



2021-2022 Special Circumstance Request

Student's Name: _____ Student Id#: _____

Address: _____ City/State/Zip: _____

Phone: _____ Email: _____

The Financial Aid Office recognizes that many families have changes in income or family situations that cannot be reflected in the 2019 tax return. Therefore, it is possible for students to appeal their financial aid eligibility if they have unique financial circumstances. If selected for verification by the Department of Education, you must complete verification before submitting this request. Notification of the FAA's decision will be sent to your email address on file with the administrative office. All decisions are final and not appealable to the U.S. Department of Education.

A Special Circumstances Request may be filed if you or your family has extenuating circumstances, which you believe warrant a reevaluation of your financial aid. Circumstances may include:

- Significant loss income or change of employment since 2019
- Loss or change in untaxed income (child support, Social Security, or other benefits) since 2019
- Divorce or separation of parents or spouse that has taken place after 2021-2022 FAFSA was filed
- Death of parent(s) or spouse
- Unusual medical expenses (not covered by insurance) that you have already paid to the provider
- One-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments)

Circumstances that are NOT considered extenuating include, but are not limited to:

- Standard living expenses (e.g. utilities, credit card payments, children's allowances, etc.)
- Mortgage payments
- Car payments
- Credit card or other personal debts
- Vacation expenses
- All other discretionary expenses

If the student's Estimated Family Contribution (EFC) is already zero (0), the appeal will not be reviewed due to the fact that the student is already eligible for the maximum federal financial aid available. Exception: a budget increase request.

All requests should include Tax Return Transcripts for student, spouse (if married filing separately), and parent (if student is dependent) along with W-2's and/or 1099's used to complete the tax return. You may obtain a Tax Return Transcript by going on-line to the [IRS Website](#) or you may call the IRS at 1-800-908-9946 and follow the prompts to request your transcript. Special Circumstance Requests received after 11/1/21 will not be considered until a 2020 Tax Return Transcript and 2020 W-2's and/or 1099's have been submitted.

THIS REQUEST WILL NOT BE CONSIDERED WITHOUT THE REQUIRED SUPPORTING DOCUMENTATION. Failure to provide adequate documentation will result in your request being denied.

Allow 3 to 4 weeks for processing from the time a complete request package has been submitted. During peak times processing may take longer.

Submitted documentation will not be returned. Please do not submit originals. Submission of this form with your signature verifies that you have read the procedures above and below and that all your statements are true and accurate. **DO NOT EMAIL documents with Personally Identifiable Information (PII) (i.e. SSN, Full Name, Phone #, Address...), all documents should be uploaded to your student account in the HUHS Financial Aid portal or mailed to the University.**

Huntington University of Health Sciences
Attention: Financial Aid
118 Legacy View Way
Knoxville, TN 37918

Student's Name: _____ Student ID# _____

STEP ONE: CHECK APPROPRIATE REASON FOR YOUR REQUEST

_____ **Significant Loss of Income/Loss of employment for at least 4 months
(Student, Parent(s) Spouse)***

Required Documentation

- Special Circumstances Request form
- Verification Worksheet
- Signed/dated detailed letter explaining your circumstances
- 2019 Tax Return Transcript from [IRS website](#) for student, spouse (if married filing separately), and parents (if dependent). **Signed copies of 1040 are acceptable.**
- W-2's for student, spouse (if married filing separately), and parents (if dependent)
- Letter from former employer(s) stating the last date of employment
- Copy of unemployment compensation letter or signed statement that you did not or will not receive unemployment benefits.
- Copy of last paystub(s) from former employer(s) and current employer(s), if applicable.
- If this form is submitted after 11/1/2021, 2020 Tax Return Transcripts and W-2's should be submitted for student, spouse (if married filing separately), and parents (if dependent).
- Copy of DD214 if request is due to discharge from active military duty.

May Be Applicable

- Proof of severance package benefits
- Proof of pension income
- Proof of other income (1099, Roth IRA Statement)

*Requests involving self-employment, commission, tips, or other variable income will generally not be reviewed until the end of the calendar year due to the complexity of estimating annual income.

*Requests may also be delayed until the end of the calendar year if income is undeterminable, if the affected member is seeking employment and has obtained employment, or if your or your parents itemize deductions with a Schedule A on your tax returns.

