

**BridgeValley Community and Technical College**  
**Financial Aid Office**  
**2023-2024 Special Circumstance Request**

BridgeValley Community and Technical College realizes families may experience unforeseen circumstances and/or expenses during an academic year. Use this form to address these unusual circumstances or expenses.

The U.S. Department of Education allows financial aid offices to adjust certain income and data items on your FAFSA in cases where your financial situation may have changed. This is called “professional judgement”. These situations are called “Special Circumstances” and may include one of the following:

- A reduction in income due to changes in employment from last year to this year
- Change in marital status due to divorce or separation
- Death of a primary wage earner
- Excessive medical/dental expenses not covered by insurance
- Unusual debts (other than discretionary purchases)
- Private school tuition expenses for elementary or secondary education

**Student Information:**

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Student’s Last Name	First Name	M.I.	Student’s ID Number (B#)
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Student’s Street Address (include apt. no.)	City	State	Zip Code
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Student’s Email Address	Student’s Home Phone Number
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**Individual(s) with special circumstance(s), check as appropriate:**

\_\_\_\_ Father/Stepfather

\_\_\_\_ Mother/Stepmother

\_\_\_\_ Student

\_\_\_\_ Student’s Spouse

**SECTION A:**

Check the box for the situation that best represents your special circumstance. You must provide documentation for each item listed in the Required Information box to the right of the box you check.

<p>____ <b>Loss of Employment or Funding</b></p> <ul style="list-style-type: none"> <li>• <b>Recent Unemployment</b></li> <li>• <b>Unemployment Benefits End</b></li> <li>• <b>Social Security Benefits End</b></li> <li>• <b>Child Support Payments End</b></li> <li>• <b>Other</b></li> </ul>	<p>Required Information:</p> <ol style="list-style-type: none"> <li>1. Letter of explanation of circumstances from student/parent</li> <li>2. Last date of pay    /    /</li> <li>3. Signed 2021 Federal Tax Return Transcript from the IRS</li> <li>4. Copy of last paycheck stub, or statement with year-to-date earnings</li> </ol>
<p>____ <b>Reduction or Loss of Income</b></p> <ul style="list-style-type: none"> <li>• <b>Change of Employer</b></li> <li>• <b>Change to income or assets</b></li> <li>• <b>Non-Reoccurring Income</b></li> </ul>	<p>Required Information:</p> <ol style="list-style-type: none"> <li>1. Letter of explanation of circumstances from student/parent</li> <li>2. Last date of receipt of benefit/income    /    /</li> <li>3. Signed 2021 Federal Tax Return Transcript from the IRS</li> <li>4. Copy of last paycheck stub, with year-to-date earnings</li> </ol>
<p>____ <b>Change in Household Size</b></p> <ul style="list-style-type: none"> <li>• <b>Separation</b></li> <li>• <b>Divorce</b></li> <li>• <b>Death of Wage Earner</b></li> </ul>	<p>Required Information:</p> <ol style="list-style-type: none"> <li>1. Letter of explanation of circumstances from student/parent</li> <li>2. Date of separation/divorce/Death    /    /</li> <li>3. Signed 2021 Federal Tax Return Transcript from the IRS</li> <li>4. Divorce Decree, Legal Separation Agreement, or Death Certificate</li> </ol>
<p>____ <b>Excessive Medical/Dental Expenses Not Covered By Insurance</b></p> <ul style="list-style-type: none"> <li>• <b>Must Exceed 11% of Adjusted Gross Income</b></li> </ul>	<p>Required Information:</p> <ol style="list-style-type: none"> <li>1. Letter of explanation of circumstances from student/parent</li> <li>2. Date expenses occurred    /    /</li> <li>3. Copies of medical/dental bills and documentation confirming that payment arrangements have been made</li> </ol>
<p>____ <b>Unusual Debts</b> <b>(other than discretionary purchases)</b></p>	<p>Required Information:</p> <ol style="list-style-type: none"> <li>1. Letter of explanation of circumstances from student/parent</li> <li>2. Date expenses occurred    /    /</li> <li>3. Copies of bills and documentation confirming that payment arrangements have been made</li> </ol>
<p>____ <b>Private School Tuition Expenses for Elementary/Secondary Education</b></p>	<p>Required Information:</p> <ol style="list-style-type: none"> <li>1. Letter of explanation of circumstances from student/parent</li> <li>2. Date expenses occurred    /    /</li> <li>3. Copies of bills and documentation confirming that payment arrangements have been made</li> </ol>

**SECTION B:**

**INSTRUCTIONS:** Complete using ALL expected income from **January 1, 2023 to December 31, 2023** of the person(s) with the special circumstance(s). You must submit documentation of ALL expected income. If filing this form for separation or death of a parent, use only your custodial parent's income.

