

2020-2021 Special Conditions Form

Student's Last Name Student's First Name Student's M.I.

Stevenson University I.D. #

Student's Preferred Phone Number (include area code)

Student's Date of Birth

Parent's Name

email address

Parent's Preferred Phone Number (include area code)

The Special Conditions Form is for families who have experienced extenuating circumstances that may not be accurately reflected in the information provided on the FAFSA. If approved, your financial aid eligibility will be determined by calculating either your real income for 2020 or your projected annual income for 2021. Before your request can be considered, a processed 2020-2021 Free Application for Federal Student Aid (FAFSA) **must** be on file with Stevenson University.

If the FAFSA has provided you with an Expected Family Contribution of \$0, you are **NOT ELIGIBLE** for a Special Conditions.

PLEASE BE ADVISED:

- **You are responsible for payment regardless of your request for a Special Conditions.**
- **Appeals do *not* guarantee an increase to the financial aid.**
- **Your institutional aid may not be increased as a result of this appeal process.**

Please provide as much information as possible. Each request is evaluated on a case-by case basis. Because of the individualized nature of these requests, we may need to request additional information. If we do, we will contact you via email.

All communications regarding approval, denial or requests for additional information will be directed to the student's Stevenson University email address.

- ❖ If you had to provide parent data on your FAFSA, complete this form as a **"Dependent"** student.
- ❖ If you were not required to provide any parent data on your FAFSA, then you are an **"Independent"** Student.

REASON FOR YOUR SPECIAL CONDITIONS

Check all the conditions below that describe your situation and **attach the required documentation**.

- Parent or spouse of student died **after filing the 2020-2021 FAFSA**
 - Enter the date of death: _____
 - Attach** a copy of the death certificate
- Parents have separated or a married independent student has separated, **after filing the 2020-2021 FAFSA**.
 - Enter date of marital separation: _____
 - Attach** a copy of the legal separation agreement or official letter from attorney stating when legal proceedings will begin or proof of separate residence.
- Untaxed income received in **2018** has ceased or has been reduced by 20% or more (i.e. child support, disability pay, combat pay, workers compensation or other).
 - Enter date of change: _____
 - Attach** supporting documentation of termination of benefits or date of change. (i.e. court document, Social security Administration letter, dept. of Social Services letter, DD-214)
- Parent, student or student's spouse suffered permanent and total disability after January 1, **2019**.
 - Enter date of disability: _____
 - Attach** a signed letter from a physician stating the extent and duration of disability
 - Attach** documentation of year-to-date income
 - Attach** a Disability Benefit Statement from the Social Security Administration
- Parents of dependent student or an independent student (and spouse, if married) *have a loss of employment of at last 6 months* OR experience a 20% or more reduction in annual income since 2018 because of job loss or reduction in pay/hours.
 - Enter date of termination/resignation or change in pay: _____
 - Attach** a copy of termination notice from employer or letter of resignation
 - Attach** a copy of your last pay stub from all employers showing year-to-date earning
 - Attach** a copy of any most recent pay stubs from all current jobs for parent, student or student's spouse
 - Attach** a copy of benefit statement from Unemployment Administration showing monthly benefit or denial of benefits
 - Attach** a copy of retirement distribution or statement

REQUIRED DOCUMENTS

1. Explanation of Your Circumstances (to be complete by the parent or independent student):
On a separate piece of paper, please provide specific details about the changes in your financial situation since 2018. Include a timeline of any income changes and relevant employer names.

2. Tax Information

Dependent Students:

- Parent **2018 Tax Return Transcript** (request at www.irs.gov or by calling 1-800-908-9946)
- Parent **2018 W-2s (or 1099)** for all 2018 employers
- Parent **2019 Tax Return Transcript** (request at www.irs.gov or by calling 1-800-908-9946)
- Parent **2019 W-2s (or 1099)** for all 2018 employers
- Student **2018 IRS Federal Tax Return Transcript** (request at www.irs.gov or by calling 1-800-908-9946)
- Student **2018 W-2 (or 1099)** for all 2018 employers
- If student did not file taxes for 2018, you will need to submit the 2020-21 Dependent Student Non-Tax Filer Statement (on SU website)

