



Ozarka College
Providing life-changing experiences through education.

Special Circumstances Appeal (Income Reduction)

Purpose: The Financial Aid Department recognizes that you may have extenuating circumstances that affect your financial situation. If you believe the Free Application for Federal Student Aid (FAFSA) does not reflect an accurate financial picture, you may submit this request to have your FAFSA reviewed. The following are examples of extenuating circumstances: layoffs, reduction of income or benefits, unusual medical and dental expenses, supporting other relatives, elementary and secondary school costs, child-care and dependent-care costs.

Requirements:

- You must have submitted the FAFSA for 2024-2025. This can be done online at www.fafsa.gov.
- This completed form. Note that this form and all required documentation must be submitted no later than 30 days prior to the end of the enrollment period.
- If you did not utilize the IRS Data Retrieval Tool when completing the FAFSA, include a copy of the student's and parents' 2022 Tax Transcripts (or a **signed** copy of the 2022 Federal Tax Return) and all W-2 forms.
- A completed Verification Worksheet (*the verification worksheet is included at the bottom of this application (pages 4 and 5)*).
- A typed, dated, and signed narrative detailing the circumstances that is leading to this request. Be specific- provide dates and clearly identify the person to whom the narrative refers.

Please review the entire application and make sure the application is complete BEFORE submitting an Special Circumstances appeal form to our office.

Examples of Special Circumstances Considered:

- Death, divorce, or separation of parents or spouse
- Loss or reduction of income (layoff, illness, forced reduction of hours, temporary employment, etc.)
- Catastrophic medical or dental expenses
- Non-recurring payments receiving during the FAFSA tax year that will not be repeated
- Loss of benefits, such as unemployment, disability, social security, veterans, child support, or alimony

Examples of Special Circumstances NOT Considered:

- Pending reduction in income due to fluctuating commissions, consumer debt (unless necessitated by economic hardship)
- Refusal of a parent to provide financial support to the applicant/student
- Anything that “might happen” in the future.

Upon receipt of all required documentation, appeals will be reviewed by the Financial Aid Office to determine if the circumstances comply with the Department of Education's regulations governing special circumstances appeals. During peak processing times, please allow 4 - 6 weeks for processing. Results of this appeal will be sent to the student via their myozarka email address.

By signing this form,

- I give permission to the Financial Aid Office to verify any information that I provide on this form. I understand that this verification may include a request for my tax documents.
- I certify that all of the information provided on this form is correct to the best of my knowledge.
- I understand that if I purposely give false or misleading information on this form, I am liable for cancellation or repayment of all or part of my financial aid.
- I understand that reporting a Special Circumstance does not guarantee a recalculation of my Student Aid Index (SAI) and/or an increase in financial aid funding.

Student's Signature: _____ Date: _____
 Student's Printed Name: _____ Student ID: _____
 Email Address: _____ Phone Number: _____

Please complete the section of the form that applies to you: Each section will describe the documentation that will be required in addition to what is listed at the top of this form.

- ☐ **1. Change in marital status- including divorce/separation and loss of parent/spouse**
Required Documentation: Copy of separation order or divorce decree (if no legal document is available, provide proof of separate residence such as lease(s), mortgage(s), utility bill(s), etc.); copy of death certificate for loss of parent/spouse.

Please check one of the following:

___ Separated ___ Divorced ___ Widowed Date marital status changed: _____
 MM/DD/YY

- ☐ **2. Significant change in income between 2022 taxes and 2023 taxes**
Required Documentation: Signed copies of 2023 taxes and 2023 W-2s.

Check in front of the party for which income changed between 2022 and 2023 taxes.

Independent Students: ___ Student ___ Spouse
 Dependent Students: ___ Student ___ Parent(s)

- ☐ **3. Significant change in income between 2022 taxes and projected year 2024 income**
Required Documentation: Signed copies of 2023 taxes and 2023 W-2s, completed Special Conditions Form, and a copy of the most recent pay stub for all jobs worked in 2024, proof of unemployment compensation, etc.

(Note that we will not review projected 2024 income requests until July 2024.)

Check the box in front of the party for which income changed between 2022 and 2024.

Independent Students: ___ Student ___ Spouse

Dependent Students: ___ Student ___ Parent(s)

Please complete the following Anticipated Income Table, being sure to notate how you calculated these figures.

ANTICIPATED INCOME 2024 Calendar Year	FATHER	MOTHER	STUDENT	SPOUSE (if married)
Wages/salaries, (including severance pay, disability payments and any other income from work)				
Other taxable income (unemployment compensation, interest/dividend income, etc.). List type(s) of income on attached statement				
Child support received				
Other untaxed income (payments to tax deferred pension/savings plans, workers compensation, etc.). List type(s) of income on attached statement				
TOTAL ANTICIPATED INCOME for 2024				

- ☐ **4. Loss of child support**
Required Documentation: Documentation that details the change in child support payments from the state Child Support Agency.

