

SPECIAL CIRCUMSTANCE FORM

2023-2024

STUDENT'S NAME: _____ MSJ ID #: _____

PERMANENT ADDRESS: _____

INSTRUCTIONS: This form should be completed by families who are experiencing changes in their 2023 financial status or who have unusual expenses as a result of one or more of the following situations. Please check all that apply, provide as much explanation as possible, attach the appropriate documentation, then sign and return all information directly to the Student Administrative Services Office to request a review of your 2023-2024 financial aid application.

SPECIAL CIRCUMSTANCES: Please check the item(s) below which describe your current situation.

1) You or your parent(s)/spouse's 2023 income will be significantly lower than your 2021 income due to:

☐ A change in employer. Effective Date: _____

Required Documentation:

- Complete the estimated income section on page 3.
- Letter from employer indicating last day of employment and amount of benefits to be paid out (e.g., severance pay, vacation pay, etc.)
- Copy of the final pay stub from previous job.
- Letter from new employer indicating start date and pay rate, and a copy of the most recent pay stub from your current job.

☐ Loss of job or retirement from job. Effective Date: _____

Required Documentation:

- Complete the estimated income section on page 3.
- Letter from employer indicating last day of employment and amount of benefits to be paid out (e.g., severance pay, vacation pay, etc.)
- Copy of the final pay stub from previous job.
- Notice from Bureau of Employment Services, which indicates eligibility for unemployment compensation.

☐ A reduction in or loss of child support, social security benefits, or other benefits received.

Required Documentation:

- Complete the estimated income section on page 3.
- Copy of a notice of benefit termination, or a copy of the court order that specifies when payments cease.

☐ Receipt of a lump-sum payment in 2021 which will not be received in 2023.

Required Documentation:

- Complete the estimated income section on page 3.
- Copy of 2021 federal tax return.
- Provide documentation of source of lump sum payment.
- Provide documentation of how the lump sum payment was used.

☐ Separation or divorce after filing the 2023-2024 FAFSA. Separation/Divorce Date: _____

Required Documentation:

- Copy of divorce decree or separation agreement, if available.
- Use the back page to list the name and address of spouse, custodial parent, and any agreements for payment of University expenses.
- Copy of 2021 federal tax return.
- Copy of W-2 forms.

☐ Other: _____

2) **You or your parent(s)'/spouse's 2021 income does not accurately reflect your available income because:**

- ☐ In 2023-2024, the family will pay tuition of more than \$3500 to private elementary or high school (s). Do not include the amount of tuition paid for college student(s). The amount to be paid is \$_____

Required Documentation:

- Letter from school(s) stating the name of each child enrolled for the 2023-2024 school year, his/her grade level, and the amount of **tuition to be paid. The amount reported should be reduced by any scholarships, grants or need-based aid the student will receive. Please do not include any fees.**
- Complete the information requested below.

Child's Name	Age	Grade	Elementary/Secondary School	Tuition

- ☐ In 2022, the family paid more than 11% of their adjusted gross income for medical and/or dental expenses which was not covered or reimbursed by insurance. The amount paid was \$_____

Required Documentation:

- Copy of 2022 1040 Schedule A (if Schedule A was not filed, submit a statement from your health insurance provider indicating amount of bills not covered by insurance. Attach a statement as to the portion actually paid during 2022.)
- If you wish to explain any unusual medical expenses, please do so below. Continue on page four if more space is needed.

- 3) Use the space on page 4 to explain the circumstances affecting your ability to contribute to your education costs (attach additional pages if necessary).
- 4) If you checked any item under section #1, you must complete the estimated income section(s) on page 3.
- 5) Complete the attached Verification Worksheet with all documentation for review to be considered

Appeals will NOT be considered until all supporting documents and tax returns are submitted to the Student Administrative Services Office.

ESTIMATED 2023 INCOME

Please complete this section if the family (including parents', stepparents', and/or student's) income will DECREASE in 2023. You should provide your best estimates of the amounts you will receive from all sources (include taxable and non-taxable income) from January 1, 2023 through December 31, 2023.

