

VINCENNES UNIVERSITY

2023-2024 SPECIAL CIRCUMSTANCES REQUEST FOR AN INDEPENDENT STUDENT

Use this form to report recent changes to your or your spouse's financial situation which may impair your ability to contribute toward the cost of your education in the 2023-2024 academic year (Fall 2023 through Summer 2024). This request and all documentation must be submitted to and processed by our office while you are enrolled at Vincennes University

STEP 1. Student Information

Student Name _____ VU ID# A00 _____

Email _____ Phone# (_____) _____

Address _____ City _____ State _____ Zip _____

STEP 2. Understanding the Purpose of this Request

Your 2023-2024 financial aid is based on 2021 income and federal tax information. This form provides guidance on how to document certain changes in your financial circumstances since 2021. This may allow us to reduce certain data elements on your FAFSA and may provide a result which more accurately and fairly reflects your current financial situation. The information you provide pertains solely to the student and spouse information required for the 2023-2024 FAFSA.

The list on the second page provides the most common circumstances that allow us to make this professional judgment. You may check with a financial aid counselor if you have other circumstances that might affect your FAFSA result (EFC- Expected Family Contribution). We must have documentable circumstances to make adjustments. Not all adjustments will change your financial aid eligibility. Federal student aid regulations require our office to document why we adjusted the data elements that go into re-calculating your EFC. Please submit all required documentation with this form. Additional information may be requested upon review of your request. **Incomplete requests will not be processed.**

Evaluating your request may take several weeks to complete. Submission of this form does not guarantee increased financial aid eligibility, and any increase may not cover the full costs incurred at Vincennes University. While a decision is pending on your request, you can receive the financial aid currently indicated on your MyVU account. You will be notified by email of the final decision made on your request. The decision we make on your request is final and cannot be appealed to the U.S. Department of Education.

You are responsible for payment of your account while your request is being processed.

We will NOT consider requests for any of the following circumstances:

- Bankruptcy
- Non-essential expenses (vacations, tithing, charitable giving, high mortgage payments, credit cards, etc.) Standard
- living expenses (utilities, cable bills, cell phone, vehicle loan, tax bills, etc.)
- Standard maintenance items (lawn care, home repairs, gas, etc.)
- One-time income used for non-essential purposes (second residence, additional vehicles, recreational vehicles, etc.)
- You already qualify for maximum Pell grant and loans because you have a zero EFC.
- Medical expenses paid with pre-tax dollars, such as health insurance premiums or flexible spending accounts.

By signing this form, I certify all information is true and complete and I agree to provide all documentation that will verify the accuracy of my request. I understand that if I purposely give false or misleading information, I may be prosecuted by the U.S. Department of Education. **I understand I am responsible for payment of my account at Vincennes University.**

Student Signature _____ Date _____

STEP 3. Reason for Request & Required Documentation

You must provide the following documents and the required documentation specific to your request.

- A typed letter signed and dated by you explaining the reason for your request.
- If you have not already done so, submit a completed 2023-2024 Independent Verification Worksheet.
- If you have not already done so, submit a signed copy of your (and spouse's) 2021 federal tax returns.

Loss of income or “other” source of income in 2022 or 2023 that was reported on the FAFSA.

- Copies of your (and spouse's) 2021 W-2s, 1099s, and any schedules showing business or farm income.
- Proof of all earnings for the person(s) who is losing or lost income.
 - If for 2022, provide a signed copy of 2022 federal tax return and schedules, along with all W-2s and 1099 forms.
 - If for 2023, provide last paycheck stub from previous employer(s), printout of unemployment benefits, most recent paycheck stub if currently employed at a new job. Provide a written projection of income for the remainder of 2023 and any additional documentation that supports your income projection. If 2023 federal taxes have been completed at the time of your request, you may provide a signed copy with W-2s as documentation of income.
- If loss of employment income: A letter on company letterhead signed and dated by employer indicating last day of employment. If you do not have such a letter, include the date of loss of job in your letter of explanation.
- If loss of “other” source of income reported on the FAFSA: Provide documentation for the reason for the change and a letter stating the termination/end date; also include the total amount received for the year.

Legal separation or divorce occurred after you submitted the FAFSA. *PLEASE NOTE: If you were separated or divorced before you submitted the 2023-2024 FAFSA, you do not need to submit this request. Please call to speak with a Counselor on how to separate incomes and correct your FAFSA.*

- Copy of legal separation papers, divorce decree, or letter of intent from an attorney on attorney's letterhead. Be sure this includes the date of legal separation, divorce, or the date you were no longer living together.
- Copies of your 2021 W-2s, 1099s, and any schedules showing business or farm income.
- Complete the Asset Information Request Form (online: vinu.edu/web/financial-services/2023-2024-forms).

Death of Spouse after you submitted the FAFSA. *PLEASE NOTE: If your spouse died before you submitted the 2023-2024 FAFSA, do not complete this request. Please call and ask to speak with a Counselor for assistance on how to correct your FAFSA.*

- Copy of Death Certificate.
- Copies of your 2021 W-2s, 1099s, and any tax schedules showing business or farm income.
- Complete the Asset Information Request Form (online: vinu.edu/web/financial-services/2023-2024-forms).

Significant medical, dental, nursing home, or dependent care expenses incurred in 2021 or 2022.

Expenses being claimed must have been paid out-of-pocket by the student or spouse. Expenses covered by insurance, paid with a health or flexible savings plan (pre-tax dollars), or reimbursed by a third party cannot be submitted for consideration. In addition, an 11% Income Protection Allowance for families has already been allowed when your EFC was calculated. Therefore, expenses must be over this 11% IPA to be considered.

- If expenses were paid in 2021, submit copies of all tax schedules filed with 2021 federal tax return.
- If expenses were paid in 2022, submit a signed copy of 2022 federal tax return and all tax schedules.
- An itemized listing of expenses paid out-of-pocket.
- Proof of payment of expenses being considered, such as copies of canceled checks or invoices showing payment.

Exception to “normal” income due to an inheritance, gambling or lottery winnings, or an early withdrawal from a retirement plan.

- Copies of ALL your (and spouse's) 2021 W-2s, 1099s, and any schedules showing business or farm income.
- A signed copy of your (and spouse's) 2022 federal tax return and all schedules.
- Copies of ALL your (and spouse's) 2022 W-2s, 1099s, and any schedules showing business or farm income.
- Detailed documentation supporting your request, including receipts showing how the funds were spent.

Other

- Detailed documentation supporting your request.