

Student Name:

2023-2024 Special Circumstance Request Form

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
ircumstances during the calendar or academic year. If you are a Pennsylvania resident, you should also notify PHEAA of your special
ondition 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:

DEPENDENT STUDENTS

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

INDEPENDENT STUDENTS

Student ID Number:

- 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)

<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:

- ✓ 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

LOSS OF BENEFITS - Student/Spouse/Parent has lost some or all benefits. The following documentation is required:

- ✓ Last check stub(s) or printout of benefit(s) received
- ✓ Letter from agency verifying date and amount of benefit(s) lost

<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:

- ✓ 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

<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:

- ✓ 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.

<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.

✓ invoice or statement from the school(s) showing payments made

<u>**DEATH OF A PARENT OR SPOUSE**</u> – Parent/Spouse passed away after the FAFSA was filed. The following documentation is required:

✓ Copy of Death Certificate

<u>UNUSUAL EXPENSES</u> – Student/Spouse/Parent has unusual medical or dental expenses NOT covered by insurance. The following documentation is required:

✓ Copy of bills AND receipts of payment

Medical bill must have been paid in order to qualify for the special circumstance.

Loss of employment	
Separation/Divorce	
Unusual expenses (speci	
Loss of benefits	
Private School Tuition	
Death of a spouse or pare	ent
Deduction of one-time pa	ayment (specify)
	ic dates and reasons as to when and why income changes occurred hronological order. Use a separate sheet of paper if necessary.
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	·
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Step 4: Verification of Household Size and Student Certification

Write in the names of all household members. Also write in the name of the college attended for any household member who will be attending college at least half-time between July 1, 2023, to June 30, 2024, and will be enrolled in a degree or certificate program. If you need more space, attach a separate piece of paper.

Pependent Students: ✓ Include yourself, your parents and ✓ Any dependents that your parents provide more than half of their support from July 1, 2023, to June 30, 2024		de ✓ Include yourself at ✓ Your children, if y support from July ✓ Other dependents continually provide	 Independent Students: ✓ Include yourself and your spouse ✓ Your children, if you provide more than half of their support from July 1, 2023, to June 30, 2024, and ✓ Other dependents if they live with you, and you will continually provide more than half of their support from July 1, 2023, to June 30, 2024 		
Full Name	Age	Relationship to Student	Name of College		
		SELF	Keystone College		
ertify that all the information reported to qualify f	or federal s	tudent aid is complete and correct to my	knowledge If additional documentation is requi		
Il submit those documents in a timely manner, or is cornation, I may be fined, jailed or both.					

STEP 5: Projected Income:

Student Signature

Project the anticipated income for yourself and your spouse, or your parent(s) if you are a dependent student, in the spaces provided.

Parent Signature

Date

Date

Student / Spouse Income	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			
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: <u>financialaid@keystone.edu</u> Please make a copy for your records.