1. Parent(s) Information

Father's 2023 anticipated gross
earned income \$ _____

Mother's 2023 anticipated gross
earned income \$ _____

2023 Interest/Dividend Income \$ _____

Alimony Received \$ _____

Unemployment Compensation \$ _____

Family's 2023 other taxable income \$ _____

Child Support \$ _____

Welfare Benefits \$ _____

Veteran's Benefits \$ _____

Worker's Compensation \$ _____

Disability Benefits \$ _____

Family's 2023 other non-taxable
income not listed above. Circle those
that apply: interest on tax-free bonds,
IRA/KEOGH plans, untaxed pensions,
untaxed capital gains, and living allow-
ance for military and clergy. \$ _____

TOTAL \$ _____

2. Student/Spouse Information

Student's 2023 anticipated gross
earned income \$ _____

Spouse's 2023 anticipated gross
earned income \$ _____

2023 Interest/Dividend Income \$ _____

Alimony Received \$ _____

Unemployment Compensation \$ _____

Family's 2023 other taxable income \$ _____

Child Support \$ _____

Welfare Benefits \$ _____

Veteran's Benefits \$ _____

Worker's Compensation \$ _____

Disability Benefits \$ _____

Family's 2023 other non-taxable
income not listed above. Circle those
that apply: interest on tax-free bonds
IRA/KEOGH plans, untaxed pensions,
untaxed capital gains, and living allow-
ance for military and clergy. \$ _____

TOTAL \$ _____

STATEMENT AND CERTIFICATION

I (We) hereby affirm that all information reported on this form and any attachments hereto is true, complete, and accurate to the best of our knowledge. I (We) understand that if I (we) receive federal student aid based on incorrect information, I (we) will have to pay it back; I (we) may also have to pay fines and fees. If I (we) purposely give **false or misleading information** on this form, I (we) may be fined \$10,000, sent to prison, or both.

PLEASE NOTE: If this form is submitted after January 1, 2024 you must include a signed 2023 federal tax return and 2023 W-2 forms.

Student's Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

Student Email: _____

For Dependent Student's Only:

Father/Stepfather's Signature: _____ Date: _____

Mother/Stepmother's Signature: _____ Date: _____

Parent Email: _____

[illegible]

4



U.S. Department
of Education

DEPENDENT

2023-2024 VERIFICATION WORKSHEET

FEDERAL STUDENT AID PROGRAM



MOUNT ST. JOSEPH
UNIVERSITY

Your application was selected for review in a process called verification. The law says that, before awarding federal aid, we have the right to ask you to confirm information reported on your Free Application for Federal Student Aid (FAFSA) using this worksheet and other required documents. If there are differences, your FAFSA information will be corrected. Authority to request and review information is provided under the financial aid program rules (34 CFR, Part 686). More info: <https://www.msj.edu/tuition-aid/policies-rules-regulations/verification/>

Notice About Income Verification: Income information for tax filers must be matched with data on file with the Internal Revenue Service (IRS). See page 2. As such, persons who have not filed their 2021 taxes* will not be able to complete verification until they have filed and their tax information is available from the IRS. Availability of information for online IRS Data Retrieval or IRS Tax Return Transcripts can take up to 2 weeks of filing taxes electronically and up to 8 weeks following paper tax filing.

*Persons filing a tax deadline extension will have to complete the verification process now and again after filing taxes.

You must complete and sign this worksheet

Non-Scholarship aid will not be available until the verification process, as outline on this worksheet, is complete. Preliminary Awards are estimates of eligibility. Any delay can cause the loss of eligibility or limited aid sources. Failure to complete verification prior to the last day of enrollment can result in total loss of eligibility.

A. Student Information

Check one: ☐ Incoming Freshman or Transfer Student ☐ Continuing Student

Last Name	First Name	M.I.	MSJ Student ID # (required for completion)
Address (include apt. # if applicable)			Date of Birth
City	State	Zip	Phone Number (include area code)

B. Family Information

List the people in your parent(s) household. Include:

- Yourself and your parent(s) (including step-parent) that you listed on the FAFSA, even if you don't live with your parent(s).
- Your parent(s) other children, even if they don't live with your parent(s), if (a) your parents will provide more than half of their support from July 1, 2023 through June 30, 2024, or (b) the children would be required to provide parental information when complete a FAFSA.
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support. They must continually provide more than half of their support through June 30, 2024.

