

## 2023-2024 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 2022 or your projected annual income for 2023. Before your request can be considered, a processed 2023-2024 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.**
- **Special Conditions do *not* guarantee an increase to the financial aid.**
- **Your institutional aid may not be increased as a result of this appeal process.**
- **The decision of this Special Conditions process is final; there is no appeal process to the Department of Education**

Please provide all of the requested documentation. 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.

**I certify**, that 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

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent's Signature (required if student is dependent)

\_\_\_\_\_  
 Date

## REASON FOR YOUR SPECIAL CONDITIONS

Check all the conditions below that describe your situation and **attach the required documentation**. Please note that the reason for a Special Conditions is not limited to those listed below. Please contact us directly if you have questions regarding a circumstance that is not listed below.

### 1. Death of a Parent or Spouse.

- Parent or spouse of student died **after filing the 2023-2024 FAFSA**.
- Attach** a copy of the death certificate.

### 2. Separation of a Parent or Spouse.

- Parents have separated or a married independent student has separated, **after filing the 2023-2024 FAFSA**.
- Attach** a copy of the legal separation agreement and/or official letter from attorney stating when legal proceedings will begin or proof of separate residence.

### 3. Loss of Untaxed Income.

- Untaxed income received in **2021** has ceased or has been reduced by 20% or more (i.e. child support, disability pay, combat pay, workers compensation or other).
- Attach** supporting documentation of termination of benefits or date of change. (i.e. court document, Social security Administration letter, Department of Social Services letter, DD-214).

### 4. Permanent and Total Disability.

- Parent, student or student's spouse suffered permanent and total disability after January 1, **2022**.
- 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.

### 5. Reduction of Income.

- 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 2021 because of job loss or reduction in pay/hours.
- 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 earnings.
- 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

- 6. Explanation of Your Circumstances (to be complete by the parent or independent student):**  
On a typed and signed letter, please provide specific details about the changes in your financial situation since 2021. Include a timeline of any income changes and relevant employer names.

### 7. Tax Information

#### Dependent Students:

##### 2021 Information

- Parent **2021 Tax Return Transcript** (request at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946)
- Parent **2021 W-2s (or 1099)** for all 2021 employers.
- Student **2021 IRS Federal Tax Return Transcript** (request at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946).
- Student **2021 W-2 (or 1099)** for all 2021 employers.
- If student did not file taxes for 2021, you will need to submit the 2023-24 Dependent Student Non-Tax Filer Statement (on SU website).

##### 2022 Information

- Parent **2022 Tax Return Transcript** (request at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946).
- Parent **2022 W-2s (or 1099)** for all 2022 employers.
- Student **2022 Tax Return Transcript** (request at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946).
- Student **2022 W-2s (or 1099)** for all 2022 employers.

#### Independent Students:

##### 2021 Information

- Student (and spouse, if married) **2021 Tax Return Transcript** (request at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946).
- Student (and spouse) **2021 W-2s (or 1099)** for all 2021 employers.
- If student or spouse did not file taxes for 2020, you will need to submit the 2023-24 Independent Student Non-Tax Filer Statement (on SU website).
- IRS Verification of Non-Filing Letter (attached to SU Non-Tax Filer Statement).

##### 2022 Information

Student (and spouse, if married) **2022 Tax Return Transcript** (request at [www.irs.gov](http://www.irs.gov) or by calling 1-800-908-9946).

Student (and spouse) **2021 W-2s (or 1099)** for all 2022 employers.

- 8. 2023-24 Student Household Worksheet (on SU website).**

Dependent

OR

Independent