

# Marywood University

## 2023-2024 Special Circumstance Request Form

**Student Name:** \_\_\_\_\_ **Student ID:** \_\_\_\_\_

*This request is used to adjust the income reported on the 2023-2024 Free Application for Federal Student Aid (FAFSA) due to a change of circumstances during the calendar or academic year. If you are a Pennsylvania resident, you should also notify PHEAA of your special condition by calling 1-800-692-7392. Please note: Only one Special Circumstance Request Form will be accepted per award year.*

**Step 1: Unless otherwise directed, students must submit the following documentation:**

### DEPENDENT STUDENTS

- ✓ Parent's current pay statement showing 2023 YTD income.
- ✓ Student's current pay statement only if it is relevant to the special circumstance reported.
- ✓ Statements for all untaxed benefits received in 2021 and/or 2022
- ✓ Student 2021 Federal Income Tax Return or Tax Return Transcript (DRT users exempt)
- ✓ Your parent's 2021 Federal Income Tax Return or Tax Return Transcript (DRT users exempt)
- ✓ Student 2022 Federal Income Tax Return or Tax Return Transcript
- ✓ Your parent's 2022 Federal Income Tax Return or Tax Return Transcript

### INDEPENDENT STUDENTS

- ✓ Current Pay Statement showing 2023 YTD income for everyone in the household currently working
- ✓ Statements for all untaxed benefits received in 2021 and/or 2022
- ✓ Student 2021 Federal Income Tax Return or Tax Return Transcript (DRT users exempt)
- ✓ Spouse 2021 Federal Income Tax Return or Tax Return Transcript (if filed separately)
- ✓ Student 2022 Federal Income Tax Return or Tax Return Transcript (DRT users exempt)
- ✓ Your spouse 2022 Federal Income Tax Return or Tax Return Transcript (if filed separately)

**Review the following information for your circumstance and the required documentation.**  
*(Incomplete forms will not be processed)*

**REDUCED INCOME OR LOSS OF EMPLOYMENT** – Student/Spouse/Parent income is lower in 2022 than 2021 or was working during 2022, but is now working fewer hours or is unemployed in 2023. The following documentation is required from the unemployed household member:

- ✓ Last check stub(s) from previous employer showing year to date (YTD) income
- ✓ Letter from previous employer stating the date of separation or termination
- ✓ Unemployment benefit or denial letter

**LOSS OF BENEFITS** – Student/Spouse/Parent has lost some or all benefits. The following documentation is required:

- ✓ Last check stub(s) or printout of benefit(s) received
- ✓ Letter from agency verifying date and amount of benefit(s) lost

**DEDUCTION OF ONE-TIME PAYMENT** – Student/Spouse/Parent received a one-time lump sum payment such as pension, IRA, annuities, gambling winnings, settlement, etc. The following documentation is required:

- ✓ Explanation as to why the one-time payment is not available to be used for education related expenses
- ✓ Receipt(s) showing where one-time payment was spent

**SEPARATION OR DIVORCE** – Student/Parent was married when the FAFSA was filed, but has now separated or divorced. The following documentation is required:

- ✓ Court documentation verifying legal separation or divorce
- ✓ In the case of separation, please provide a MINIMUM of two (2) utility bills from each parent that clearly shows name and street address. Examples of acceptable utility bills would be cable/internet, electric, gas, garbage, water, and sewer.

**DEATH OF A PARENT OR SPOUSE** – Parent/Spouse passed away after the FAFSA was filed. The following documentation is required:

- ✓ Copy of Death Certificate

Step 2: Please check why you are filing this form (check one):

- ☐ Loss of employment
- ☐ Reduced Income
- ☐ Separation or Divorce
- ☐ Loss of benefits
- ☐ Death of a spouse or parent
- ☐ Deduction of one-time payment

Step 3: Additional Information (DO NOT LEAVE THIS BLANK):

In the space below, give specific dates and reasons as to when and why income changes occurred. Be specific and list events in chronological order. Use a separate sheet of paper if necessary.

Step 4: Verification of Household Size and Student Certification:

Write in the names of all household members. Also, write in the name of the college attended for any household member who will be attending college at least half-time between July 1, 2023 and June 30, 2024 and will be enrolled in a degree or certificate program. If you need more space, attach a separate piece of paper.

<b>Dependent Students:</b> <ul style="list-style-type: none"><li>✓ Include yourself, your parents and</li><li>✓ Any dependents that your parents provide more than half of their support from July 1, 2023 to June 30, 2024</li></ul>		<b>Independent Students:</b> <ul style="list-style-type: none"><li>✓ Include yourself and your spouse</li><li>✓ Your children, if you provide more than half of their support from July 1, 2023 to June 30, 2024 and</li><li>✓ Other dependents if they live with you, and you will continually provide more than half of their support from July 1, 2023 to June 30, 2024</li></ul>	
Full Name	Age	Relationship to Student	Name of College
		SELF	Marywood University

Step 5: Projected Income:

Project the anticipated income for yourself and your spouse, or your parent(s) if you are a dependent student, in the spaces provided. *If you are the dependent student and your income is not relevant to the circumstance for which this form is filed, you may leave the Student Income section blank.*

Student / Spouse Income	1/1/23 to present	Present to 12/31/23	TOTAL
Wages			
Unemployment Benefits			
Child Support Received for <b>all children</b>			
Payments to tax-deferred pension and savings plan; paid directly or withheld from earnings.			
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.			
Untaxed portions of IRA distributions			
Veterans <b>NON-education</b> benefits			
Untaxed portions of pensions			
Tax exempt interest income			
Other untaxed income such as worker’s compensation and SSI, SSD, short/long term disability, or living and housing paid on your behalf.			

Parent Information	1/1/23 to present	Present to 12/31/23	TOTAL
Wages			
Unemployment Benefits			
Child Support Received for <b>all children</b>			
Payments to tax-deferred pension and savings plan; paid directly or withheld from earnings.			
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.			
Untaxed portions of IRA distributions			
Veterans <b>NON-education</b> benefits			
Untaxed portions of pensions			
Tax exempt interest income			
Other untaxed income such as worker’s compensation and SSI, SSD, short/long term disability, or living and housing allowances paid on your behalf			

*I certify that all the information reported to qualify for federal student aid is complete and correct to my knowledge. If additional documentation is required, I will submit those documents in a timely manner or my Special Circumstance Request will be denied. I also understand that if I give false or misleading information, I may be fined, jailed, or both.*

*Student Signature* \_\_\_\_\_ *Date* \_\_\_\_\_

*Parent/Spouse Signature* \_\_\_\_\_ *Date* \_\_\_\_\_

*RETURN ALL PAGES AND SUPPORTING DOCUMENTATION TO:*

*Marywood University  
Office of Financial Aid  
2300 Adams Avenue  
Scranton, PA 18509-1598*

*Or fax to:  
570-961-4589*

*Per government regulations, please do not email this form or the  
supporting documentation!*