Provide the names of all household members. Include the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between July 1, 2023 and June 30, 2024, and will be enrolled in a degree, diploma, or certificate program.

If you need additional space, attach a separate page.

Full Name	Age	Relationship	College/University	Will be enrolled at least half-time?
Bill Miller (example)	18	Brother	State University	Yes
		Self	Mount St. Joseph University	

Important Income Information for Tax Filers

IRS DATA RETRIEVAL: Best way to verify income is to use the IRS Data Retrieval Tool (IRS DRT) within FAFSA.

- Go to StudentAid.gov, log into your FAFSA record, select “Make FAFSA Corrections”, and navigate to the Student/Parent Financial Sections
- If eligible to complete the process, use the IRS DRT to transfer 2021 IRS income tax information to the FAFSA for Student and/or Parent.
- When using the IRS DRT, do not modify income after transferring into the FAFSA. If modified, Transcript option will be required

IRS TAX RETURN TRANSCRIPT: If you are unable, or choose not, to use the IRS DRT, an IRS Tax Return Transcript will be required.

- Go to *IRS.gov* and use the “Order a Return or Account Transcript” link or call 1-800-908-9946.
- Make sure to request a 2021 **TAX RETURN TRANSCRIPT**.
- SSN, date of birth, and address used on the taxes needed for each tax filer when requesting. IRS will only send transcript to address on file
- Married persons filing separate tax returns (or newly single who filed jointly) must use Transcript option to request tax information for both.
- Transcripts must be submitted with this verification worksheet.

IRS TAX RETURN: If you did not use the IRS DRT or provide a tax return transcript, a **signed** copy of your filed 2021 taxes including schedules is required.

C. Student Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page, and check only **one** of the boxes.

- ☐ IRS DRT in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (either on initial or corrected FAFSA). No modifications were made to income data.
- ☐ Student unable, or chooses not, to use IRS DRT. 2021 IRS Tax Return Transcript or **signed** 2021 Federal Tax Return(s) including schedules is attached.
- ☐ Student filed an amended return. 2021 IRS Tax Transcript *and* copy of signed 2021 1040X are attached.
- ☐ Student attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below. *

2. **TAX RETURN NON-FILERS:** Complete this section if student will not file and is not required to file a 2021 income tax return with the IRS.

- ☐ Student not employed; no earned income in 2021
- ☐ Student employed and completed info. Every employer, even if they didn't issue a W-2, must be listed. W-2s must be provided if issued.

Employer's Name	2021 Income	W-2 Issued?

D. Parent(s) Income Information

1. **TAX RETURN FILERS:** Review information at the top of this page, and check only **one** of the boxes.

- ☐ IRS DRT in FAFSA on the Web was used to retrieve and transfer IRS income information for the student (either on initial or corrected FAFSA). No modifications were made to income data.
- ☐ Parent(s) unable, or chooses not, to use IRS DRT. 2021 IRS Tax Return Transcript or **signed** 2021 Federal Tax Return(s) including schedules is attached.
- ☐ Parent(s) filed an amended return. 2021 IRS Tax Transcript *and* copy of signed 2021 1040X are attached.
- ☐ Parent(s) attached a copy of tax filing extension request. W-2 forms are also attached with information noted in the section below. *

2. **TAX RETURN NON-FILERS:** Complete this section if parent(s) will not file and are not required to file a 2021 income tax return with the IRS.

- ☐ Parent(s) not employed; no earned income in 2021
- ☐ Parent(s) employed and completed info. Every employer, even if they didn't issue a W-2, must be listed. W-2s must be provided if issued.

Employer's Name	2021 Income	W-2 Issued?

E. Certification and Signatures

By signing this worksheet, we certify that all information reported is complete and correct. At least one parent must sign.

Student Signature Date

Parent Signature Date

WARNING: If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.

*Extension filing will require the completion of verification again after taxes are filed and could result in loss of aid eligibility including a balance owed immediately to Mount St. Joseph University.

Do not mail this worksheet to the U.S. Department of Education. Mail, fax, or bring to Mount St. Joseph University. Keep a copy for your records.

Office of Student Administrative Services
Mount St. Joseph University
5701 Delhi Road, Cincinnati, OH 45233-1670
Phone – (513) 244-4418
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