

2022-2023 Application for Special Circumstance Consideration – Independent Students

Student's Name (Last) _____ (First) _____ M _____ BearPass # _____ Student's Date of Birth _____

The deadline for submitting this application is April 21, 2023. If your EFC is already 0, do not submit this form.

COMPLETE SECTIONS A & C. COMPLETE SECTION B IF REQUESTED IN SECTION A.

Before completing this form, please visit our [Special Circumstance Guidelines](#) page. This form does not guarantee a change in financial aid, nor will it extend payment due dates. You will be responsible for your account balance.

| A. Circumstances (Check all that apply) | Documentation Required |
|---|---|
| <input type="checkbox"/> Your/your spouse's 2021 Adjusted Gross Income (AGI) is significantly less than their 2020 AGI | 1. Signed 2021 federal tax return (<i>Form 1040</i> and <i>Schedules 1-3</i> , if used) 2. 2021 W-2s 3. Brief signed explanation of why AGI is lower in 2021 |
| <input type="checkbox"/> Loss or Change in employment continuous for 8+ weeks Will wage earner return to work in 2022? <input type="checkbox"/> Yes <input type="checkbox"/> No | 1. Letter from employer concerning loss/change in job status 2. Signed 2021 federal tax return (<i>Form 1040</i> and <i>Schedules 1-3</i> , if used) 3. 2021 W-2s 4. Complete <i>Section B</i> below |
| <input type="checkbox"/> Someone in your household received public assistance in 2020, 2021, or 2022, or is currently a dislocated worker | Complete and return the Public Assistance or Dislocated Worker worksheet instead. <u>Do not submit this worksheet.</u> |
| <input type="checkbox"/> Divorced/separated after FAFSA was filed | 1. Court document or notarized statement indicating the date the marriage was severed 2. Signed 2020 federal and state tax returns 3. All 2020 W-2s 4. Independent Verification Worksheet 5. Asset Information Worksheet |
| <input type="checkbox"/> Spouse on FAFSA deceased Will you receive survivor benefits? <input type="checkbox"/> No <input type="checkbox"/> Yes | 1. Copy of death certificate 2. Signed 2020 federal and state tax returns 3. All 2020 W-2s 4. Survivor benefits statement (if applicable) |
| <input type="checkbox"/> Unemployment benefits reported on the FAFSA have ended <i>Note: The IRS allowed \$10,200 per person in unemployment benefits to be excluded from the 2020 federal tax return. A special circumstance will not be made if each recipient received less than \$10,200 in unemployment benefits in 2020, and did not receive benefits in 2021.</i> | 1. If your benefits were reported on your 2020 or 2021 federal tax return have since ended: 1a. Copy of your 2020 or 2021 Federal Tax Return 1b. Notice from agency reflecting the date benefits ended with the total amount received 1c. Brief summary explaining your situation OR 2. If your benefits were reported on your 2020 federal tax return and you have received benefits within the last 90 days 2a. Copy of weekly benefits summary from agency indicating dollar amount and date funds were received within the last 90 days. 2b. Signed/dated statement confirming you are still unemployed. |
| <input type="checkbox"/> Expenses paid in 2021 for private or parochial school(s) for household members reported on FAFSA, and not reimbursed by scholarships, grants, employers, etc. | 1. Private Tuition Payment Verification Form 2. Signed 2021 federal tax return (<i>Form 1040</i> and <i>Schedules 1-3</i> , if used) 3. 2021 W-2s |
| <input type="checkbox"/> Medical or dental expenses paid in 2021 that were not reimbursed by insurance/third party. | 1. Signed 2021 federal tax return (<i>Form 1040</i> and <i>Schedules 1-3</i> , if used) 2. 2021 W-2s 3. Copies of receipts paid in 2021 and a summary of amounts <i>paid</i> by you or your spouse in 2021 (not paid by insurance or an outstanding balance) |
| <input type="checkbox"/> Child support payments reported on FAFSA have ended or been reduced in 2022 | Court or Child Service Agency documentation stating benefit ending date and amount received in 2022 for each child |

| | |
|--|--|
| <input type="checkbox"/> Other - Any circumstance not listed above that will cause 2022 taxed or untaxed income to be significantly less than the 2020 income reported on the FAFSA. | <ol style="list-style-type: none"> 1. Complete <i>Section B</i> below 2. A written summary fully explaining circumstance, including why funds are not available for educational expenses. 3. Supporting documents (paystubs, signed tax forms, third-party letters, etc.) |
|--|--|

B. 2022 Gross Earned Income, Untaxed Income, and Other Benefits

Attach the documents used (e.g., your most recent year-to-date pay stub, etc.) to estimate your 2022 *pre-tax* income, along with a written summary of how you calculated your 2022 estimated income listed below.

Example: [Rate of Pay] X [hours you work in a pay period until December 31, 2022] = Estimated 2022 income from work

| Calendar Year Income Type | Student | Spouse |
|---|-----------|-----------|
| Estimated or actual pre-tax wages earned in 2022 | \$ | \$ |
| 2022 Unemployment benefits | \$ | \$ |
| 2022 Disability benefits. Are these taxable? <input type="checkbox"/> YES <input type="checkbox"/> NO | \$ | \$ |
| 2022 Child support received/expected: \$_____ X # _____ months | \$ | \$ |
| Other untaxed 2022 income. Source: _____ | \$ | \$ |
| Other taxable 2022 income (expected interest, dividends, alimony, capital gains, etc.). Source: _____ _____ | \$ | \$ |
| Total 2022 taxed and untaxed income | \$ | \$ |

C. Certification & Signatures

By signing below, I acknowledge that I have attached all supporting documentation and that all information submitted is accurate and true to the best of my knowledge. Information provided may be discussed with the student and/or parent as necessary. I have read the [Special Circumstance Guidelines](#) and understand that submitting this form does not guarantee that my request will be granted.

Student's Ink-Signature: _____ Date: _____

Spouse's Ink-Signature (if applicable): _____ Date: _____

D. For Office Use

1st Reviewer: _____ Decision: _____ Approved _____ Denied _____ Delayed _____

2nd Reviewer: _____ Decision & Date: _____

3rd Reviewer: _____ Decision & Date: _____

2020 AGI: _____
 2020 Tax Paid: _____
 2020 Untaxed: _____
 2020 P1 Wages: _____
 2020 P2 Wages: _____
 2020 ST Wages: _____
Original EFC: _____

Special Circ. AGI: _____
 Special Circ. Tax Paid: _____
 Special Circ. Untaxed: _____
 Special Circ. P1 Wages: _____
 Special Circ. P2 Wages: _____
 Special Circ. ST Wages: _____
Special Circ. EFC: _____