



**2022-2023 Special Circumstance Request
Household Income Loss or Reduction**

West Virginia State University realizes families may experience unforeseen circumstances and/or expenses during an academic year. Use this form to address these unusual circumstances or expenses.

Student Name: _____ Student ID#: _____

Email Address: _____ Telephone Number: _____

On a case-by-case basis, a financial aid adviser may review family changes after the FAFSA has been submitted. If a major change occurs in your financial situation, you may submit a request for our office to review your situation.

Your request will only be considered if you are able to demonstrate **a minimum of a 30% reduction** in household income. Please contact the Office of Student Financial Aid if you are unsure if you meet this qualification.

SECTION A:

Individual(s) with circumstance(s), check as appropriate:

____ Father/Stepfather ____ Mother/Stepmother ____ Student ____ Spouse

<p>____ Loss of Employment or Funding</p> <ul style="list-style-type: none"> • Recent Unemployment • Unemployment Benefits End • Social Security Benefits End • Child Support Payments End • Other 	<p>Required Information:</p> <ol style="list-style-type: none"> 1. Letter of explanation of circumstances from student/parent 2. Last date of pay / / 3. Completed Section B and C on the reverse side of this form 4. Signed 2020 Federal Tax Return Transcript from the IRS 5. Copy of last paycheck stub, or statement with year-to-date earnings
<p>____ Reduction or Loss of Income</p> <ul style="list-style-type: none"> • Change of Employer • Change to income or assets • Non-Reoccurring Income 	<p>Required Information:</p> <ol style="list-style-type: none"> 1. Letter of explanation of circumstances from student/parent 2. Last date of receipt of benefit/income / / 3. Completed Section B and C on the reverse side of this form 4. Signed 2020 Federal Tax Return Transcript from the IRS 5. Copy of last paycheck stub, with year-to-date earnings
<p>____ Change in Household Size</p> <ul style="list-style-type: none"> • Separation • Divorce • Death of Wage Earner 	<p>Required Information:</p> <ol style="list-style-type: none"> 1. Letter of explanation of circumstances from student/parent 2. Date of separation/divorce/Death / / 3. Completed Section B and C on the reserve side of this form 4. Signed 2020 Federal Tax Return Transcript from the IRS 5. Completed 2022-2023 Verification Worksheet 6. Divorce Decree, Legal Separation Agreement, or Death Certificate

SECTION B:

INSTRUCTIONS: Complete using ALL expected income from January 1, 2022 to December 31, 2023 of the person(s) with the special circumstance(s). You must submit documentation of ALL expected income. If filing this form for separation or death of a parent, use only your custodial parent's income.

2022 Taxed Income	Father	Mother	Student	Spouse
Income Earned from Work	\$	\$	\$	\$
Unemployment Benefits	\$	\$	\$	\$
Business or Farm Income	\$	\$	\$	\$
Pensions & Annuities	\$	\$	\$	\$
Taxed Interest/Dividend Income	\$	\$	\$	\$
Taxed Social Security Benefits	\$	\$	\$	\$
Other Taxed Income (pensions, alimony, rentals, etc.)	\$	\$	\$	\$
Total 2022 Taxed Income	\$	\$	\$	\$

2022 Untaxed Income	Father	Mother	Student	Spouse
Child Support Received	\$	\$	\$	\$
Untaxed Social Security Benefits	\$	\$	\$	\$
Workers Compensation	\$	\$	\$	\$
Welfare Benefits/TANF	\$	\$	\$	\$
Untaxed Portions of Pensions	\$	\$	\$	\$
Veterans Non-Education Benefits	\$	\$	\$	\$
Tax-Deferred Pension Payments	\$	\$	\$	\$
Deductible IRA/Keogh Payments	\$	\$	\$	\$
Tax Exempt Interest Income	\$	\$	\$	\$
Foreign Income Exclusions	\$	\$	\$	\$
Living Allowance for Clergy/Members of the Military	\$	\$	\$	\$
Any Other Untaxed Income	\$	\$	\$	\$
Total 2022 Untaxed Income	\$	\$	\$	\$

SECTION C:

Current Expenditures:

1. What is the monthly cost of housing (rent, mortgage)? _____
From what income source is this paid? _____
If your household did not have this expense, explain why _____
Independent Students: Is your name on the lease or mortgage? Yes No
2. What is the monthly cost of utilities (electric, gas, water, phone, cable)? _____
From what income source is this paid? _____
If your household did not have this expense, explain why _____
Independent Students: Are the utilities in your name? Yes No
3. What is the monthly cost of food? _____
From what income source is this paid? _____
If your household did not have this expense, explain why _____
4. What is the monthly cost of car payments/insurance and transportation costs? _____
From what income source is this paid? _____
If your household did not have this expense, explain why _____
5. What is the monthly cost of clothing, personal needs, and misc.? _____
From what income source is this paid? _____
6. What is the monthly cost of medical expenses and/or health insurance? _____
From what income source is this paid? _____

Resources:

7. List any child support or income received during the past year and the source of that income:
Child Support Received: \$ _____ from _____
\$ _____ from _____

Income Received: \$ _____ from _____
\$ _____ from _____
8. List any cash support you (student) received or money that was paid on your behalf during the past year and the source of that income:
\$ _____ from _____
\$ _____ from _____

By signing, I agree that the information provided is true and complete to the best of my knowledge. If requested, I agree to provide additional documentation. I further agree to notify the Office of Student Financial Aid and Scholarships at West Virginia State University of any error or omission in the above information, or of any further circumstances which affect the accuracy of the provided information. I understand failure to comply with this agreement could result in forfeiture of financial aid eligibility of the student.

Student's Signature

Date

Parent/Student's Spouse's Signature

Date