



2023-2024 Special Circumstance Request Form

Student Name: _____ Student ID Number: _____

This request is used to adjust the income reported on the 2023-2024 Free Application for Federal Student Aid (FAFSA) due to a change of circumstances during the calendar or academic year. If you are a Pennsylvania resident, you should also notify PHEAA of your special condition by calling 1-800-692-7392. Please note: Only one Special Circumstance Request Form will be completed per award year.

Step 1: All students MUST submit the following documentation, regardless of their reason for filing a Special Circumstance Request:

<p style="text-align: center;"><u>DEPENDENT STUDENTS</u></p> <ul style="list-style-type: none"> ✓ Current Pay Statement showing YTD income for everyone in the household currently working ✓ Statements for all untaxed benefits ✓ Signed copy of your 2021 Tax Return ✓ Transcript ✓ Signed copy of your parent's 2021 Tax Return ✓ Transcript 	<p style="text-align: center;"><u>INDEPENDENT STUDENTS</u></p> <ul style="list-style-type: none"> ✓ Current Pay Statement showing YTD income for everyone in the household currently working ✓ Statements for all untaxed benefits ✓ Signed copy of your 2021 Tax Return Transcript
--	---

**Review the following for your circumstance and the required documentation
(Incomplete forms will not be processed)**

<p><u>REDUCED INCOME OR LOSS OF EMPLOYMENT</u> – Student/Spouse/Parent was working during 2021 but is now working fewer hours or is unemployed. The following documentation is required from the unemployed household member:</p> <ul style="list-style-type: none"> ✓ Last check stub(s) from previous employer showing YTD income earned to date ✓ Letter from previous employer stating the date of termination ✓ Unemployment benefit or denial letter
<p><u>LOSS OF BENEFITS</u> - Student/Spouse/Parent has lost some or all benefits. The following documentation is required:</p> <ul style="list-style-type: none"> ✓ Last check stub(s) or printout of benefit(s) received ✓ Letter from agency verifying date and amount of benefit(s) lost
<p><u>DEDUCTION OF ONE-TIME PAYMENT</u> – Student/Spouse/Parent received a ONE-TIME PAYMENT (pension, IRA, annuities, gambling winnings, settlement, etc.) The following documentation is required:</p> <ul style="list-style-type: none"> ✓ Explanation as to why the one-time payment is not available to be used for education related expenses ✓ Receipt(s) showing where one-time payment was spent ✓ Please note: consideration will be given if one-time payment was used to pay off credit card or auto loan debt however it may not constitute a special circumstance
<p><u>SEPARATION OR DIVORCE</u> – Student/Parent was married when the FAFSA was filed but has now separated or divorced. The following documentation is required:</p> <ul style="list-style-type: none"> ✓ Court documentation verifying legal separation or divorce ✓ In the case of separation, please provide a MINIMUM of two (2) utility bills from each parent that clearly shows name and street address. Examples of acceptable utility bills would be cable/internet, electric, gas, garbage or water.
<p><u>PRIVATE ELEMENTARY/HIGH SCHOOL TUITION</u> – Report private elementary, junior high and/or high school tuition actually paid in 2022-2023 award year for family members other than the applicant.</p> <ul style="list-style-type: none"> ✓ invoice or statement from the school(s) showing payments made
<p><u>DEATH OF A PARENT OR SPOUSE</u> – Parent/Spouse passed away after the FAFSA was filed. The following documentation is required:</p> <ul style="list-style-type: none"> ✓ Copy of Death Certificate
<p><u>UNUSUAL EXPENSES</u> – Student/Spouse/Parent has unusual medical or dental expenses NOT covered by insurance. The following documentation is required:</p> <ul style="list-style-type: none"> ✓ Copy of bills AND receipts of payment <p>Medical bill must have been paid in order to qualify for the special circumstance.</p>

Step 2: Circumstance to be considered (check one):

- Loss of employment
- Separation/Divorce
- Unusual expenses (specify) _____
- Loss of benefits
- Private School Tuition
- Death of a spouse or parent
- Deduction of one-time payment (specify) _____

Step 3: Reason for filing:

In the space below, give specific dates and reasons as to when and why income changes occurred. Be specific and list events in chronological order. Use a separate sheet of paper if necessary.

Projected Adjusted Gross Income			
Projected Untaxed Income			
Estimated Tax Paid			
Parent Information	1/1/23 to present	Present to 12/31/23	TOTAL
Wages			
Unemployment Benefits			
Child Support Received for all children			
Payments to tax-deferred pension and savings plan; paid directly or withheld from earnings.			
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.			
Untaxed portions of IRA distributions			
Housing, food, living allowances paid on your behalf			
Veterans' NON-education benefits			
Untaxed portions of pensions			
Tax exempt interest income			
Other untaxed income such as worker's compensation and SSI, SSD, or short/long term disability			
FINANCIAL AID OFFICE ONLY:			
Projected Adjusted Gross Income			
Projected Untaxed Income			
Estimated Tax Paid			

Submit this worksheet to:

Keystone College
Student Central
Att. Financial Aid
One College Green
LaPlume, PA 18440
Phone: 570-945-8300 FAX: 570-945-8967
Email: financialaid@keystone.edu
Please make a copy for your records.