



2024-2025 INDEPENDENT STUDENT SPECIAL CONDITIONS REVIEW FORM

Student's Name: _____ Warrior ID Number: _____

The Special Conditions Review Form is used to report changes in circumstances that occur after filing the Free Application for Federal Student Aid (FAFSA) or to report circumstances that affect the family's ability to contribute toward college costs. The WSU Student Financial Aid Office reviews information reported to determine whether changes can be made. Check the condition(s) that apply to you and provide all requested documentation and applicable signatures.

CHANGE IN INCOME

UNEMPLOYED (If you were employed in 2022 and have become unemployed in 2023 or 2024). The Financial Aid Office will be recalculating 12 months of income from the date of unemployment and entering this information on the FAFSA. Please provide enough documentation for us to justify the special conditions and to recalculate income as accurately as possible. Lack of documentation will result in either a delay in processing or denial of special condition.

- Please wait either 90 days from date of unemployment, or until you start a new job, whichever comes first before completing this form.
- Attach a written statement indicating the date and reason you became unemployed.
- Attach a copy of your most recent paystub(s) and W2s from all employers.
- Attach a copy of unemployment benefits you will receive from your state job service office.
- Attach a copy of any severance pay that was or will be received.
- Attach documentation for any other taxable income, such as money withdrawn from a retirement account (IRA, annuity, or pension), taxable social security, capital gains, inheritance, or gambling winnings.

REDUCTION IN EARNINGS OR LOSS OF OTHER INCOME

2023 or 2024 income is less than 2022 income listed on the FAFSA. This could include a reduction in earnings, loss of taxable social security benefits, one time withdrawal from a retirement account, etc. Please provide enough documentation for the Financial Aid Office to justify the special conditions and to recalculate your income as accurately as possible. Lack of documentation will result in either a delay in processing or denial of special conditions.

- Attach a written statement outlining the amount of income lost or reduced, the date the change became effective, and the reason for the loss of income.
- Attach documentation proving the loss or reduction in income (by a third party if possible). This might be a 2023 IRS tax transcript or a signed 2023 federal tax return, last paycheck stubs, a statement from social security, bank statements, letter from the court, etc.

CHANGE IN HOUSEHOLD SIZE THAT OCCURRED AFTER FILING YOUR FAFSA

DIVORCE OR SEPARATION

If you have already applied for financial aid, and since that time you and your spouse have gotten separated or divorced:

- Attach a copy of the divorce decree or proof of separation (court order, statement from attorney or clergy).
- Provide a statement containing the names, ages, and the relationship to you of the family members you will support through June 30, 2025.
- Attach a copy of your 2022 IRS tax transcript or a signed copy of your 2022 federal tax return with all applicable schedules **and** 2022 W2s.

DEATH OF SPOUSE

- Please provide a written statement indicating your spouse's name and date of death.
- Attach a copy of your 2022 IRS tax transcript or a signed copy of your 2022 federal tax return with all applicable schedules **and** 2022 W2s.

MEDICAL AND DENTAL EXPENSES

UNUSUALLY HIGH MEDICAL AND DENTAL EXPENSES NOT REIMBURSED OR COVERED BY INSURANCE

The FAFSA calculation takes into account a certain percentage of your income going towards paying medical expenses. When expenses paid exceed this percentage, the Financial Aid Office may be able to make changes to your FAFSA to account for the additional out of pocket expense. We will need third party documentation showing payments made to make any adjustments to your FAFSA. We are unable to take into account unpaid medical expenses. Lack of documentation will result in either a delay in processing or a denial of the special conditions.

- Attach a signed statement itemizing out of pocket medical or dental expenses you paid in either 2022 or 2023. These expenses should not include amounts covered by insurance, company health plans, self-employed health deductions, or insurance premiums.
- Attach documentation such as provider statements, pharmacy statements, cancelled checks, or paid receipts. Most medical facilities and pharmacies are able to provide you with annual statements of accounts.
- Attach a copy of your 2022 IRS tax transcript or a signed copy of your 2022 federal tax return with all applicable schedules.
- Attach a copy of your 2023 IRS tax transcript or signed copy of your 2023 federal tax return if you are providing documentation of medical expenses paid in 2023.

EDUCATIONAL EXPENSES

COST OF ATTENDANCE ADJUSTMENT

The standard cost of attendance reflects the average cost of tuition, fees, laptop, housing, meals, books and supplies, transportation, personal expenses, and loan fees. Only additional educational expenses that occur during the academic year and substantially exceed those allowed in the standard budget are considered. Receipts or purchase invoices are required.

Examples of expenses that may be considered are: increased tuition costs, course materials in excess of allowance, costs associated with a disability not covered by insurance or another agency, or cost of first professional credential.

OTHER UNUSUAL CIRCUMSTANCE

- Attach a signed statement summarizing any other unusual circumstances you want the Financial Aid Office to take into consideration. Please provide applicable documentation (by a third party if possible) to support your unusual circumstance.

The name of the Financial Aid Counselor I talked with about my special conditions review was _____.

I certify the information contained in this appeal, including any supporting documentation, is accurate and true to the extent of my knowledge and belief.

_____ Student Signature	_____ Date	_____ Signature of Applicable Spouse	_____ Date
Phone number: _____		Email: _____	

Please return form and supporting documentation to: Winona State University, Financial Aid Office
PO Box 5838
Winona, MN 55987
or fax: (507) 457-5628.