2023-2024
Special Circumstances Form

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SPEC04

Black Ink Only

The Special Circumstances form is for students who have exceptional circumstances which are not taken into account through the initial FAFSA process. Complete this form indicating your circumstances and submit it to the Office of Financial Assistance with the required documentation for us to evaluate your need for additional assistance. Review of special circumstances will take place after you complete a 2023-2024 FAFSA, including utilization of the IRS Data Retrieval Tool (DRT) to transfer tax data for the student and/or parent (if applicable), and after you receive your initial 2023-2024 award.

Special circumstances submitted after Oct. 13, 2023 (Fall) or Mar. 8, 2023 (Spring) may not be able to be processed.

Student Information

Student Name _____ Student ID _____ Phone Number (include area code) _____

❑ Change of Financial Circumstances

Required documentation:

- Detailed personal statement of circumstances for loss of employment; include current work status and pay frequency.
- Completion of the verification process. Submit the 2023-2024 Verification Worksheet. The Office of Financial Assistance will notify you of any additional documents needed to complete the verification process.
- Submit a signed copy of your (or your parents', if dependent) 2022 tax return and all 2022 W2s.
- Submit documentation from former employer confirming loss of income, date of separation, and any severance pay amount.
- Submit copies of most recent full month's pay stubs from current job (if applicable).
- Submit a printout of the Texas (or applicable state) Workforce Commission Claim and Payment statement (unemployment benefits, etc.)

Changes to finances due to divorce, death, etc. are submitted through the Parent or Student Marital Status forms

❑ Change in household size* due to pregnancy:

Required documentation:

- Attach a letter from your obstetrician indicating the date and proof of pregnancy.
- Completion of the verification process. Submit the 2023-2024 Verification Worksheet. The Office of Financial Assistance will notify you of any additional documents needed to complete the verification process.

Changes to household size due to divorce, death, etc. are submitted through the Parent or Student Marital Status forms

❑ Unusual Medical Expenses

Required documentation:

- Attach a copy of your 2022 Schedule A Form from the 2022 Federal tax return. Expenses are considered unusual if they exceed 11% of the family's income. Expenses must appear in the 2022 Schedule A form.
- Attach a detailed letter explaining what the medical expenses are for. Orthodontic expenses will not be considered.
- If the Schedule A is not available, please submit Explanation of Benefit forms for the claimed expenses. Expenses for medical premiums and amounts covered by insurance will not be considered.

Certifications & Signature(s)

Initial each of the statements below to verify your understanding, and sign/date. Parent signature is required for dependent students.

_____ I understand that submitting this request for re-evaluation may not change the outcome of my FAFSA eligibility or result in additional grant funding but will allow the Office of Financial Assistance the opportunity to review my circumstances.

_____ I certify the information on this appeal to be complete and accurate and that I have attached the required documentation. If any of the information changes, I understand I must promptly notify the Office of Financial Assistance and that I may be responsible for repayment of financial aid received if I fail to do so.

Student Signature _____ Date _____ Parent Signature *(required for dependent students)* _____ Date _____