<b>2023 Taxed Income</b>	<b>Father</b>	<b>Mother</b>	<b>Student</b>	<b>Spouse</b>
Income Earned from Work	\$	\$	\$	\$
Unemployment Benefits	\$	\$	\$	\$
Business or Farm Income	\$	\$	\$	\$
Pensions & Annuities	\$	\$	\$	\$
Taxed Interest/Dividend Income	\$	\$	\$	\$
Taxed Social Security Benefits	\$	\$	\$	\$
Other Taxed Income (pensions, alimony, rentals, etc.)	\$	\$	\$	\$
<b>Total 2023 Taxed Income</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>2023 Untaxed Income</b>	<b>Father</b>	<b>Mother</b>	<b>Student</b>	<b>Spouse</b>
Child Support Received	\$	\$	\$	\$
Untaxed Social Security Benefits	\$	\$	\$	\$
Workers Compensation	\$	\$	\$	\$
Welfare Benefits/TANF	\$	\$	\$	\$
Untaxed Portions of Pensions	\$	\$	\$	\$
Veterans Non-Education Benefits	\$	\$	\$	\$
Tax-Deferred Pension Payments	\$	\$	\$	\$
Deductible IRA/Keogh Payments	\$	\$	\$	\$
Tax Exempt Interest Income	\$	\$	\$	\$
Foreign Income Exclusions	\$	\$	\$	\$
Living Allowance for Clergy/Members of the Military	\$	\$	\$	\$
Any Other Untaxed Income	\$	\$	\$	\$
<b>Total 2023 Untaxed Income</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

**SECTION C:**

In order to document how the household was maintained in 2023, please complete this form as accurately as possible for the household in which you currently reside. Do not leave any fields blank.

**Current Expenditures:**

1. What is the monthly cost of housing (rent, mortgage)? \_\_\_\_\_

From what income source is this paid? \_\_\_\_\_

If your household did not have this expense, explain why \_\_\_\_\_

**Independent Students:** Is your name on the lease or mortgage?  Yes  No

2. What is the monthly cost of utilities (electric, gas, water, phone, cable)? \_\_\_\_\_

From what income source is this paid? \_\_\_\_\_

If your household did not have this expense, explain why \_\_\_\_\_

**Independent Students:** Are the utilities in your name?  Yes  No

3. What is the monthly cost of food? \_\_\_\_\_

From what income source is this paid? \_\_\_\_\_

If your household did not have this expense, explain why \_\_\_\_\_

4. What is the monthly cost of car payments/insurance and transportation costs? \_\_\_\_\_

From what income source is this paid? \_\_\_\_\_

If your household did not have this expense, explain why \_\_\_\_\_

5. What is the monthly cost of clothing, personal needs, and misc.? \_\_\_\_\_

From what income source is this paid? \_\_\_\_\_

6. What is the monthly cost of medical expenses and/or health insurance? \_\_\_\_\_

From what income source is this paid? \_\_\_\_\_

**Resources:**

List any cash support you (the student) received/will receive or money that has been/will be paid on your behalf during the 2023 year, which was not included in Section B of this form. Include the source of that income.

Example: \$ 1000 from Parents, monetary gift

\$ \_\_\_\_\_ from \_\_\_\_\_

\$ \_\_\_\_\_ from \_\_\_\_\_

**By signing, I agree that the information provided is true and complete to the best of my knowledge. If requested, I agree to provide additional documentation. I further agree to notify the BridgeValley Community and Technical College Financial Aid Office of any error or omission in the above information, or of any further circumstances which affect the accuracy of the provided information. I understand failure to comply with this agreement could result in forfeiture of financial aid eligibility of the student.**

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent/Student's Spouse's Signature

\_\_\_\_\_  
Date

BridgeValley Community and Technical College  
2001 Union Carbide Drive South Charleston, WV 25303  
Telephone: 304-205-6600 \* Fax: 304-734-6630  
Email: [finaid@bridgevalley.edu](mailto:finaid@bridgevalley.edu)

**BridgeValley Community and Technical College**  
**Financial Aid Office**  
**2023-2024 Verification Worksheet**

Your 2023-2024 Free Application for Federal Student Aid (FAFSA) has been selected for review in a process called verification. The law requires our office to confirm the information you and your parents (if you are a dependent student) reported on your FAFSA prior to awarding Federal Student Aid. To verify you provided accurate information, we will compare your FAFSA with the information on this worksheet and any other required documents. If discrepancies are found during this process, your FAFSA may need to be corrected. You must complete and sign this worksheet, attach any required documentation, and submit to the Financial Aid Office. If you are a dependent student, at least one parent must sign this worksheet. Based on your answers on this worksheet, we may ask for additional information. If you have questions about verification, contact our office as soon as possible to avoid delays with your financial aid.

**A. Student Information**

Student's Last Name	Student's First Name	Student's M.I.	Student's ID Number (B#)
Student's Street Address (include apt. no.)			City                  State          Zip Code
Student's Email Address			Student's Home Phone Number

**B. Household Information**

**Dependent Student's Family Information from July 1, 2023-June 30, 2024**

List below the people in your parent's household including yourself, parents (including stepparent), siblings, etc., even if everyone does not live in one house. List only those that your parents supply more than half of their support or if the other children would be required to supply parent information if they were completing a 2023-2024 FAFSA. Also, indicate any household member (not including parents) that will be attending a college/university.