_____ **Death of a parent or spouse (occurred after filing of FAFSA)**

Required Documentation

- Special Circumstances Request form
- Verification Worksheet
- Signed/dated detailed statement explaining circumstances
- 2019 Tax Return Transcript from [IRS website](#) for student, spouse (if married filing separately), and parents (if dependent). **Signed copies of 1040 are acceptable.**
- W-2's for student, spouse (if married filing separately), and parents (if dependent)
- Copy of death certificate.

Student's Name: _____ Student ID# _____

_____ **Loss of Untaxed Income** (social security, disability, child support, alimony, unemployment, etc.)

Required Documentation

- Special Circumstances Request form
- Verification Worksheet
- Signed/dated detailed letter explaining circumstances
- 2019 Tax Return Transcript from [IRS website](#) for student, spouse (if married filing separately), and parents (if dependent). **Signed copies of 1040 are acceptable.**
- W-2's for student, spouse (if married filing separately), and parents (if dependent)
- If benefit terminated, provide documentation of monthly benefit amount and date of benefit termination
- If benefits reduced, provide documentation of original amount, date of reduction and reduced amount

_____ **Separation/Divorce of Student or Parent** (occurred after filing of FAFSA)

Required Documentation

- Special Circumstances Request form
- Verification Worksheet
- Signed/dated detailed statement explaining circumstances, including income student/parent will receive in 2021 as result of divorce
- 2019 Tax Return Transcript from [IRS website](#) for student and parents (if dependent). **Signed copies of 1040 are acceptable.**
- W-2's for student and parents (if dependent)
- Copy of legal separation documentation
- Proof of separate households (utility bills, etc.)
- Copy of final divorce decree with attached settlement/mediation agreement

_____ **Unusual Out-of-Pocket Medical Expenses** (expenses NOT paid by insurance provider or source other than the student)

Required Documentation

- Special Circumstances Request form
- Verification Worksheet
- Signed/dated detailed letter explaining circumstances
- 2019 Tax Return Transcript from [IRS website](#) for student, spouse (if married filing separately), and parents (if dependent). **Signed copies of 1040 are acceptable.**
- W-2's for student, spouse (if married filing separately), and parents (if dependent)
- Copy of Schedule A from 2019 tax return to reflect itemization (if applicable)
- Statement from physician indicating out-of-pocket expenses and name of patient
- Proof of out-of-pocket payments (cancelled checks, credit card statement, receipts, etc.)
- Statement from pharmacy indicating amount paid for prescriptions and name of patient.

Student's Name: _____ Student ID# _____

_____ **One-time taxable income used for life changing event** (IRA, Pension distribution, etc.)

Required Documentation

- Special Circumstances Request form
- Verification Worksheet
- Signed/dated detailed letter explaining circumstances
- 2019 Tax Return Transcript from [IRS website](#) for student, spouse (if married filing separately), and parents (if dependent). **Signed copies of 1040 are acceptable.**
- W-2's for student, spouse (if married filing separately), and parents (if dependent)
- Documentation to identify source of the one-time taxable income
- Proof of payment and an itemized statement indicating how the funds were spent (cancelled check, receipts, bank statements, etc.)

_____ **Special Circumstances Not Listed**

- Submit Special Circumstances Request form
- Contact the HUHS Financial Aid Office

STEP TWO: SUBMIT REQUIRED DOCUMENTATION

Send all required document to Huntington University of Health Sciences, Attn: Financial Aid, 118 Legacy View Way, Knoxville, TN 37918 or contact the Financial Aid Office for information on uploading documents to the HUHS Financial Aid Portal. **DO NOT EMAIL documents with Personally Identifiable Information (PII) such as SSN, Full Name, Phone #, Address, etc.** Please note the following:

1. This request will not be considered until all required documentation has been received by the University.
2. Additional documentation may be requested prior to approval.
3. Failure to provide adequate documentation will result in your request being denied.
4. Allow 3 to 4 weeks for processing from the time a complete request package has been submitted. During peak times processing may take longer.
5. Submitted documentation will not be returned. Please do not submit originals.
6. After 2/28/22, no Special Circumstance Requests for 2021-2022 will be accepted.

STEP THREE: CERTIFICATION

I certify that the information provided on this form and all attached documents is true, complete, and accurate. I understand that purposefully providing false information could result in a reduction and/or repayment of aid, and/or denial of future appeals in this and future years. I also understand that the penalty for providing false information is a \$20,000 fine, a prison sentence, or both.

Student Signature: _____ Date _____

Parent/Spouse Signature: _____ Date _____
(if applicable)