

2022-2023 Special Circumstances and Acceptable Documentation

Financial Aid administrators are required to document Special Circumstances decisions and must maintain that documentation in the student's file. Students seeking a Special Circumstances review must complete a Financial Aid Appeal Form where they attest to the basis on their appeal and provide relevant details, then attach the required documentation based on the reason for their appeal. The Financial Aid Appeal Form serves as a source document when reviewing students for a Special Circumstance decision. Information on the Financial Aid Appeal Form is self-certified by the student.

Basis For Appeal	Examples of Acceptable Documentation Include, But Are Not Limited To
Change in employment/reduction in income	<ul style="list-style-type: none">1) Last pay stub with year-to-date earnings from former employer (2022 changes only)2) <u>Signed</u> copy of the unemployed person's 2021 Federal Tax Return (Form 1040) with all Schedules3) Copy of unemployed persons and their spouse's 2021 W2 forms and/or 1099 forms, or the unemployed person's Wage and Income Transcript from the IRS https://www.irs.gov/individuals/get-transcript4) Proof of unemployment
Retirement	<ul style="list-style-type: none">6) Termination notice or resignation/retirement acknowledgment from employer7) Last pay stub with year-to-date earnings8) Benefits statement from Social Security Administration, or pension agency Severance pay notice9) <u>Signed</u> copy of the retired person's 2021 Federal Tax Return (Form 1040) with all Schedules10) Copy of the retired persons and their spouse's 2021 W2 forms and/or 1099 forms

Death of a Parent/Spouse	<ul style="list-style-type: none"> 1) Copy of the death certificate or obituary 2) Signed copy of the deceased individual's 2020 Federal Tax Return (Form 1040) with all Schedules 3) Copy of deceased person's and their spouse's 2020 W2 forms and/or 1099 forms or the surviving spouse's Wage and Income Transcript from the IRS https://www.irs.gov/individuals/get-transcript 4) Copy of Life Insurance or Death Benefit info
Loss of Untaxed/Taxed benefit	Proof of Loss of Benefit in 2021 or 2022

Widow/Divorced/ Separated	<ul style="list-style-type: none"> 1) Signed copy of the separated/divorced person's 2020 Federal Tax Return (Form 1040) with all Schedules 2) Copy of the separated/divorced persons and their spouse's 2020 W2 forms and/or 1099 forms or the separated person's Wage and Income Transcript from the IRS https://www.irs.gov/individuals/get-transcript. 3) Copy of Divorce or Separation agreement
One-Time Payments	Signed copy of the impacted individual's 2020 Federal Tax Return (Form 1040)
Unreimbursed Medical/Dental/Nursing Home Expenses	<ul style="list-style-type: none"> 1) Signed copy of the impacted individual's 2021 Federal Tax Return (Form 1040) with all applicable Schedules, <u>including IRS Schedule A</u>, if filed 2) Proof of medical/funeral expenses paid out of pocket in 2021 or 2022

Parent Enrollment in College	Student attestation on Financial Aid Appeal Form
Natural Disaster or Other Unforeseen Circumstances	1) Narrative statement from student explaining the circumstances and documentation (by a third-party, if possible) substantiating the Special Circumstances 2) Signed copy of the impacted individual's 2021 Federal Tax Return (Form 1040)
K-12 Private Education Tuition	1) Copy of tuition bill, enrollment contract, or financial agreement stating the name of the K-12 school and the name of the student 2) Signed copy of the responsible party's 2020 Federal Tax Return (Form 1040)
Unusually High Childcare or Dependent Care Costs	1) Copy of childcare or dependent care bill/invoice 2) Copy of child care/dependent care contract with payment amount
Disability – permanent or Long Term (6 months or greater) after 2020	1) Physician signed letter regarding disability length 2) Last pay stub with year-to-date earnings 3) Monthly disability statement from the SSA and/or private insurance company

Please be advised that you may be required to submit additional documentation to complete the process.