

2024-2025 Special Circumstance Request Form

Student Name:_	Student ID Number:
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This request is used to adjust the income reported on the 2024-2025 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:

DEPENDENT STUDENTS

Current Pay Statement showing YTD income

- ✓ for everyone in the household currently working
- ✓ Statements for all untaxed benefits
- ✓ Signed copy of your 2022 Tax Return
- ✓ Transcript
 Signed copy of your parent's 2022 Tax Return
 Transcript

INDEPENDENT STUDENTS

Current Pay Statement showing YTD income for

- everyone in the household currently working
- Statements for all untaxed benefits
 Signed copy of your 2022 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 2022 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.

PRIVATE ELEMENTARY/HIGH SCHOOL TUITION – 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 (specify))		
Loss of benefits			
Private School Tuition			
Death of a spouse or paren			
Deduction of one-time pay Step 3: Reason for filing:	ment (specify)_		
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Student Signature Date Parent Signature Date

STEP 5: Projected Income: Project the anticipated income for yourself and your spouse, or your parent(s) if

you are a dependent student, in the spaces provided.

Student / Spouse Income	1/1/24 to present	Present to 12/31/24	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	1/1/24 to present	Present to 12/31/24	TOTAL
Parent Information Wages	1/1/24 to present	Present to 12/31/24	TOTAL
	1/1/24 to present	Present to 12/31/24	TOTAL
Wages	1/1/24 to present	Present to 12/31/24	TOTAL
Wages Unemployment Benefits Child Support Received for all children Payments to tax-deferred pension and savings plan; paid directly or withheld from earnings.	1/1/24 to present	Present to 12/31/24	TOTAL
Wages Unemployment Benefits Child Support Received for all children Payments to tax-deferred pension and savings plan; paid	1/1/24 to present	Present to 12/31/24	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,	1/1/24 to present	Present to 12/31/24	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.	1/1/24 to present	Present to 12/31/24	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	1/1/24 to present	Present to 12/31/24	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	1/1/24 to present	Present to 12/31/24	TOTAL
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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.