

# 2020-21 Special Circumstance Review Request

*This worksheet and any accompanying tax documents should be submitted in person, by postal mail, fax, or through password-protected email. Any and all submitted tax documentation must have the student's BW ID number on the top of the form, without the ID it will NOT go in the student's file.*

Student Last Name: \_\_\_\_\_ First: \_\_\_\_\_ BW Student ID #: \_\_\_\_\_

The BW Financial Aid Office (FAO) recognizes that sometimes the FAFSA does not adequately reflect a family's financial situation due to extenuating circumstances not properly reflected on the FAFSA. The FAO is given authority by federal regulation to make adjustments to information submitted on a FAFSA on a case-by-case basis if we believe such adjustments are warranted. Listed below are situations in which we may consider making adjustments.

**As part of the Special Circumstance Review process, you may also be required to complete the Federal process of "verification".** The Verification Worksheet is included in this packet and outlines the additional information the FAO needs from you, which may include signed IRS tax documents. If you were selected but have not already completed the verification process prior to submitting this special circumstance review request, **you must submit copies of your signed IRS 1040 and accompanying schedules, wage statements, or successfully used the IRS Data Retrieval Tool option on your FAFSA. You may still be asked for tax documentation.**

You may type your answers directly onto these forms, however, an ink signature is required on this form and the Verification Worksheet. To submit, you may a) attach a scanned copy of your signed forms and all required supporting documents in a password-protected email to [finaid@bw.edu](mailto:finaid@bw.edu); or b) print your completed form and mail or drop off to our office at the address below (with all required supporting documents). **Please note: Your request may not result in an increase of your financial aid eligibility. If it does, a revised Award Letter will be issued.**

***ALL documentation is required before your request can be reviewed.  
Missing or incomplete information may delay the processing of your request.***

**Please indicate the circumstance(s) which you feel warrants a review of the information on your FAFSA:**

☐ Loss of job. *The following supporting documents are required:*

- Documentation which indicates the job loss and the last date of employment (e.g., a letter from the employer)
- Documentation of severance and/or unemployment pay received (or to be received) in 2019 or 2020
- Copy of most recent paystub(s) from all jobs held by the identified "dislocated worker"
- Copies of all W2s from your latest tax year (dependent students - submit your parents' W2s; independent students - submit your and your spouse's W2s if you are married)
- Most recent IRS Tax Return Transcript (preferred) or signed IRS Tax Return

Please indicate name of dislocated worker: \_\_\_\_\_ Last date of employment: \_\_\_\_\_

Please indicate the former company name: \_\_\_\_\_

☐ Retirement. *The following supporting documents are required:*

- Copy of most recent paystub(s) from all jobs held in past year by parents (dependent students) or spouse (if student is married)
- List of source(s) and amount(s) of retirement income received (or to be received) in 2019 or 2020
- Copies of all W2s from past year (dependent students - submit your parents' W2s; independent students - submit your and your spouse's W2s if you are married)
- Most recent signed IRS Tax Return (IRS Form 1040 and accompanying schedules)

Please indicate name of retiree: \_\_\_\_\_ Last date of employment: \_\_\_\_\_

☐ Separation or divorce. *The following supporting documents are required:*

- Copy of separation agreement or divorce decree
- Copy of all W2s from last year (dependent students - submit your parents' W2s)
- Copy of the most recent paystubs from all jobs held in past year by the student (if independent) or the parent with whom the dependent student lives
- Most recent signed IRS Tax Return (IRS Form 1040 and accompanying schedules)

Date of separation or divorce: \_\_\_\_\_ Please indicate which parent the student lives with: ☐ Mother ☐ Father

☐ Death of a parent. *The following supporting documents are required:*

- Copy of Death Certificate or Verification of Death
- Most recent signed IRS Tax Return (IRS Form 1040 and accompanying schedules)
- Most recent W2s for the dependent student's surviving parent

Please indicate name of the deceased: \_\_\_\_\_ Date of Passing: \_\_\_\_\_

☐ Medical expenses not covered by insurance. *The following supporting documents are required:*

- Documentation that medical expenses were paid by student or parent in the past year.
- Listing of the medical expenses paid by the parent/student along with copies of receipts or canceled checks.
- If the out of pocket medical expenses were claimed on your most recent tax return, that can be acceptable documentation.

Indicate total amount of Medical Expenses (not covered) paid by student or parent within past year: \$ \_\_\_\_\_

☐ Loss of income in 2019 or 2020.

- Proof of reduction of hours and/or income loss (e.g. wage statements or letter from company's HR office)
- Proof of one-time, non-recurring payout used for current expenses (e.g. inheritance, early withdrawal from retirement, etc.)

☐ Loss of untaxed income in 2019 or 2020 (i.e. reduction in child support received, etc.).

Who was directly receiving this benefit? ☐ Student ☐ Parent

- Please explain in the space provided below and provide appropriate documentation.

☐ Other.

- Please explain in the space provided below and provide appropriate documentation.

**Please describe your circumstance(s) in the space below (or attach a letter). Please print clearly.**

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**Certification:**

I/We affirm that the data contained on and submitted with this form is true and complete to the best of my/our knowledge.

