

University of Charleston 2022-2023 Special Circumstance Form

Student Name: _____ Student SSN/ID #: _____

If you or your family have/has experienced a loss in income or unusually high medical expenses, University of Charleston may be able to adjust your Expected Family Contribution (EFC). In order to take the special circumstance into consideration, you must file a 2022-2023 Free Application for Federal Student Aid (FAFSA), complete the applicable sections below and include all necessary documentation.

Part I – Household Information

Dependent Students – list the people in your parents’ household including:

- Yourself
- Parent(s) (including stepparent) even if you don’t live with them
- Your parent(s)’ other children, even if they do not live with your parent(s), if your parent(s) will provide more than half of their support from July 1, 2022 through June 30, 2023 or if the children would be required to give parental information on the FAFSA
- Any other people if they will live with your parent(s) and will receive more than half of their financial support from them from July 1, 2022 through June 30, 2023.

Independent Students – list the people in your household including:

- Yourself and your spouse, if married
- Your children/stepchildren if you will provide more than half of their support from July 1, 2022 through June 30, 2023 or if the children would be required to provide your information if they were completing a 2022-2023 FAFSA.
- Any other people if they will live with you and will receive more than half of their financial support from you from July 1, 2022 through June 30, 2023.

| | Full name | Relationship | Age | Will be enrolled in college at least half time (yes or no) | College |
|----|-----------|--------------|-------|--|---------|
| 1. | _____ | _____ | _____ | _____ | _____ |
| 2. | _____ | _____ | _____ | _____ | _____ |
| 3. | _____ | _____ | _____ | _____ | _____ |
| 4. | _____ | _____ | _____ | _____ | _____ |
| 5. | _____ | _____ | _____ | _____ | _____ |
| 6. | _____ | _____ | _____ | _____ | _____ |
| 7. | _____ | _____ | _____ | _____ | _____ |

Part II – Adjustment type

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

1. Death of parent or spouse

- Enter the date of death: _____
- Attach a copy of the death certificate

2. Separation or divorce of parent or student

- Enter the date of separation/divorce: _____
- If separated, please attach documentation showing individuals live at separate addresses.
- Attach a copy of legal separation/divorce or official letter from attorney stating when legal proceedings will begin.

3. Reduction of untaxed income (i.e. child support ended)

- Enter the date of change: _____
- Attach supporting documentation of lost untaxed income (i.e. court order of child support change).

4. Permanent and total disability

- Enter the 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.

5. Loss or reduction of income

- Will your total annual household income be lowest for 2021 or 2022? ___ 2021 ___ 2022
- Required documentation for 2021:
 - Verification of severance amount received in 2020 (if applicable)
- Required documentation for 2022:
 - Employer letter/document stating when your employment ended or changed
 - Verification of severance amount received in 2021 (if applicable)
 - Unemployment Benefits Statement (if applicable)
 - Final paystub from prior job with details about your current and year-to-date earnings (if applicable)
 - Most recent paystubs from all current jobs for student and parent(s) or spouse
 - Complete Part III – Estimated 2022 Income on page 4

6. Unusually high medical expenses during 2020, 2021 or 2022

- Which year were they highest? ___ 2020 ___ 2021 ___ 2022
- Attach a copy of your IRS Schedule A for year selected above.
- Attach verification of payments made toward medical expenses for year selected above.

Part III – Estimated 2021 Income

If your total 2022 income will be lower than your 2021 income, you must complete this section.

- Complete both tables. Report all your income before exemptions, adjustments and deductions.
- Include all income/benefits that you and/or your parent(s)/spouse expect to receive from January 1, 2022 through December 31, 2022.
- **Complete all items. If an item does not apply, you must enter “0”.**

| 2022 Estimated Gross Taxable Income | Dependent Students | Parent | Parent/Stepparent |
|--|----------------------|---------|-------------------|
| | Independent Students | Student | Spouse |
| 1. Wages, salaries, tips (including severance pay) | | \$ | \$ |
| 2. Pensions and annuities | | \$ | \$ |
| 3. Interest, 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 ins.) | | \$ | \$ |
| 7. Alimony | | \$ | \$ |
| 8. Unemployment compensation | | \$ | \$ |
| 9. Any other taxed income | | \$ | \$ |
| Total 2021 Estimated Taxed Income (1-9) | | \$ | \$ |

| 2022 Estimated Untaxed Income | Dependent Students | Parent | Parent/Stepparent |
|---|----------------------|---------|-------------------|
| | Independent Students | Student | Spouse |
| 1. Payment to tax deferred pension and savings plan (paid directly or withheld from earnings). Including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. | | \$ | \$ |
| 2. IRA deductions and payments to self-employed SEP, SIMPLE and Keogh | | \$ | \$ |
| 3. Child support received for all children. | | \$ | \$ |
| 4. Tax exempt interest income. | | \$ | \$ |
| 5. Untaxed portions of IRA distributions. | | \$ | \$ |
| 6. Untaxed portions of pensions. | | \$ | \$ |
| 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 the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2022. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. | | \$ | \$ |
| 8. Veteran’s non-education benefits such as Disability, Death Pension, or Dependency & 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 family, not reported elsewhere on this form. List type(s): _____ | | \$ | \$ |
| Total 2022 Estimated Untaxed Income (1-10) | | \$ | \$ |

Part IV – Required Documentation

In addition to the information requested in Part II, you must also attach all the documentation listed below. Forms without all documentation will not be reviewed.

All Students:

- Student’s 2020 and 2021 IRS Tax Transcript or 2020 and 2021 signed copies of Federal Tax Returns
- Student’s 2020 and 2021 W-2 form(s) for all 2020 and 2021 employers
- All required documentation from Part II

Dependent students must also submit:

- Parent(s)’ 2020 and 2021 IRS Tax Transcript(s) or 2020 and 2021 signed copies of Federal Tax Returns
- Parent(s)’ 2020 and 2021 W-2 form(s) for all 2020 and 2021 employers

Married students must also submit:

- Spouse’s 2020 and 2021 IRS Tax Transcript or 2020 and 2021 signed copies of Federal Tax Returns

Part V – Certification

- I understand that I must submit this form after January 1, 2022.
- I certify that the information on this form is true and correct to the best of my knowledge and belief.
- I understand that if I underestimate my income, I may have to repay any aid that I receive based on that data.

Student Signature

Date

Parent Signature (dependent student)

Date

Parent’s name (please print)

Parent contact information

Please submit to the Financial Aid Office one of the following ways:

Email: ucfinancialaid@ucwv.edu

Fax: 304-352-0011

Mail: University of Charleston
Financial Aid Office
2300 MacCorkle Avenue, SE
Charleston, WV 25304