

2026-2027 Special Circumstance Petition

_____	_____	_____
Last Name	First Name	CSU ID #

*****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. Students need to have verification completed, and be awarded before consideration. **2026-2027 petitions will be considered after May 1st, 2026.**

The following documents must be submitted with this form 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 2026-2027 Verification Worksheet (www.csuohio.edu/financial-aid/financial-aid-forms).
- 2024 signed copy of your 1040 (Include Schedules 1, 2, 3, C, and K-1 if applicable), or IRS Tax Return Transcript(s) for Student and Spouse (if married) or Student and Parent(s) (if dependent), and a copy of All 2024 W-2s issued to Student, Spouse (if married), and Parent(s) (if dependent). This is NOT required if the IRS Direct Data Exchange (DDX) was used successfully on the 2026-2027 FAFSA.
- All additional required documentation listed for your circumstance.

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

*If this petition is filed after December 31, 2026 you **MUST** submit your 2026 Federal Tax Return and W2s*

- One-time Income Payment: You or your parent/spouse received a one-time income payment in 2023 (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 2024 \$ _____

Additional required documentation:

- Record of amount received from 1/1/2024 to present**
- Termination letter from provider/agency**

- Separation/Divorce:

Additional required documentation:

- 1) Separation or divorce documentation**
- 2) All 2024 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 2024 W-2s for both parties and a Joint 2024 signed copy of 1040, or Federal Tax Return Transcript**

Medical /Dental Expenses: *Out of pocket expenses in 2024 exceeded 10% of the adjusted gross income.*

Additional required documentation:

1) Copy of Schedule A from 2024 Federal Tax Return

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

(check one) __Parent-1 __Parent-2 __Student __ Spouse (For independent student/spouse or parent of dependent student). Date of Loss: _____

Additional required documentation:

Update income to 2025:

- 1) All 2025 W-2(s) issued**
- 2) 2025 signed copy of your 1040 (Include Schedules 1, 2, 3, C, or K-1 if applicable), or IRS Tax Return Transcript**

Update income to 2026: *If this petition is filed after December 31, 2026 you MUST submit your 2026 Federal Tax Return and W2s.*

- 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.

Note: This form must be signed with a hand written signature. Typed names or electronic signatures are not acceptable and will delay processing

*Student's Signature

Date

*Parent's Signature (If Dependent Student)

Date

For Office Use Only

Old SAI: _____

Parent income: _____

New SAI: _____

Parent's Spouse 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: _____