



2012-13 INDEPENDENT STUDENT SPECIAL CIRCUMSTANCE EVALUATION FORM

Student's Name: _____
Last First

PSU ID _____

Reason Issued: Independent Student/Spouse unemployed (not retired) during 2012
 Independent Student/Spouse loss/reduction of income during 2012
 Independent Student/Spouse loss of 2012 benefits or untaxed income
 Death of spouse
 Independent Student/Spouse loss of 2012 income for academic pursuit
 Other: _____

Issued By: _____
 Date Issued: ____/____/____
 Original EFC: _____
 AFJP (SCEF)

INSTRUCTIONS: (Use ONLY black ink on this form)

- 1) Provide copies of the following, if applicable:
 - 2011 Federal Income Tax Return for you and your spouse. Each return **must** be signed by the filer.
 - 2011 W-2 forms for you and your spouse.
 - Schedules C, C-EZ for you and your spouse.
Note: If there is an amount listed on Line 12 of Federal Income Tax Return Form 1040, you must also address the business income/loss in your statement.
 - Schedule F for you and your spouse.
Note: If there is an amount listed on Line 18 of Federal Income Tax Return Form 1040, you must also address the business income/loss in your statement.
 - Schedule K 1-Form 1065 for you and your spouse.
Note: If there is an amount listed on Line 17 of Federal Income Tax Return Form 1040, you must also address the business income/loss in your statement.
 - Last paystub for all jobs (for both student and spouse if married), Unemployment financial determination forms, severance pay notification letter, employer letter detailing job/wage changes, documentation of changes to child support orders, and any other supporting documentation.
- 2) Provide a statement in Section 1 (Page 2 of 3) that explains **all** the details of the changes in your family situation. You must sign all additional statements if more space is needed.
- 3) 2012 estimates provided on this form are for the entire calendar year, **January 1 through December 31, 2012.**
- 4) Include your PSU Student Identification number on each page of your documentation.
- 5) If the answer to any item in Section 3 (Page 3 of 3) is zero, you must list a \$0. **Do not leave items blank.** This form will be returned to you for completion if any line is blank.
- 6) If you were issued this form after October 1, 2012, in addition to copies of your 2011 Federal Income Tax Return and W-2's, you must submit a signed copy of your 2012 Federal Income Tax Return. If you were not required to file a 2012 Federal Income Tax Return, you must submit copies of any 2012 W-2 forms issued to you and your spouse.

SECTION 1 – Explanation of unusual circumstance. This section must be completed.

In the space below, provide a statement that explains all the details of the changes in your family situation

Date (month/day/year) change in circumstance occurred: _____

The circumstance causing this change: _____

How have these changes affected or how will they affect your financial situation for the calendar year 2012? _____

How will your family support itself in calendar year 2012? _____

You must sign all additional statements, if more space is needed

SECTION 2 – Please complete ALL questions if marked.

Student/Spouse

1. Household size: _____

2. Other: _____

3. Other: _____

SECTION 3 – Please complete ALL questions for the calendar year 2012 (January 1 through December 31, 2012).

Student Taxable Income: If answer is Zero, you must list \$0 – Do not leave items blank

	2011 Reported	2012 Estimate
1 Student Wages, salaries, tips (Do NOT include unemployment compensation)	\$ _____	\$ _____
2 Student Business and/or Farm Income		
3 Spouse Wages, salaries, tips (Do NOT include unemployment compensation)	\$ _____	\$ _____
4 Spouse Business and/or Farm Income		
5 Interest Income and Dividends		\$ _____
6 Alimony Received		\$ _____
7 Capital & Other Gains		\$ _____
8 IRA distributions, Pensions and Annuities		\$ _____
9 Rental real estate, royalties, partnerships, S corporations, trusts		\$ _____
10 Total Unemployment Compensation (taxed and untaxed)		\$ _____
11 Taxable Social Security Benefits		\$ _____
12 Severance Pay		\$ _____
13 Other Taxable Income		\$ _____

Student Additional Financial Information: If answer is Zero, you must list \$0 – Do not leave items blank

*** Any changes from actual 2011 reported information to 2012 estimated information must be thoroughly explained in SECTION 1 ***

	2011 Reported	2012 Estimate
14. Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S.....	\$ _____	\$ _____
15. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans	\$ _____	\$ _____
16. Child Support RECEIVED for all children. (Do not include foster care or adoption payments) ...	\$ _____	\$ _____
17. Tax exempt interest income	\$ _____	\$ _____
18. Untaxed portions of IRA distributions, excluding rollovers	\$ _____	\$ _____
19. Untaxed portions of pensions, excluding rollovers	\$ _____	\$ _____
20. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or a basic military allowance for housing.	\$ _____	\$ _____
21. Veterans non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Education Work-Study allowances	\$ _____	\$ _____
22. Other untaxed income or benefits not reported elsewhere in SECTION 3, such as: (*For purposes of this form, these benefits are considered untaxed income)		
Worker's Compensation.....	\$ _____	\$ _____
Disability.....	\$ _____	\$ _____
First-time Homebuyer's Credit	\$ _____	\$ _____
Other: _____ (Do not include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.....	\$ _____	\$ _____

SECTION 4 – Signature Required

By signing this document, I certify that all the information reported on this document is true and complete to the best of my knowledge. If I purposely give false or misleading information on this document, it will be cause for denial or repayment of student aid and I may be fined, be sentenced to prison, or both.

Student Signature Date