Additional Expenses:

- ☐ **5. Out-of-pocket medical or dental expenses**
Required Documentation: Schedule A or itemized spreadsheet that totals expenses, along with documentation supporting listed expenses not covered by insurance, Health Savings Account, or Flexible Spending Account. 2022 Taxes, if medical expense adjustment is for expenses incurred in 2022.
- ☐ **6. Paying private tuition for dependents**
Required Documentation: Proof of payments, such as a detailed statement of account.
- ☐ **7. Other-**
Required Documentation: Please explain in the required dated and signed narrative detailing the circumstances that are leading to this request and submit any documentation supporting those circumstances.
- ☐ **8. STUDENT VERIFICATION WORKSHEET (all students must complete this worksheet)**

Student Verification Worksheet

Parent information is required on this form ONLY if the student was required to provide parental information on the FAFSA

Family Size: Includes the following: Check the appropriate box and provide the requested information

☐ **Dependent Student:**

- The student.
- The student's parents, even if the student is not living with them. Exclude a parent who has died or is not living in the household because of separation or divorce. Include a parent who is on active duty in the U.S. Armed Forces apart from the family.
- The student's siblings if the following are true:
 - They live with the student's parents (or live apart because of college enrollment),
 - They receive more than half of their support from the student's parents, and
 - They will continue to receive more than half their support from the student's parents during the award year.
- Other persons if the following are true:
 - They live with the student's parents.
 - They receive more than half of their support from the student's parents, and
 - They will continue to receive more than half their support from the student's parents during the award year.

☐ **Independent Student:**

- The student.
- The student's spouse, if applicable.
- The student's dependent children if the following are true:
 - They live with the student (or live apart because of college enrollment),
 - They receive more than half of their support from the student; and
 - They will continue to receive more than half their support from the student during the award year.
- Other persons if the following are true:
 - They live with the student.
 - They receive more than half of their support from the student, and
 - They will continue to receive more than half their support from the student during the award year.

The provided criteria for "dependent children" or "other persons" align with the requirement that family size align with whom the parent or student could claim as a dependent on a U.S. tax return if the student were to file a U.S tax return at the time of completing the 2024-2025 FAFSA. As a result, the student should not include any unborn children in the family size.

Full Name	Age	Relationship

Please check the box(es) below that describes the tax filing status on the FAFSA for the student, spouse (if applicable), and each parent(s) (if applicable).

Ex: If student is independent and single, check one box for student. If student is married, check one box for student and one box for spouse. If student is dependent, check one box for student and one or two boxes for parent(s), depending on their marital status

	Student	Spouse	Parent 1	Parent 2
With my consent and approval; my 2022 federal tax information (FTI) was transferred to my FAFSA via Future Act Direct Data Exchange (FADDX)				
I was unable to use the FA-DDX and manually entered my income and tax data. I will submit a signed copy of my 2022 tax return and any other required W-2s/schedules. (Due to current marital status).				
I worked in 2022 but did not (and was not required to) file a 2022 tax return. If checked; (Please complete the chart below).				
I was not employed and had no income earned from work in 2022.				

If you worked in 2022, but did not file taxes:

List every employer, even if the employer did not issue an IRS W-2 form. Provide copies of all 2022 IRS W-2 forms issued. If more space is needed, provide a separate page with the student's name and ID number at the top.

Employee's Name	Employer's Name	Annual Amount Earned in 2021	IRS W-2 or Equivalent Document Provided?
<i>Student/Spouse or Parent's Name</i>	<i>(Example) Finnigan's Spa and Beauty Bar</i>	<i>\$4500.00</i>	<i>Yes</i>

- ◇ An equivalent document to a W-2 form is any document that shows the amount of income earned from work and the amount of taxes withheld, such as a pay stub or an earnings statement. If you are self-employed, you may need to provide a signed statement certifying the amount of your Adjusted Gross Income (AGI) and the U.S. income tax paid for the applicable tax year.
- ◇ If your employer paid you in cash, you still need to report income.

*** An IRS Verification of Non-filing Letter or other confirmation of non-filing is only required when verifying income earned from work for a nontax filer who would file a tax return with a tax authority other than the Internal Revenue Service (IRS).

_____ Check her if a non-filing letter is provided.

_____ Check her if a non-filing letter will be provided later.

Certification and Signature

Each person signing below certifies that all of the information reported is complete and accurate. The student and one parent (if applicable) must sign and date. I give the Ozarka Financial Aid Office authorization to make necessary corrections.

Student's Signature

Date

Parent's Signature

Date