

Wheeling University 2020-2021 Special Conditions Form

Student Name: _____ Student ID #: _____

If you or your family have/has experienced a loss in income or unusually high medical expenses, Wheeling University may be able to make adjustments to your Expected Family Contribution (EFC). In order to take the special condition into consideration, you must file a 2020-2021 Free Application for Federal Student Aid (FAFSA), complete the applicable sections below and include all necessary documentation.

Part I – Household Information

Dependent Students – list the people in your parents’ household including:

- Yourself
- Parent(s) (including step-parent) even if you don’t live with them
- Your parent(s)’ other children, even if they do not live with your parent(s), if your parent(s) will provide more than half of their support from July 1, 2020 through June 30, 2021 or if the children would be required to give parental information on the FAFSA
- Any other people if they will live with your parent(s) and will receive more than half of their financial support from them from July 1, 2020 through June 30, 2021.

Independent Students – list the people in your household including:

- Yourself and your spouse, if married
- Your children/stepchildren if you will provide more than half of their support from July 1, 2020 through June 30, 2021 or if the children would be required to provide your information if they were completing a 2020-2021 FAFSA.
- Any other people if they will live with you and will receive more than half of their financial support from you from July 1, 2020 through June 30, 2021

	Full name	Relationship	Age	Will be enrolled in college at least half time (yes or no)	College
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____
6.	_____	_____	_____	_____	_____
7.	_____	_____	_____	_____	_____

Part II – Adjustment type

Check all the conditions below that describe your situation and **attach the required documents**.

1. Death of parent or spouse

- Enter the date of death: _____
- Attach a copy of the death certificate

2. Separation or divorce of parent or student

- Enter the date of separation/divorce: _____
- If separated, please attach documentation showing individuals live at separate addresses.
- Attach a copy of legal separation/divorce or official letter from attorney stating when legal proceedings will begin.

3. Reduction of untaxed income (i.e. child support ended)

- Enter the date of change: _____
- Attach supporting documentation of lost untaxed income (i.e. court order of child support change).

4. Permanent and total disability

- Enter the date of disability: _____
- Attach a signed letter from a physician stating the extent and duration of disability.
- Attach documentation of year-to-date income.
- Attach a Disability Benefit Statement from the Social Security Administration.

5. Loss or reduction of income

- Will your total annual household income be lowest for 2019 or 2020? ___ 2019 ___ 2020
- Required documentation for 2019:
 - Verification of severance amount received in 2018 (if applicable)
- Required documentation for 2020:
 - Employer letter/document stating when your employment ended or changed
 - Verification of severance amount received in 2019 (if applicable)
 - Unemployment Benefits Statement (if applicable)
 - Final paystub from prior job with details about your current and year-to-date earnings (if applicable)
 - Most recent paystubs from all current jobs for student and parent(s) or spouse
 - Complete Part III – Estimated 2020 Income on page 4

6. Unusually high medical expenses during 2018, 2019, or 2020

- Which year were they highest? ___ 2018 ___ 2019 ___ 2020
- Attach a copy of your IRS Schedule A for year selected above.
- Attach verification of payments made toward medical expenses for year selected above.

Explanation of Special Circumstances (to be completed by parent or independent student): Please provide specific details about the changes in your financial situation since 2018. Include a timeline of any income changes and relevant employer names.

ATTACH ADDITIONAL SHEET IF NECESSARY

Part III – Estimated 2020 Income

If your total 2020 income will be lower than your 2019 income, you must complete this section.

- Complete both tables. Report all of your income before exemptions, adjustments and deductions.
- Include all income/benefits that you and/or your parent(s)/spouse expect to receive from January 1, 2020 through December 31, 2020.
- **Complete all items. If an item does not apply, you must enter “0”.**

2020 Estimated Gross Taxable Income	Dependent Students	Parent	Parent/Stepparent
	Independent Students	Student	Spouse
1. Wages, salaries, tips (including severance pay)		\$	\$
2. Pensions and annuities		\$	\$
3. Interest, dividends and capital gains		\$	\$
4. Business or farm income		\$	\$
5. Social Security benefits (taxable)		\$	\$
6. Income received from rents after expenses (mortgage interest, taxes and ins.)		\$	\$
7. Alimony		\$	\$
8. Unemployment compensation		\$	\$
9. Any other taxed income		\$	\$
Total 2020 Estimated Taxed Income (1-9)		\$	\$

2020 Estimated Untaxed Income	Dependent Students	Parent	Parent/Stepparent
	Independent Students	Student	Spouse
1. Payment to tax deferred pension and savings plan (paid directly or withheld from earnings). Including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.		\$	\$
2. IRA deductions and payments to self-employed SEP, SIMPLE and Keogh		\$	\$
3. Child support received for all children.		\$	\$
4. Tax exempt interest income.		\$	\$
5. Untaxed portions of IRA distributions.		\$	\$
6. Untaxed portions of pensions.		\$	\$
7. Living and housing allowances for clergy, military and others. <ul style="list-style-type: none"> • Include cash payments or cash value of benefits • Exclude rent subsidies for low income housing. • Members of the military should only report their total Basic Allowance for Subsistence (BAS) benefits for 2020. Do not include any military housing benefits (BAH/BAQ) or the value of on-base military housing. 		\$	\$
8. Veteran’s non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.		\$	\$
9. Any other untaxed income and benefits such as Workers Compensation, disability, etc.		\$	\$
10. Cash support or money paid on behalf of the student or family, not reported elsewhere on this form. List type(s): _____		\$	\$
Total 2020 Estimated Untaxed Income (1-10)		\$	\$

Part IV – Required Documentation

In addition to the information requested in Part II, you must also attach all of the documentation listed below. Forms without all documentation will not be reviewed.

All Students:

- Student’s 2018 and 2019 IRS Tax Transcript or 2018 and 2019 IRS Verification of Non-filing letter
- Student’s 2018 and 2019 W-2 form(s) for all 2018 and 2019 employers
- All required documentation from Part II

Dependent students must also submit:

- Parent(s)’ 2018 and 2019 IRS Tax Transcript(s) or 2018 and 2019 IRS Verification of Non-filing letter
- Parent(s)’ 2018 and 2019 W-2 form(s) for all 2018 and 2019 employers

Married students must also submit:

- Spouse’s 2018 and 2019 IRS Tax Transcript or 2018 and 2019 IRS Verification of Non-filing letter

Part V – Certification

- I understand that I must submit this form after January 1, 2020.
- I certify that the information on this form is true and correct to the best of my knowledge and belief.
- I understand that if I underestimate my income, I may have to repay any aid that I receive based on that data.

Student Signature

Date

Parent Signature (dependent student)

Date

Parent’s name (please print)

Parent contact information

Please drop off in person at the Financial Aid Office or submit via one of the following ways:

Email: finaid@wju.edu

Fax: 304-243-4397

Mail: WU Financial Aid
316 Washington Ave.
Wheeling, WV 26003