

STUDENT FINANCIAL AID INCOME REDUCTION EVALUATION

2022-2023

Last Name	First Name	M.I.
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Date of Birth	SS#	SID#
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Home Phone Number _____ Work Phone Number _____

The Higher Education Act provides authority for the financial aid administrator to exercise discretion in a number area based on special circumstances. Special circumstance is the ability of a financial aid administrator to review a student's financial aid based on unusual circumstances. These special circumstances are conditions that differentiate an individual student from a class of students rather than conditions that exist across a class of students.

You must complete Step One and Step Two.

STEP ONE

Unemployment or Change of Employment Status:

Check the Appropriate Line:

Student **Spouse** **Father** **Mother**

Documents Required:

Letter from previous and or current employer (**on company letterhead**) stating:

- Last date of employment
- Reason for unemployment
- 2020 earnings up to the last date of employment
- 2021 earnings up to the last date of employment
- 2022 earnings up to the last date of employment
- Statement from Unemployment Office regarding Unemployment Benefits
- Retirement Pay statement

NOTE: You must be unemployed for at least eleven (11) weeks.

Divorce/Legal Separation:

Student/Spouse **Father/Mother**

Documents Required:

- A copy of the divorce decree OR a letter from the attorney verifying the separation date.
- 2020 W-2's and 2020 federal tax return for student or supporting parents.
- 2021 W-2's and 2021 federal tax return for student or supporting parents.

Death

___ Spouse ___ Father ___ Mother

Documents Required:

- A copy of the death certificate and obituary.
- 2020 W-2's and 2020 federal tax return of student or surviving parent.

Disability

___ Student ___ Spouse ___ Father ___ Mother

Documents Required:

- A letter from the physician stating the nature and date of the disability.
- Documents supporting Social Security benefits expected in 2021.

Loss of benefits and or untaxed income

___ Student ___ Spouse ___ Father ___ Mother

Documents Required:

- Documentation certifying loss of a benefit or untaxed income.

One-time income (examples: inheritance, IRA distribution, retroactive lump sum Social Security payments).

___ Student ___ Spouse ___ Father ___ Mother

Documents Required:

- Documentation of one-time income including amount and type

STEP TWO

Estimated income for the 2022 calendar year January 1 through December 31, 2022

Note: Write in zero (0) if any item does not apply

Taxable Income

___ Student ___ Spouse ___ Father ___ Mother

Person Affected: _____ Person Affected: _____

Wages	\$ _____	\$ _____
Unemployment benefits	\$ _____	\$ _____
Pensions	\$ _____	\$ _____
Alimony	\$ _____	\$ _____
Other taxable income	\$ _____	\$ _____

