

Your eligibility for need-based aid is determined using your 2024-2025 FAFSA results. Use this form to report recent changes in your family's financial situation that are not addressed on the FAFSA that may impair your ability to contribute toward the cost of your education.

A. Student Information			
Last Name	First Name	M.I.	USI Student ID number (SSN if ID is unknown)

## **B.** Instructions (READ CAREFULLY)

- 1. Complete the 2024-2025 Free Application for Federal Student Aid (FAFSA).
- 2. Complete the 2024-2025 Special Circumstance Form and SUBMIT A SIGNED STATEMENT.
  - Section D You must check a box in Section D and answer the additional questions next to the box you checked.
  - Section E You must project 2024 Income and Resources. Do not leave this section blank.
  - Section F The student must sign the form. If the student is dependent, the form requires the parent signature as well.
  - Signed Statement Provide a typed, <u>signed</u> and detailed description of the basis of your special circumstance. Include names of employers, dates, etc. Provide any additional information that would help our office understand your family's circumstances.
- 3. <u>We will review your signed statement to determine what supporting documentation is required.</u> <u>Additional</u> <u>documentation WILL be required but will vary based on your circumstances. Continue to monitor your myUSI for updates.</u>
- 4. Submit ALL required supporting documentation. You should submit this form early so that you have plenty of time to gather the required supporting documentation.
- 5. Your documentation will be reviewed to determine if the allowable changes would increase your aid eligibility. The results will be posted on your myUSI and you will receive a letter in the mail once this process has been completed.

# C. Deadline(s) and Other Important Information (READ CAREFULLY)

- The Special Circumstance Process is optional.
- Submission of this form does not guarantee approval nor guarantee increased financial aid eligibility. This process simply allows financial aid administrators to make certain allowable adjustments, on a case-by-case basis, to the FAFSA application based on more current information. This may or may not result in a change to financial aid eligibility.
- We recommend submitting your request at least 2 weeks prior to the end of the term so that there is time to determine what additional documentation is required and time for you to gather and submit the documentation. It is important to note that, per federal regulations, we are not permitted to process a Special Circumstance once the student is no longer enrolled for the 2024-2025 academic year.

USI ID #: \_

D. Reaso	D. Reason for Appeal (CHECK THE APPROPRIATE BOX)					
Check One	Reason for Appeal	Additional Questic	Additional Questions			
	Reduction or Loss of Employment       > Name of Employment         *Do not complete/submit this form until 8 weeks from the date of the change in circumstances.       Has unemployment         *Changes may not be considered if income loss is not significant.       Date of Reduction or Loss of Employment         * Name of Employment       Name of Employment         * Name of Nam		e Reduction/Loss:			
	Legal Separation or Divorce AFTER Filing FAFSA       Date of Divorce/Separation         *Referring to the marital status of the student or the parents listed on FAFSA.       For Dependent Student		orced (circle one): PARENT OR STUDENT aration:// ents, which parent did you live with the most during the 12 months 			
	<b>Death of Parent or Spouse</b> <u>AFTER Filing FAFSA</u> *Parent must be a parent that was listed on FAFSA.		Name of Deceased:			
	Significant Medical Expenses Paid Out-Of-Pocket *This category includes nursing home expenses. *Must be paid out-of-pocket in and not reimbursed by insurance.		Who Paid the Medical Expenses:         Total paid out-of-pocket in 2022:         Total paid out-of-pocket in 2023:         Total paid out-of-pocket in 2024:			
	One-Time Income Distribution in 2022(ex. IRA or Pension Distribution) *Only check if the distribution/withdrawal was a <u>one-time event</u> that was used for hardship and the funds are <u>no longer available</u> .		What were the funds used for: Were additional funds withdrawn in 2023 or 2024: YES / NO			
	<ul> <li>Other Reason</li> <li>NOTE: The Special Circumstance process is not intended for:</li> <li>Non-essential expenses (vacation, tithing, high mortgage payments, second vehicles, etc.)</li> <li>Standard living expenses (utilities, cable bills, credit card payments, cell phone, etc.)</li> <li>Standard maintenance items (lawn care, home repair, gas, etc.)</li> <li>Any circumstance experienced by the parent not listed on FAFSA.</li> </ul>		Reason:			

## E. Projected 2024 Income and Resources (COMPLETE THE TABLE BELOW)

Estimated ANNUAL 2024 Taxable Income	Independent Students Complete these Columns		Dependent Students Complete these Columns	
Type of Income and Resource	<u>Student</u>	<u>Student's</u> Spouse (If <u>married)</u>	<u>Father/Step-</u> <u>Father</u>	<u>Mother/Step-</u> <u>Mother</u>
Income Earned from Work	\$			
Unemployment Compensation	\$			
Other Taxable Income (Ex. interest/dividend income, social security benefits, severance payments, rental income, alimony, IRA/401K withdrawals, etc.) Please specify:	Sindependent Students Complete these Columns			
Estimated ANNUAL 2024 Untaxed Income			Dependent Students Complete these Columns	
Type of Income and Resource	<u>Student</u>	<u>Student's</u> Spouse (If <u>married)</u>	<u>Father/Step-</u> <u>Father</u>	<u>Mother/Step-</u> <u>Mother</u>
Child Support received for all children	\$			
IRA deductions and payments to self-employed SEP, SIMPLE and Keogh	\$			
Payments to tax-deferred pension such as 401(K) or 403(B) plans and savings plans (paid directly or withheld from earnings)	\$			
Untaxed portions of pension distributions or withdrawals (excluding rollovers)	\$			
Living allowances paid to military, clergy and others. Include cash payments and cash value of benefits. Don't include the value of on-base military housing or the value of basic military allowance for housing.	\$			
Veteran non-education benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study Allowance	\$			
Other Untaxed Income not reported elsewhere on this form (Ex. worker's compensation, disability, etc.) Please specify:	\$			

### F. Certification and Signature(s) (Typed/Electronic signatures are NOT accepted)

By signing this form, we certify all the information is true and complete to the best of our knowledge. We agree to document the information reported on this form. We also realize that if unable to provide documentation when asked, the student for whom this form was filed may not receive aid. If dependent, at least one parent must sign this form.

**WARNING:** If you receive federal or state financial aid based on incorrect information, you will have to pay it back. If you purposely give false or misleading information on any financial form, you may be fined \$10,000, receive a prison sentence, or both.

Student Signature:	 Date:
Parent Signature:	 Date:

### G. Notices

It is the policy of the University of Southern Indiana to be in full compliance with all federal and state non-discrimination and equal opportunity laws, orders, and regulations relating to race, sex, religion, disability, age, national origin, sexual orientation, or status as a disabled veteran or veteran of the Vietnam era. Questions or concerns should be directed to the Affirmative Action Officer, USI Human Resources Department, University of Southern Indiana, 8600 University Boulevard, Evansville, Indiana 47712.