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

Student email address: \_\_\_\_\_ Student Phone #: \_\_\_\_\_

Parent signature (dependent students only) \_\_\_\_\_ Date: \_\_\_\_\_

Parent email address: \_\_\_\_\_ Parent Daytime Phone #: \_\_\_\_\_

# 2020-21 Projected Income Worksheet

(to be submitted with Special Circumstance Review Request form)

2020-21 Financial Aid Awards are based on the 2018 financial information that you and your family provided on the 2020-21 FAFSA. If you have requested a special circumstance review because your resources for 2019 or 2020 will be significantly different than in 2018, please complete the table. If you need to estimate information, please be as accurate as possible to avoid later adjustments to your financial aid.

Enter "0" or "N/A" where appropriate. Do not leave any item blank. Be sure to attach supporting documentation, such as final paystub from a lost job, statement of unemployment benefits, etc., as explained on the Special Circumstance Request Form.

Student Last Name: \_\_\_\_\_ First: \_\_\_\_\_ BW Student ID #: \_\_\_\_\_

Actual Income (January 1, 2020 to present)	+	Estimated Income (present to December 31, 2020)	=	Total Income (Actual + Estimated)
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## 2020 Gross Taxable Income

### Wages, salaries, compensation

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Student

\_\_\_\_\_

Student's spouse (if applicable)

\_\_\_\_\_

Parent #1 (dependent students only)

\_\_\_\_\_

Parent #2 (dependent students only)

\_\_\_\_\_

### Severance Pay

\_\_\_\_\_

### Separation Bonus

\_\_\_\_\_

### Net income OR loss from business

\_\_\_\_\_

### Rental property income OR loss

\_\_\_\_\_

### Unemployment compensation

\_\_\_\_\_

### Other taxable income (Enter source below)

\_\_\_\_\_

## 2020 Untaxed Income

### Workers Compensation

\_\_\_\_\_

### Child support received

\_\_\_\_\_

### Veteran's Benefits

\_\_\_\_\_

### Other untaxed income

\_\_\_\_\_

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent signature (dependent students only): \_\_\_\_\_ Date: \_\_\_\_\_

# 2020-21 Verification Worksheet

*This worksheet and any accompanying tax documents should be submitted in person, by postal mail, fax, or through password-protected email. Any and all submitted tax documentation must have the student's BW ID number on the top of the form, without the ID it will NOT go in the student's file.*

## Section 1. Student Information

Last name: \_\_\_\_\_ First name: \_\_\_\_\_ BW Student ID #: \_\_\_\_\_  
 Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Daytime Phone #: \_\_\_\_\_

*When verification of your FAFSA is complete and a change has been realized, you will be notified in one of the following ways:  
 1) you will receive your first award letter; 2) you will receive a revised award letter; or 3) you will receive other communication from our staff.  
 If the verification does not result in any changes, the awards listed on your most recent award letter will be finalized.*

## Section 2. Household Information

1) Select your status. You are considered a dependent student if you were required to provide parental information on your FAFSA.

- ☐ **Dependent students:** List the people in your parents' household, excluding foster children. Include:

  - (1) yourself, regardless of where you live,
  - (2) the parent(s) with whom you live,
  - (3) your parents' other children and other people, if (a) your parents will provide more than half of their support between 7/1/20 - 6/30/21 or (b) the children could be considered a dependent on their own FAFSA.

☐ **Independent students:** List the people in your household, excluding foster children. Include:

  - (1) yourself,
  - (2) your spouse, if you are married,
  - (3) your children and other people, if you will provide more than half of their support from 7/1/20 through 6/30/21.

2) Write your name and age on the first line below. **THEN** list the names, ages, and relationships to you for everyone else in your household (per the guidelines above). If anyone *but your parents* will be enrolled at least half-time in a degree or certificate program between July 1, 2020 and June 30, 2021, include the name of the school they will be attending. If more space is needed, continue this table on a separate page with the student's name and BW Student ID # at the top.

Full name	Age	Relationship to Student in Section 1	College/University in 2020-21
		Self (student from Section 1)	Baldwin Wallace University

## Section 3. Tax Forms and Income Information (Check boxes that apply.) Do not leave this section blank!

	TAX FILER: Filed a 2018 Federal Tax Return (see below)	NON-TAX FILER: Earned income in 2018 but did not file/was not required to file a 2018 Federal Tax Return (see below)	NON-TAX FILER: Did not earn income in 2018 and did not file a 2018 Federal Tax Return (see below)
You (student)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your spouse (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your parent #1 (dependent students only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your parent #2 (dependent students only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**TAX FILERS:** If you did not use the IRS Data Retrieval Tool you will be required to submit a signed copy of your 2018 IRS tax return or if you are unable to locate a copy, you can submit a 2018 IRS Tax Return Transcript from the IRS (available online - [www.irs.gov/transcript](http://www.irs.gov/transcript)). Refer to the Missing Information Email/Letter the student received from our office to determine if tax return information must be submitted. *This information can also be obtained by most students on myRecords. bw.edu under Financial Aid > Required Financial Aid Documents.*

**NON-TAX FILING PARENTS AND INDEPENDENT STUDENTS:** Each non-tax filing parent and independent student who earned income in 2018 **must submit all W-2 and 1099 forms received for the 2018 tax year.** If you do not have copies, contact your place of employment. Non-filers will also require the submission of a "Verification of Non-filing" from the IRS dated on or after October 1, 2019 attesting that he/she did not file a 2018 IRS income tax return. "Verification of Non-filing" may be ordered by submitting IRS Form **4506-T** and **checking box 7**. The form is available at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>.

**Section 4. Certification.** By signing this worksheet, I (we) certify that all information reported is complete and correct. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Parent signature (dependent students only): \_\_\_\_\_ Date: \_\_\_\_\_