Independent Students:

- Student (and spouse, if married) **2018 Tax Return Transcript** (request at www.irs.gov or by calling 1-800-908-9946)
- Student (and spouse) **2018 W-2s (or 1099)** for all 2018 employers
- Student (and spouse, if married) **2018 Tax Return Transcript** (request at www.irs.gov or by calling 1-800-908-9946)
- Student (and spouse) **2018 W-2s (or 1099)** for all 2018 employers
- If student or spouse did not file taxes for 2018, you will need to submit the 2020-21 Independent Student Non-Tax Filer Statement (on SU website)
- IRS Verification of Non-Filing Letter (attached to SU Non-Tax Filer Statement)

3. Estimated 2020 Income Worksheet (Attached)

4. 2020-21 Student Household Worksheet (on SU website)

Dependent

OR

Independent

ESTIMATED 2020 INCOME WORKSHEET

2020 Estimated Taxable Income			
	Dependent Students	FATHER/STEP-FATHER	MOTHER/STEP-MOTHER
	Independent Students	STUDENT	SPOUSE
1. Wages, salaries, tips (include severance pay)		\$	\$
2. Pensions and annuities		\$	\$
3. Interest and dividends and capital gains		\$	\$
4. Business or farm income		\$	\$
5. Social Security benefits (taxable)		\$	\$
6. Income received from rents after expenses (mortgage interest, taxes and insurance)		\$	\$
7. Alimony		\$	\$
8. Unemployment compensation		\$	\$
9. Any other taxed income			
Total 2020 Estimated Taxed income		\$	\$

2020 Estimated Untaxable Income			
	Dependent Students	FATHER/STEP-FATHER	MOTHER/STEP-MOTHER
	Independent Students	STUDENT	SPOUSE
1. Payment to tax deferred pension and savings plans (paid direct or withheld from earnings). Including, but not limited to, amounts reported on W-2 forms in boxes 12a through 12d codes D, E,F, G, H and S.		\$	\$
2. Deductible IRA and/or Keogh, SEP, and SIMPLE payments		\$	\$
3. Child Support received for all children		\$	\$
4. Tax exempt interest income		\$	\$
5. Untaxed portions of pensions		\$	\$
6. Untaxed portions of IRS distributions.		\$	\$
7. Living and housing allowances for clergy, military and others <ul style="list-style-type: none"> • Include cash payments or cash value of benefits • Exclude rent subsidies for low income housing. • Members of military should only report their total Basic Allowance for Subsistence benefit's for 2017. Do not report any military housing benefits. 		\$	\$
8. Veteran's Non-educational benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances			
9. Any other untaxed income and benefits such as Workers Compensation, disability, etc.			
10. Cash support or money paid on behalf of the student or the family			
11. Cash or any money paid on your behalf, not reported elsewhere on this form.			
Total 2020 Estimated Taxed income			

CERTIFICATION

BEFORE SUBMITTING, PLEASE CERTIFY THAT THE REQUIRED DOCUMENTS ARE INCLUDED:

- This completed form
- All required tax documents
- Explanation of Circumstances
- Additional documents as described in this form.

Certifications and Signatures:

By signing this form, I certify that I understand the following

- ✓ The decision of this Special Conditions process is final; there is no appeal process to the Department of Education.
- ✓ All of the information on this form is true and complete to the best of my knowledge.
- ✓ If requested, I agree to provide further documentation to substantiate this request for Special Conditions.
- ✓ All Special Conditions are reviewed on a case-by-case basis and this written request does not guarantee approval and may not ultimately result in actual increase of the financial aid.
- ✓ All required documents must be submitted prior to reviewing my request for Special Conditions.
- ✓ Due to the complexity of Special Conditions Appeals, please allow 3-4 weeks for processing once our office has received all required documentation.

Student's Signature (required)

Date

Parent's Signature (required if student is dependent)

Date

OFFICE USE ONLY

Student Changes

AGI _____

Taxes Paid _____

Income _____

Untaxed _____

W-2 _____

in HH _____

Other _____

Other _____

Parent Changes

AGI _____

Taxes Paid _____

M's Income _____

F's Income _____

Untaxed _____

W-2 _____

in HH _____

Other _____