**Independent Student's Family Information from July1, 2023-June 30, 2024**

List below the people in your household including yourself, spouse, children, etc., even if not everyone lives in one house. List only those that you and/or your spouse supply more than half of their support. Also, indicate any household member that will be attending a college/university.

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time?
		Student	BridgeValley CTC	

Signing this form certifies all information reported on both pages is complete and correct. The student and at least one parent (of a dependent student) must sign and date this form.

Student Signature	Date	Parent Signature	Date
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Warning: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

BridgeValley CTC – Financial Aid Office: 2001 Union Carbide Drive South Charleston, WV 25303 FAX: (304) 734-6630  
[finaid@bridgevalley.edu](mailto:finaid@bridgevalley.edu) : In order to ensure that your documents are securely transmitted to us, if emailing forms, please password protect your document attachments and provide us with your password in a separate email.  
 Instructions for encrypting an attachment are available at [www.bridgevalley.edu/verification](http://www.bridgevalley.edu/verification)

Student Name: \_\_\_\_\_

Student ID #  B  \_\_\_\_\_

**C. Student Income Information**

Check ONE option below that applies to you (the student).

<input type="checkbox"/>	I used or will use the <b>IRS DRT</b> within the FAFSA on the Web to transfer 2021 IRS income tax return information into my FAFSA. Note: The Financial Aid Office processes Verification when your transferred data is on file.								
<input type="checkbox"/>	I attached my (and my spouse's) <b>2021 IRS Tax Return Transcript or a signed copy of my 2021 federal tax return and applicable schedules.</b> Note: The Financial Aid Office processes Verification when your tax transcript(s) is on file.								
<input type="checkbox"/>	I was not employed (nor my spouse), had no income earned from work in 2021 AND did not file a 2021 tax return. Independent students must provide an <b>IRS Verification of Non-Filing Letter for 2021</b> , dated on or after October 1, 2022. Note: The Financial Aid Office processes Verification when your non-filing letter(s) is on file.								
<input type="checkbox"/>	I was employed (or my spouse) in 2021 but was NOT required to file a tax return. <u>Independent</u> students must provide an <b>IRS Verification of Non-Filing Letter for 2021</b> dated on or after October 1, 2022. Complete the chart below (DO NOT ESTIMATE) and attach copies of all 2021 W-2s and earning statements.								
	<table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 50%; text-align: center;">Employer</th> <th style="width: 50%; text-align: center;">Amount Earned</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Employer	Amount Earned						
Employer	Amount Earned								

**D. Parent Income Information (for Dependent Students Only)**

Check ONE option below that applies to the parent(s) listed on page 1 of this form and the 2023-2024 FAFSA

<input type="checkbox"/>	My parent(s) used or will use the <b>IRS DRT</b> within FAFSA on the Web to transfer 2021 IRS income tax return information into my FAFSA. Note: The Financial Aid Office processes Verification when your parent(s) transferred data is on file.								
<input type="checkbox"/>	My parent(s) attached their <b>2021 IRS Tax Return Transcript or a signed copy of my parent(s) 2021 federal tax return and applicable schedules.</b> Note: The Financial Aid Office processes Verification when your parent(s) tax transcript(s) is on file.								
<input type="checkbox"/>	My parent(s) was/were not employed, had no income earned from work in 2021 AND was/were not required to file a 2021 tax return. My parent(s) attached their <b>IRS Verification of Non-Filing Letter for 2021</b> , dated on or after October 1, 2022 or requested the letter from the IRS, and I will submit the form upon receipt. Note: The Financial Aid Office processes Verification when your parent(s) non-filing letter(s) is on file.								
<input type="checkbox"/>	My parent(s) was/were employed in 2021 but was/were NOT required to file a tax return. My parent(s) attached their <b>IRS Verification of Non-Filing Letter for 2021</b> , dated on or after October 1, 2022 or requested the letter from the IRS, and I will submit the form upon receipt. Complete the chart below (DO NOT ESTIMATE) and attach copies of all 2021 W-2s and earning statements.								
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Employer	Amount Earned								

**If an Independent Student or Parents of a Dependent Student did NOT file a 2021 Tax Return, they must provide a Verification of Non-Filing Letter from the IRS for 2020.** Independent students who are married, if their spouse did not file a 2021 tax return they must also provide a Verification of Non-Filing Letter from the IRS for their spouse. You obtain a Verification of Non-Filing Letter by using the IRS Form 4506-T (be sure to check box on line 7) or by using the Get Transcript Online option. If you are unable to obtain verification of non-filing from the IRS and you have waited the 15 business days for a response from the IRS, you must document the attempt and contact us for a special statement to sign.