

2018-2019 Special Circumstance Petition

_____	_____	_____
Last Name	First Name	CSU ID #
_____	(____)_____	(____)_____
Email Address	Phone Number (Home)	Phone Number (Cell)

*****It is strongly recommended that you meet with a Student Services Specialist in Campus 411 All-in-1 to review your circumstances and supporting documentation.*****

This petition should only be completed by an independent student/spouse or parent(s) of a dependent student.

The following documents are required to be submitted with this form to our office before your petition will be reviewed. Do not submit your petition until you have all required documents.

Checklist:

- Detailed explanation of your situation – include dates when applicable
- The appropriate 2018-2019 Verification Worksheet (www.csuohio.edu/financial-aid/financial-aid-forms).
- 2016 IRS Tax Return Transcript(s) for Student and Spouse (if married) or Student and Parent(s) (if dependent), **this must be submitted even if the IRS Data Retrieval Tool was used.**
- All 2016 W-2s issued to Student, Spouse (if married), and Parent(s) (if dependent).
- All additional required documentation listed for your circumstance.

Additional information or documentation may be requested by the Financial Aid Office.

- One-time Income Payment: You or your parent/spouse received a one-time income payment in 2016
(May include pension or IRA distribution, inheritance, or bonus).

Additional required documentation:

- 1) Documentation of one-time payment
 - 2) Explanation of why one-time payment is not available for educational purposes
- *Consumer debt cannot be considered when determining a family's ability to contribute to a student's education**

- Loss of Untaxed/Taxable income: Alimony, Workers Compensation, Unemployment, or other.

List Benefit OR Untaxable/Taxable source: _____

Date of Benefit or Income Loss: _____ Amount received for 2016 \$ _____

Additional required documentation:

- Record of amount received from 1/1/2016 to present**
- Termination letter from provider/agency**

- Separation/Divorce:

Additional required documentation:

- 1) Separation or divorce papers
- 2) All 2016 W-2s for both parties

- Death (parent or spouse)

Name of Deceased: _____

Relationship to student: _____

Additional required documentation:

- 1) Copy of the death certificate
- 2) All 2016 W-2s for both parties on a Joint 2016 Federal Tax Return

Student's Name _____

CSU ID Number _____

Medical /Dental Expenses: *Out of pocket expenses in 2016 exceeded 10% of the adjusted gross income.*

Additional required documentation:

1) Copy of Schedule A from 2016 Federal Tax Return

Loss of Employment *Must be out of work at least 10 weeks before appeal will be considered*

(check one) __Mother __Father __Student __ Spouse (For independent student/spouse or parent of dependent student).

Date of Loss: _____

Additional required documentation:

If loss occurred during 2017

1) All 2017 W-2(s) issued to Parent(s)

2) 2017 IRS Tax Return Transcript – Parent(s)

If loss occurred during 2018

1) A letter on letterhead from previous employer indicating last day worked

2) Last paystub showing year to date earnings or letter from employer indicating year to date earnings

3) Unemployment Benefits Determination Statement and payment summary

Other: Attach a brief statement and supporting documentation.

Certification and Signatures

I affirm that the data contained on this form and submitted with this form is true and complete to the best of my knowledge. Upon request, I will provide additional documentation to substantiate the information provided. If this Special Circumstance Petition involves a reduction of my earned income, I understand I may be required to provide documentation from the Internal Revenue Service of the actual income for the impacted tax year.

Student's Signature

Date

Parent's Signature (If Dependent Student)

Date

For Office Use Only

Old EFC: _____

New father income: _____

New EFC: _____

New mother income: _____

New AGI: _____

New additional Information: _____

New Taxes Paid: _____

New untaxed income: _____

New student income: _____

Current ISIR Trans #: _____

New spouse income: _____

New ISIR Trans #: _____

APPROVED

DENIED

WAIVED

NOT NEEDED

Notes:

FAO Staff: _____

Date: _____