



2019-2020 Independent Student Special Conditions Application OFFICE OF FINANCIAL AID

Financial aid for the 2019-2020 academic year is based on 2017 income. If you and/or your family have had a significant change in your financial situation during 2019, complete this form to request a re-evaluation of your eligibility for financial aid for the 2019-2020 academic year. This review will be based upon the information you provide through a process called Special Conditions. Circumstances which may result in the adjustment of your family contribution include:

- Loss of untaxed income or benefits in 2019 that was reported on the FAFSA application – for example, child support or worker’s compensation.
- Loss of one-time income received during 2017 which was included in adjusted gross income on the 2017 federal income tax return – for example, taxable Social Security, IRA or 401(k) withdrawals, capital gains or moving allowances.
- Loss of earnings in 2019 due to a loss of job, change of job, reduction in pay, disability, natural disaster or retirement. No adjustments will be made due to changes in overtime compensation.
- Loss of taxed income such as alimony.
- Financial support for elderly relatives – for example, nursing home costs.
- Payment of medical and dental expenses not covered by health insurance or pre-tax plans (such as a Flexible Spending Account), but paid by the student or spouse in 2018 or 2019. Expenses must have already been incurred and paid, not just owed. Certain limits apply.
- Death of spouse after Free Application for Federal Student Aid (FAFSA) is filed.

If you and your family meet one of the criteria listed above, or if you feel that you have another extenuating circumstance that we should consider, explain the situation on the back of this form and return it to Oserve along with the required documentation. Additional documentation could be requested. **It is important for you to turn in all requested documentation pertaining to your situation(s) as outlined in the boxes on this form.**

If you have any questions, please contact Oserve at (567) 661-7378 or 1-800-GO-OWENS, ext. 7378.

To check the status of your form:

1. Log into **Ozone** at ozone.owens.edu
2. On the **Financial Info** tab, verify in the Financial Aid Summary section that you are viewing the “Financial Aid Summary 2019-2020”, then click on **Student Requirements**.

The 2019-2020 Independent Student Special Conditions Application will be one of the items listed. Below is a listing of what each status means:

Received, not yet reviewed: Your materials have not been reviewed.

Incomplete: Information that is required for the processing of your form is missing. Please review your Active Messages on Ozone or contact Oserve.

Completed: Review of your form has been completed and approved.

Denied: An adjustment to your FAFSA information could not be made.



**2019-2020 Independent Student
Special Conditions Application**
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Student Name: _____ OCID: _____

Phone No. _____ Date of birth: _____

A. APPLICATION STEPS

Before you submit this application, make sure you have also reviewed and completed the following items.

- You have submitted the Free Application for Federal Student Aid (FAFSA) for 2019-2020. If you have not filed a FAFSA, **you must do so as soon as possible**. The Office of Financial Aid is unable to give consideration to your changed financial circumstance(s) until we have received the results of your FAFSA and you have completed verification.
- As part of the special conditions application, you (and your spouse, if applicable) will be selected for verification. Complete the following.
 - 2019-2020 Independent Student Household and Number in College Verification Form. This form is not required if your FAFSA only shows you (and your spouse, if applicable) in the household and you are the only student in college.
 - 2019-2020 Independent Student Statement Regarding Tax Returns, IRS data retrieval, or IRS tax transcript
 - Check the Student Requirements page on your Ozone account for a list of any additional documentation that is needed.
- You must currently be enrolled for Summer 2019, Fall 2019, or Spring 2020 semester(s). If you are not enrolled at the time we review the application, we will not make a decision on the application until you have enrolled at Owens.
- You are submitting this application by the semester deadline. **The deadline to submit this application and all requested documentation is one week prior to the last day of classes for the semester(s) you are attending. The semester deadlines are:**

Summer 2019: 8/4/2019 Fall 2019: 12/5/2019 Spring 2020: 5/7/2020
- You have completed the application and have attached all **required** documentation for the circumstance being considered. Failure to provide all **required** documentation will cause your application to be incomplete or be denied.

Special Conditions Required Documents

Examples of circumstances and the documentation **required** to process the special conditions are listed below. The required documentation for your request along with the special conditions application must be submitted to Oserve. Additional documentation could be requested.

Social Security Loss of benefits in 2019

- Copy of the Social Security termination letter
- Documentation that shows the amount of monthly benefit that was being received
- A signed copy of your (and if married, your spouse's) 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)

Child Support Loss of benefits in 2019

- Court or child services agency document stating the date of termination and a statement of the amount of monthly benefit that was being received

Worker's Compensation Loss of benefits in 2019

- Copy of the Worker's Compensation termination letter
- Documentation showing the amount of monthly benefit that was being received

One-time withdrawal from IRA, 401k or other pension programs 2017

- Documentation showing the source of the pension withdrawal
- Written explanation of why the funds were withdrawn
- A signed copy of your (and if married, your spouse's) 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)

Loss of Job in 2019

For the person whose job was lost:

- Copy of your last pay stub showing year-to-date income
- A letter from **each** of your prior employer(s) stating the last date of employment
- Copy of your unemployment eligibility determination notice, no older than 90 days from the date of issuance, stating the status of your unemployment benefits if you were eligible. Also include a copy of any extended unemployment benefits statements, if applicable
- Written statement confirming that you are still unemployed
- Copy of your (and if married, your spouse's) 2017 W-2 form(s)
- A signed copy of your (and if married, your spouse's) 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)

Change in job or reduction in pay in 2019

For the person who has a change in job or reduction in pay:

- Copy of your last pay stub showing year-to-date income
- A letter from **each** of your prior employer(s) stating the last date of employment
- Copy of your most recent pay stub from your current job showing year-to-date income for 2019
- A letter from your current employer stating your date of hire, hourly rate, and average hours worked during each pay period
- Copy of your (and if married, your spouse's) 2017 W-2 form(s)
- A signed copy of your (and if married, your spouse's) 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)

Disability Loss of earnings in 2019

For the person who has a loss of earnings due to a disability:

- A letter from a doctor confirming the disability and the prognosis for returning to work
- A letter from Social Security or an insurance agency stating the amount of monthly disability benefits you will receive
- Copy of your last pay stub showing year-to-date earnings
- Copy of your (and if married, your spouse's) 2017 W-2 form(s)
- A signed copy of your (and if married, your spouse's) 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)

Alimony Loss of income

- Copy of court documents stating the amount of the monthly alimony payments and the termination date of the alimony payments
- A signed copy of your (and if married, your spouse's) 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)

Nursing home costs associated with dependent elderly relatives in 2018 or 2019

- A statement from the nursing home administrator stating the amount you paid in 2018 or 2019

Medical or dental expenses not covered by health insurance but paid by the student or spouse in 2018 or 2019

- Copies of medical bills **and** cancelled checks documenting payment made by you in 2018 or 2019 that were not covered by health insurance or a copy of your 2018 federal tax return Schedule A. Only include costs not paid through a pre-tax plan (such as a Flexible Spending Account.) Certain limits apply.

Death of a spouse after the FAFSA has been submitted

- A copy of the death certificate
- Copies of your and your spouse's 2017 W-2 form(s)
- A signed copy of your 2017 Federal income tax return or a copy of the IRS Tax Return Transcript (must be submitted even if the tax transcript requirement is waived on Ozone)