

2023-2024 Academic Year

Special Circumstance Request for Independent Student - 2022 Tax Information

Student Name: _____

UO ID: _____

Our office understands there may be circumstances in which the information provided on the FAFSA does not always accurately reflect a family's current financial situation. Please complete this form if you would like our office to review your special circumstance for consideration of additional financial aid eligibility. Also keep in mind that changes in aid eligibility generally only pertain to the federal student aid programs (such as the Pell Grant and Subsidized Direct Loan), not institutional or state aid programs. Not all changes result in additional aid eligibility.

Check one box for each of the 3 required sections listed below and attach required documentation. Please submit all documentation at one time as incomplete submissions will delay processing time.

1. ☐ Attach a statement to this form that addresses why your 2022 income more accurately reflects your current financial situation, instead of your 2021 income that was already reported on the FAFSA (loss of employment, separation or divorce, death of a spouse, one-time source of income, other special circumstances).
2. ☐ Attach a **signed copy** of your (and spouse, if applicable) 2022 IRS 1040 tax form, including Schedules A & 1-3 (if filed) If not yet filed, please submit all documents together after filing your 2022 federal tax return with the IRS; or
☐ Copy of the your (and spouse, if applicable) 2022 W-2(s) if you worked in 2022 but will not file taxes; **or**
☐ Check here if you (and spouse, if applicable) had no income, will not file, and were not required to file a 2022 IRS Income Tax Return.
3. ☐ Use the table below to report your other 2022 income (and spouse, if applicable).

2022 Additional Financial Information (1/1/2022 – 12/31/2022) – <u>do not leave any box blank, if none please put 0</u>		
Untaxed Income	Student	Spouse
Payments to tax-deferred pension and retirement plan, such as 401k – often reported on W-2 forms in Boxes 12a-12d, codes D, E, F, G, H and S. Don't include code DD.	\$	\$
Child support received . Don't include foster care or adoption payments.	\$	\$
Housing, food and other living allowances paid to members of military, clergy, others.	\$	\$
Veterans noneducation benefits, such as Disability, Death Pension, etc.	\$	\$
Other untaxed income such as: worker's compensation, disability benefits (don't include untaxed Social Security or SSI), untaxed foreign income, etc.	\$	\$
Other nontaxable income, Source: _____	\$	\$
Additional Financial Info:		
Child support paid as a result of a legal requirement. Don't include support for children in your household as reported on the FAFSA.	\$	\$
Taxable earnings from need-based employment, such as Federal Work-Study	\$	\$

By signing this worksheet, you certify that all the information reported is complete and correct to the best of your knowledge. We may request additional documentation.

Typed or auto-generated electronic signatures NOT accepted.

Student Signature

Date

Spouse Signature

Date

**Warning: If you purposely
give false or misleading
information, you may be
fined, sent to prison, or both.**

Office of Student Financial Aid and Scholarships

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