

# Special Circumstance Request

## 2022-2023



### Step 1: Identification of Special Circumstances and Request a Review

Review the categories listed below to determine if you may be eligible to submit a request. Contact the Office of Financial Aid to request a review. Email: [finaid@bju.edu](mailto:finaid@bju.edu) Phone: (864) 241-1637

### Step 2: Review Process:

Once your initial special circumstance review application has been confirmed, you will receive email instructions for creating an account and completing all required tasks. (*NOTE: FAFSA verification must be completed first, if not already performed, prior to us starting work on your special review request.*) BJU E-Verification allows you to complete verification and the special circumstance review process from your electronic device.

Special Circumstance	Explanation	Documentation that may be required
<b>Loss of Income–non-disability related unemployment</b>	Student, spouse or parent(s) has lost employment (due to layoff, cut in pay or voluntary resignation) since the last tax year reported on the most recent FAFSA.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Copies of 2020 &amp; 2021 Federal Tax Returns and all W-2's for student, spouse (if applicable) and parent(s) whose information was required on the FAFSA</li> <li>• If self-employed, signed statement of earnings for 2021</li> <li>• Documentation of loss of employment (to include any severance package/letter from employer on company letterhead)</li> <li>• Copy of unemployment check(s) and/or last pay stubs (or letter stating that unemployment was denied)</li> <li>• Last two paystubs from former employer</li> </ul>
<b>Loss of Income due to disability</b>	Student, spouse or parent(s) has not been able to earn money the way it was earned during the last tax year reported on the most recent FAFSA.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Copies of 2020 &amp; 2021 Federal Tax Returns and all W-2's for student, spouse (if applicable) and parent(s) whose information was required on the FAFSA</li> <li>• If self-employed, signed statement of earnings for 2021</li> <li>• Documentation of loss of earnings (such as letter from employer on company letterhead)</li> <li>• Copies of Approval/Denial letters for disability</li> </ul>
<b>Loss of untaxed income or benefits</b>	Student, spouse or parent(s) has lost untaxed earnings (such as child support, Worker's Compensation, military or clergy housing allowance) since the last tax year reported on the most recent FAFSA.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Copies of all 2021 W-2's for student, spouse (if applicable) and parent(s) whose information was required on the FAFSA</li> <li>• If self-employed, signed statement of earnings for 2021</li> <li>• Documentation of loss of untaxed income or benefits (court decisions, letters of denial of benefits, etc.)</li> </ul>

Special Circumstance	Explanation	Documentation that may be required
<b>Occurrence of one-time income</b>	Student, spouse or parent(s) received a one-time lump sum (such as inheritance, retirement, IRA distribution, etc.) that was reported on the most recent FAFSA, but not expected in the future.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• 2020 &amp; 2021 IRS Tax Return Transcripts</li> <li>• Copies of all 2020 &amp; 2021 W-2's for parent(s)</li> <li>• Documentation of the one-time income (legal forms, financial statements, etc.)</li> <li>• Documentation supporting how the funds were spent or invested</li> </ul>
<b>Separation or Divorce</b>	Student (or your parents, if dependent) have separated or become divorced since the time the most recent FAFSA was filed.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Copies of all 2020 W-2's of parent student is living with</li> <li>• If self-employed, signed statement of earnings for 2020</li> <li>• Legal documentation of separation or divorce (such as a court decision or divorce decree)</li> </ul>
<b>Death</b>	Your parent (or spouse) received income for most of the recently reported tax year, but passed away after you completed the most recent FAFSA.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Copies of all 2020 W-2's of surviving parent</li> <li>• If self-employed, signed statement of earnings for 2020</li> <li>• Legal document such as a death certificate</li> </ul>
<b>Elementary or secondary school tuition costs for siblings or children (if independent)</b>	You or your parents are paying private K5–12 school tuition costs for the upcoming school year for other dependent children.	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Official statement of tuition paid or due for the 2022–2023 academic year. OR</li> <li>• Signed letter from the school on school letterhead stating the amount of tuition paid or due for the 2022–2023 academic year.</li> </ul>
<b>Medical and/or dental expenses (If paid expenses exceed 11% of Adjusted Gross Income in 2020)</b>	You or your parents paid medical or dental expenses not covered by insurance during the most recent tax year (2020 or 2021).	<ul style="list-style-type: none"> <li>• Detailed letter explaining special circumstance</li> <li>• Proof of payment of out-of-pocket medical or dental expenses, including premiums paid in 2020 or 2021</li> <li>• Confirmation of amount paid out-of-pocket by you in 2020 or 2021 (amounts billed must be confirmed by proof of payment)</li> </ul>