



2023-2024 SPECIAL CIRCUMSTANCES WORKSHEET

Directions: Prior to completing this review, your 2023-24 FAFSA info must be verified using the V1 verification forms located on the Benedictine website, along with 2021 IRS Tax Transcripts or a signed copy of the 2021 IRS Tax Form 1040. Tax transcripts are not required if you utilized the IRS DRT. Failure to provide will result in delays in the review process.

Student's Last Name	First Name	MI	SSN
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Student ID #

1. If your parents are currently making payments for Parent PLUS loans, please provide payment information indicating the monthly payments made during the 2021 calendar year. **Include copy of payment stubs or lender account activity.**

\$ _____

2. If you or your parent(s) paid tuition expenses at a private elementary, secondary, or home school in 2021, please list the student(s), school(s), and the amount paid for each child. **Include an itemized statement from the school, parish or for the home school expenses.**

\$ _____
\$ _____
\$ _____

3. If you or your parent(s) paid medical or dental expenses "out of pocket" in 2021 **not** covered by insurance or reimbursement, list amount from Schedule A-Itemized Deductions, Line 1. Include a copy of Schedule A or an itemized statement from your health care provider. **Insurance premiums & Cafeteria 125 plans or prepaid medical accounts are NOT allowed.**

\$ _____
\$ _____
\$ _____

4. If you or your parent(s) have recently become unemployed, or there has been a change in income, write a brief synopsis of the situation estimating income for calendar year 2023. Submit a copy of (1) the separation agreement, (2) parent(s) or student's most recent paystub(s) showing annual 2022 earnings-to-date, and (3) current pay-stub from new job.

\$ _____ Anticipated 2023 Annual Earnings

5. \$ _____ If the student is currently working during high school and expects to quit their job due to college enrollment, the summer 2021 earnings will be evaluated as a better representation of the student's ability to contribute toward their education. **Please submit a copy of the paystubs from the beginning and end of the summer.**

6. If your family is maintaining two households due to employment relocation or family care obligations, write a brief synopsis of the situation and provide annual costs associated with the situation and documentation of such expenses for 2021.

\$ _____ Annual Cost

Does your family contribute essential financial support to persons unable to be self-sufficient? This support may be directed to parents in extended care homes or to unemployed/underemployed adult children. Write a brief synopsis of the situation and provide annual costs associated with the situation and documentation of such expenses for 2021.

\$_____ Annual Cost

7. Did your family experience a one-time bump or temporary increase in 2021 yearly income (capital gains, bonus, gaming winnings, stock options, IRA withdrawal, etc.)? Write a brief synopsis and provide annual income associated with the circumstance. **Submit a copy of the 2021 Federal Tax Return showing the amount of such a gain.**

\$_____ Amount of Increase

8. \$_____ If your family paid **funeral expenses** in 2021 not covered by insurance or reimbursed.

9. \$_____ If your family paid **personal legal fees** in 2021 (divorce, death, etc.) that are not tax deductible.

10. \$_____ If your family paid **adoption expenses** in 2021 documented on IRS Form 8839 (submit a copy of form).

11. If one of the parents will be attending college with the intent of receiving a degree, **please provide proof of enrollment**; indicate the parent’s name, college name, degree and the hours only if there is no tuition reimbursement from any source.

Name _____ College _____ Degree _____ Fall _____ Hrs _____ Spring
Hrs _____

This information will be used, in combination with your 2023-24 FAFSA, to determine student’s eligibility for Federal Financial Aid and attempt to reflect student’s true ability to contribute toward their college education. Before this Special Circumstances Worksheet can be used to evaluate your unique situation, you must file your 2023-24 FAFSA on-line at www.studentaid.gov.

Sign below to certify that the amounts used on this form are correct. You may be requested to provide proof (receipts, cancelled checks, affidavits, etc.) of this statement’s information.

Parent’s Signature

Date

Student’s Signature

Date



2023–2024 Dependent Verification Worksheet - V1

Your 2023–2024 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law states that before awarding Federal Student Aid, we may ask you to confirm the information you and your parent(s) reported on your FAFSA. To verify the information you provided, please complete the questions below, include parent(s) and student signature, and mail or fax the form with any required documents to the Financial Aid Office. **Please turn in all documents requested ASAP to avoid delays in processing your Financial Aid.** If you have questions regarding verification, contact us at 913-360-7484 or finaid@benedictine.edu.

