMENTATION OF ALL INCOME. Failure to provide documentation to validate the change in your household financial situation will result in the denial of the special circumstance request.

My signature below certifies that the information provided above is true. I agree to provide proof of the information if requested. I understand that the penalty for providing false or misleading information is a \$20,000 fine, a prison sentence, or both. I understand that this information is for the 2023-2024 academic year.

I also understand the financial aid administrator will make a decision based upon the documentation provided and that the decision is final and cannot be appealed to any agency, including the U. S. Department of Education.

Parent's Signature (dependent)	Date
Student Signature (independent)	Date

For Office Use Only

_____ Accepted per professional judgement based on submitted documentation

_____ Denied per professional judgment based on submitted documentation

Comments

Student	2022/2023 AGI	2022/2023 Taxes Paid	2022/2023 Untaxed Income
Parent(s)	2022/2023 AGI	2022/2023 Taxes Paid	2022/2023 Untaxed Income
ISIR Trans #	Old EFC	New EFC	

Signature of Financial Aid Professional	Date
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