**Morningside University**

**Office of Student Financial Planning**

**Special Circumstances (Professional Judgement)**

**Appeal for Independent/Self Supporting Status**

**2023-2024**

Lewis Hall, Room 203

1501 Morningside Avenue

Sioux City, IA 51106

Phone: 712-274-5159

Submit Documents by:

\*Fax: 712-274-5605

\*Student’s CampusWEB, My Financial Aid,

Forms, Secure Link

**Student Information**

Name (First, Middle Initial, & Last) Morningside ID# Email

Permanent Address Mobile Phone Number

City, State, Zip Home Phone Number

Please review the following information. If you have a special circumstance that fits one or more of these items, **please submit an explanation to our office in writing**. The explanation can be submitted to our office by mail; fax; or student’s CampusWEB, My Financial Aid, Forms, scroll to the bottom for secure link (see above).

If we have received your 2023-2024 FAFSA information, we will evaluate your explanation of special circumstances, your documentation, along with your FAFSA information. We will notify you if additional documentation is needed. Our ability to provide additional assistance will be determined by when you inform us of your special circumstances, how much this change impacts your financial need, and whether funds are available at the time you provide the information. There is no guarantee that an appeal will result in an adjustment to your financial aid.

**Situations that may be considered for Special Circumstances:**

* Student is self-supporting and/or has special family circumstances.
  + Letter should explain your family situation, including how you support yourself, where you live, whom you live with, and the date the situation occurred.
  + Three letters of documentation from third parties (counselors, clergy, one family member, etc.) who are familiar with the situation.
* Student experiencing a 25% reduction in income:
  + 2022 or 202# due to COVID-19
  + from 2021 to 2022 or from 2022 to 2023 because of unemployment or reduced wages

Explain the change(s) in income and the dates the change(s) occurred. Please include other pertinent documentation. Examples include: letter from employer documenting termination, unemployment compensation, severance documentation, current check stub(s) for you (and if applicable, spouse), etc.

* Student paid out-of-pocket medical expenses and/or Health Insurance Premiums in 2020 and/or 2021. Explain the medical situation and provide proof of out of pocket expenses.
* Student loss of untaxed income (child support, worker’s compensation, unemployment compensation, retirement benefits, etc.) in 2022 and/or 2023. Include documentation from provider indicating reduction, effective date(s), and pertinent amount(s).
* Student Divorce or Separation. If a divorce or separation occurred after the 2023-2024 FAFSA was filed and the original marital status was reported as married on the FAFSA. Provide the date of the separation/divorce and provide the residing address for both student and/or spouse if independent.
* Death of a Spouse. Please provide the date of death.

**All requests for Special Circumstances must be accompanied with the following documentation:**

* W-2s from 2021 & 2022 for Student (and if applicable spouse)
* Signed 1040 Federal Tax Return with Schedules A, 1, 2, & 3 for 2021 & 2022 for student (& if applicable spouse):
* Verification Worksheet:
  + <https://www.morningside.edu/assets/uploads/2023-2024V1StandardIndependentVerificationForm.docx>
* Current check stubs for all jobs in 2022 or 2023 for student.