

Student's Name: _____ Warrior ID Number: _____

The Special Conditions Review Form is used to report changes in circumstances that occur after filing the Free Application for Federal Student Aid (FAFSA) or to report circumstances that affect the family's ability to contribute toward college costs. The WSU Student Financial Aid Office reviews information reported to determine whether changes can be made. Check the condition(s) that apply to you and provide all requested documentation and applicable signatures.

CHANGE IN INCOME

UNEMPLOYED (If you were employed in 2020 and have become unemployed in 2021 or 2022). The Financial Aid Office will be recalculating 12 months of income from the date of unemployment and entering this information on the FAFSA. Please provide enough documentation for us to justify the special conditions and to recalculate income as accurately as possible. Lack of documentation will result in either a delay in processing or denial of special condition.

- Please wait either 90 days from date of unemployment, or until you start a new job, whichever comes first before completing this form.
- Attach a written statement indicating the date and reason you became unemployed.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules unless you used the IRS data retrieval tool on your FAFSA. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.
- Attach a copy of your most recent paystub(s) and W2s from all employers.
- Attach a copy of unemployment benefits you will receive from your state job service office.
- Attach a copy of any severance pay that was or will be received.
- Attach documentation for any other taxable income, such as money withdrawn from a retirement account (IRA, annuity, or pension), taxable social security, capital gains, inheritance, or gambling winnings.

REDUCTION IN EARNINGS OR LOSS OF OTHER INCOME

2021 or 2022 income is less than 2020 income listed on the FAFSA. This could include a reduction in earnings, loss of taxable social security benefits, one time withdrawal from a retirement account, etc. Please provide enough documentation for the Financial Aid Office to justify the special conditions and to recalculate your income as accurately as possible. Lack of documentation will result in either a delay in processing or denial of special conditions.

- Attach a written statement outlining the amount of income lost or reduced, the date the change became effective, and the reason for the loss of income.
- Attach documentation proving the loss or reduction in income (by a third party if possible). This might be a 2021 IRS tax transcript or a signed 2021 federal tax return, last paycheck stubs, a statement from social security, bank statements, letter from the court, etc.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules unless you used the IRS data retrieval tool on your FAFSA. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.

REDUCTION OR LOSS OF CHILD SUPPORT

- Attach a written statement outlining how much child support you received each month for each child in 2021 or 2022. Then explain the date of your loss or reduction in payment and for which child it occurred. Please attach any necessary documentation.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules unless you used the IRS data retrieval tool on your FAFSA. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.

CHANGE IN HOUSEHOLD SIZE THAT OCCURRED AFTER FILING YOUR FAFSA

DIVORCE OR SEPARATION

If you have already applied for financial aid, and since that time you and your spouse have gotten separated or divorced:

- Attach a copy of the divorce decree or proof of separation (court order, statement from attorney or clergy).
- Provide a statement containing the names, ages, and the relationship to you of the family members you will support through June 30, 2023.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules and 2020 W2s. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.

DEATH OF SPOUSE

- Please provide a written statement indicating your spouse's name and date of death.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules and 2020 W2s. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.

MEDICAL AND DENTAL EXPENSES

UNUSUALLY HIGH MEDICAL AND DENTAL EXPENSES NOT REIMBURSED OR COVERED BY INSURANCE

The FAFSA calculation takes into account a certain percentage of your income going towards paying medical expenses. When expenses paid exceed this percentage, the Financial Aid Office may be able to make changes to your FAFSA to account for the additional out of pocket expense. We will need third party documentation showing payments made to make any adjustments to your FAFSA. We are unable to take into account unpaid medical expenses. Lack of documentation will result in either a delay in processing or a denial of the special conditions.

- Attach a signed statement itemizing out of pocket medical or dental expenses you paid in either 2020 or 2021. These expenses should not include amounts covered by insurance, company health plans, self-employed health deductions, or insurance premiums.
- Attach documentation such as provider statements, pharmacy statements, cancelled checks, or paid receipts. Most medical facilities and pharmacies are able to provide you with annual statements of accounts.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules unless you used the IRS data retrieval tool on your FAFSA. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.
- Attach a copy of your 2021 IRS tax transcript or signed copy of your 2021 federal tax return if you are providing documentation of medical expenses paid in 2021.

EDUCATIONAL EXPENSES

PRIVATE TUITION EXPENSES AT AN ELEMENTARY OR SECONDARY SCHOOL

- Attach a copy of the 2020 tuition statement outlining costs and financial aid awarded for each dependent child attending private elementary or secondary school (do not include expenses for any children who will be attending college in 2022-2023).
- If you are divorced or separated, and the non-custodial parent provides assistance toward the private tuition, provide a statement indicating the amount of assistance.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules unless you used the IRS data retrieval tool on your FAFSA. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.

OTHER UNUSUAL CIRCUMSTANCE

- Attach a signed statement summarizing any other unusual circumstances you want the Financial Aid Office to take into consideration. Please provide applicable documentation (by a third party if possible) to support your unusual circumstance.
- Attach a copy of your 2020 IRS tax transcript or a signed copy of your 2020 federal tax return with all applicable schedules unless you used the IRS data retrieval tool on your FAFSA. The Department of Education requires verification of income reported on the FAFSA prior to a special conditions review being done.

The name of the Financial Aid Counselor I talked with about my special conditions review was

_____.

I certify the information contained in this appeal, including any supporting documentation, is accurate and true to the extent of my knowledge and belief.

Student Signature	Date	Signature of Applicable Spouse	Date
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Phone number: _____	Email: _____
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Please return form and supporting documentation to: Winona State University, Financial Aid Office
PO Box 5838
Winona, MN 55987
or fax: (507) 457-5628.