

2023-2024 Special Circumstances Review

Student Name: _____ Capital ID/SSN: _____

When completing the FAFSA, you are required to provide prior-prior year income/asset information and in some cases, this information changes or is not a good representation of your family's financial situation. If you are experiencing a hardship or other situation that is not reflected on the FAFSA, we may be able to reevaluate your financial need. Please note that not all circumstance reviews will result in additional financial aid.

Instructions:

Please check the box next to each step as you complete it. If you are a dependent student, as defined on the 2023-2024 FAFSA, complete all requested information about you and your parent(s). If you are considered independent per the 2023-24 FAFSA, please submit information about yourself and your spouse, if applicable.

Step 1
 Have you filed your FAFSA for 2023-24? Yes _____ No _____
 Special Circumstance Reviews cannot be completed until we have received a valid FAFSA

Step 2
 Submit a detailed explanation of your circumstances. This statement must be *signed and dated* by you and your parent, if you are a dependent.

Step 3
 If your circumstances relate to a loss of income, please estimate all income received from July 1, 2022 through June 30, 2023

	Student (& Spouse)	Parent(s) of dependents	
Taxable Income	Income from work	\$ _____	\$ _____
	Unemployment	\$ _____	\$ _____
	Interest Income	\$ _____	\$ _____
	Alimony	\$ _____	\$ _____
	Other taxable income	\$ _____	\$ _____
	Type: _____		
Untaxed Income	Social Security benefits	\$ _____	\$ _____
	Payments to tax deferred pensions	\$ _____	\$ _____
	IRA deductions	\$ _____	\$ _____
	Child Support	\$ _____	\$ _____
	Untaxed distributions from any IRAs or pensions	\$ _____	\$ _____
	Welfare benefits (do not include SNAP benefits)	\$ _____	\$ _____
	Workman's Compensation	\$ _____	\$ _____
	Other untaxed income	\$ _____	\$ _____
Type: _____			
Total	\$ _____	\$ _____	

Step 4

Verification must be completed prior to processing any special circumstance review. Submit copies of the following required documents:

1. Copies of all 2021 Federal tax return transcripts (Student and parent)
 - Will be waived if you used the IRS Data Retrieval Tool on the FAFSA
 - Obtain a copy of your transcript at www.irs.gov/Get-Transcript
 - Check if you have already submitted it: student _____ parent _____
2. Copies of all student and parent (or student and spouse) W-2 forms from 2021
 - Check if you have already submitted it: student _____ parent _____
3. Capital University Verification Worksheet
 - Check if you have already submitted it _____

Step 5

Check all situations that apply and refer to the list of required documents that must be submitted. These must be included with this form and your detailed letter of explanation in order for us to complete our review.

_____ **Unemployment/loss of income/retirement**

- Documentation supporting actual/projected income from July 1, 2022 through June 30, 2023
- Last pay stub(s) from previous employer indicating year to date earnings
- Letter from prior employer or other proof of date of termination
- If applicable, signed copy of filed 2022 tax return (1040 with schedules 1, 2, 3)
- If applicable, copy of unemployment benefits letter
- If applicable, documentation to support anticipated earnings
- If applicable, court documentation to show loss of child support or alimony

_____ **Divorce/separation/death of parent since FAFSA was filed**

- Copy of divorce decree or letter from attorney stating marital status --or--
- Copy of death certificate to verify date of death

_____ **Unusual medical or dental expenses**

- Itemized statements from medical providers showing the name of the patient, date(s) of treatment, charges and patient payment --or--
- Schedule A from either the 2021 &/or 2022 Federal income tax return if expenses were itemized
- Be sure to include the total amount of expenses incurred that were not covered by insurance in your letter of explanation

_____ **Tuition expenses paid for sibling at private elementary or high school**

- Letter or invoice from the school documenting the amount paid by the family in 2022-23
- Include in letter of explanation the amount you anticipate paying for the 2023-24 year and for whom

_____ **Non-repeating income reported on the FAFSA**

- Letter of explanation must include the source of the one-time (non-repeating) income and how those funds were spent

_____ **Other:** _____

- Sufficient documentation must be submitted to substantiate the information provided in the letter of explanation

Step 6

Read and sign below

I attest that the information provided on this form and all supporting documentation is true to the best of my knowledge. I understand that incomplete requests will not be reviewed and that submitting this information does not guarantee an adjustment to my/my child's financial aid.

Student Signature

Date

Parent Signature

Date

Student e-mail address

Parent e-mail address

Step 7

Submit all documentation to:

**Capital University, Financial Aid Office: Yochum Hall First Floor
1 College and Main, Columbus, OH 43209
Phone: 614-236-6511 Fax: 614-236-6926**