A. Student’s Information

Student’s Last Name	First Name	M.I.	Student’s Last 4 of SSN
Student’s Street Address (include apt. no.)			Student’s Benedictine School ID#
City State Zip Code			Student’s Phone Number

B. Family Information

Include on the chart below:

- **Yourself**
- **Your parent/stepparent**
- **Your siblings**

Include other people as part of your family only if:

- 1- They lived with your parent/stepparent and received more than half their support at the time you completed your FAFSA **AND**
- 2- They will continue to receive more than half their support from your parent/stepparent from July 1, 2023 through June 30, 2024.

Full Name	Age	Relationship	Name of College	Enrolled at least half time
		Self	Benedictine College	Yes
		Parent1	Not Eligible	Not Eligible
		Parent2	Not Eligible	Not Eligible

Of those listed above, write in the name of the college for any family member excluding parent/stepparent who will be enrolled at least half time in a degree or certificate program between July 1, 2023 and June 30, 2024. Note: If you need more space, attach a separate page.

C. Verifying Taxable Income

You can use either the IRS Data Retrieval Tool through your FAFSA, **OR** you can submit a **SIGNED** copy of your complete **2021** federal tax return, including all schedules and attachments. Since the information we are requesting is from **2021**, your tax information should be readily available. (If you have not yet filed your **2021** federal tax return, please contact our office.) Below is some helpful information about using the IRS Data Retrieval Tool, it is easy to use but if you are not successful with it, please submit your signed copy of your federal tax return as instructed above.

IRS Data Retrieval Tool (DRT):

Go to studentaid.gov and indicate that you want to make a correction to your FAFSA. Navigate to the “Income” section. If you check that the tax return is already completed, the FAFSA will prompt you about using the IRS Data Retrieval Tool. You will not be able to use the DRT if:

- Your tax filing status is Married Filing Separately
- You have divorced after the tax filing year
- You filed a foreign tax return

FAFSA will link you to the IRS web site where you will need the SSN of the first person listed on the tax return. Follow the directions. After the tax information is transferred back to your FAFSA, remember to hit save and submit so our office will receive your new FAFSA. You may do this for student taxes that were filed as well.

Student Tax/Income Information

Please check the box that applies:

- I did file a **2021** federal tax return and I have used the **IRS DRT** to retrieve and transfer my **2021** IRS income tax return information into my 2024-2024 FAFSA.
- I did file a **2021** federal tax return and will submit a **SIGNED** copy of the complete **2021** federal tax return to the Financial Aid Office.
- I did not file and was not required to file a **2021** federal tax return.

IF YOU DID NOT FILE A TAX RETURN, PLEASE ALSO COMPLETE:

- I was not employed and had not income earned from work in **2021**.
- I was employed in **2021** and earned income. Complete the chart below listing all employers, the amount earned from each and attach all W-2(s).

Employer Name	2021 wages earned	W-2 required
Suzy's Auto Body Shop (example)	\$2,000.00	Yes
		Yes
		Yes
		Yes

Parent(s)/Stepparent Tax/Income Information

Please check the box that applies:

- I/we did file a **2021** federal tax return and used the **IRS DRT** to retrieve and transfer **2021** IRS income information into the 2023-23 FAFSA.
- I/we did file a **2021** federal tax return and will submit a **SIGNED** copy of the complete **2021** federal tax return to the Financial Aid Office.
- I/we did not file and were not required to file a **2021** federal tax return. You will need to log into www.IRS.gov/transcript and click "Get Transcript Online" to request the Verification of Non-filing form for tax year ending 12/31/2021 for the parent(s) that did not file a **2021** federal tax return and provide that document along with this verification.

IF YOU DID NOT FILE A TAX RETURN, PLEASE ALSO COMPLETE:

- I/we were not employed and had not income earned from work in **2021**.
- I/we were employed in **2021** and earned income. Complete the chart below listing all employers, the amount earned from each and attach all W-2(s).

Employer Name	2021 wages earned	W-2 required
Suzy's Auto Body Shop (example)	\$2,000.00	Yes
		Yes
		Yes
		Yes

If the parents filed separate 2021 IRS income tax returns such as married filing separate, the signed federal tax return must be provided for each parent.

D. Certifications and Signatures

Each person signing below certifies that all the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. **Warning: If you purposely give false or misleading information on this worksheet, you may be fined and/or sentenced to jail.**

Student's Signature

Date

Parent's Signature

Date

Please mail to: **Benedictine College Financial Aid Office 1020 N 2nd Street Atchison, KS 66002**
Or Fax: **888-837-6765**