

Carson-Newman University

2024-2025 Special Circumstance Appeal for Independent Students

Student's Last Name	Student's First Name	Student's M.I.	Student's Identification (ID) Number
Student's E-Mail Address			Student's Home/Cell Phone Number

This Appeal is a request for a review of special circumstances that you feel may change your financial aid eligibility. Professional Judgment refers to the school's authority to make adjustments to the data elements reported on the Free Application for Federal Student Aid (FAFSA) so that the Department of Education can recalculate the Student Aid Index (SAI). The SAI is the number the school uses to determine a student's eligibility for need-based financial aid. The school does not have the authority to make direct adjustments to the SAI and can only change data elements that may change the SAI. The Appeal process is an extensive process that requires a thorough review by Financial Aid staff to determine what, if any, changes may be appropriate based on your appeal. Please allow 4 to 6 weeks for processing time. It is a time-intensive process that includes the following steps:

1. **The Financial Aid staff will determine if your Appeal meets the basic criteria for further review.**
2. **If the basic eligibility requirements are met, the file will then be reviewed to determine if all required documentation has been submitted. If additional documentation is required, the student will be notified via email.**
3. **Once the Financial Aid Office has received all the necessary documentation, our staff will verify the accuracy of the information initially submitted on the FAFSA (verification process).**
4. **After we ensure the accuracy of the initial FAFSA information, The Financial Aid Appeals Committee will then evaluate the appeal, make appropriate changes to the FAFSA file (if approved), and submit those changes for processing. If the appeal is denied, there will be no further adjustments to make on the FAFSA.**
5. **Once the reprocessed SAI (Student Aid Index) is received, the student's eligibility for need-based aid will be re-evaluated. The student will receive an email notification about any aid revisions or adjustments.**

PLEASE COMPLETE IN BLUE OR BLACK INK. FORMS COMPLETED IN PENCIL WILL NOT BE ACCEPTED.

Please note:

*If we verify the current FAFSA, and there is information that was estimated or reported incorrectly, **the corrections may result in an SAI that is higher than what your current record indicates**. Therefore, the student may have received aid they never would have qualified for had the FAFSA information and the SAI been correct prior to the appeal. The student will lose any financial aid they weren't eligible for unless they demonstrate eligibility after the Appeal is approved and then applied.*

Please note:

Even if the Appeal process results in a lower SAI, the change MAY NOT be significant enough to generate additional eligibility for need-based financial aid.

We recommend you complete your current aid requirements and accept any current financial aid that you need to use to satisfy your bill. Due to the nature of the appeal process, your request may not be completed before the payment deadline. You must satisfy your semester bill even if your appeal has not been reviewed or finalized, or a Treasurer's hold may be placed on your registration.

Step One - Letter of Explanation

Provide a detailed letter of explanation regarding your current situation that you are asking us to consider. Please remember to include applicable dates and any documentation supporting your circumstances. This letter should be written and signed by the student.

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Step Two- Required Documents

Complete the section below that corresponds to your circumstance. Please note the documentation required for each situation.

Situation	Required Documentation (please check if included)
<input type="checkbox"/> You or your spouse had a total loss of full-time employment for at least six (6) weeks . Please note: Loss of income for the 2022 calendar year will NOT be considered for special circumstances appeal as this process will be based on <i>current</i> year data only. Name of person unemployed: _____ Their relationship to Student: _____ Number of weeks unemployed: _____	_____ Copy of 2022 IRS Tax Return Transcript or signed copy of 2022 IRS Tax Return _____ Copy of 2023 IRS Tax Return Transcript or signed copy of 2023 IRS Tax Return _____ Employer's written notice of termination of employment _____ Copies of 2024 pay stubs for all employment _____ Documentation of unemployment benefits & amount received _____ Documentation of all other sources of income (taxed & untaxed) _____ Attending doctor's statement of disability _____ Documentation of date disability/disaster caused unemployment _____ Documentation of employer disability payment _____ Documentation of Worker's Compensation _____ Documentation of Official Declaration of Natural Disaster status _____ IRS Letter of Non-Filing for student or spouse (if they did not files taxes)
<input type="checkbox"/> You or your spouse had a total loss of untaxed income or benefit . Benefit Lost: _____ Unemployment _____ Social Security _____ Child Support _____ Other: _____ Last date benefit received: _____	_____ Copy of 2022 IRS Tax Return Transcript or signed copy of 2022 IRS Tax Return _____ Copy of 2023 IRS Tax Return Transcript or signed copy of 2023 IRS Tax Return _____ Benefit provider's notification of loss of benefit _____ Documentation of amount of benefits received in 2022 and 2023 _____ Copies of 2024 pay stubs for all employment _____ Documentation of all other sources of income (taxed & untaxed) _____ Documentation of unemployment benefits & amounts received in 2022, 2023, and 2024. _____ Court documents verifying date of loss of child support _____ IRS Letter of Non-Filing for student or spouse (if they did not files taxes)
<input type="checkbox"/> You or your spouse had an unusual one-time income reported on your 2022 IRS Tax Return. <i>*Please note: Income used towards discretionary expenses may not be taken into consideration as a reason to adjust aid eligibility.</i>	_____ Copy of 2022 IRS Tax Return Transcript or signed copy of 2022 IRS Tax Return _____ Copy of 2023 IRS Tax Return Transcript or signed copy of 2023 IRS Tax Return _____ Documentation of source of income _____ Signed and dated statement indicating how the one-time income was used, along with supporting documentation _____ IRS Letter of Non-Filing for student or spouse (if they did not files taxes)
<input type="checkbox"/> You have already filed your 2024-25 FAFSA and since that time: _____ your spouse has passed away. _____ you and your spouse have separated or divorced. Date of occurrence: _____	_____ Copy of 2022 IRS Tax Return Transcript or signed copy of 2022 IRS Tax Return _____ Copy of 2023 IRS Tax Return Transcript or signed copy of 2023 IRS Tax Return _____ Copy of court documented separation/divorce decree and/or documentation of separate residences. _____ Copy of spouse's death certificate. _____ IRS Letter of Non-Filing for student or spouse (if they did not files taxes)
<input type="checkbox"/> OTHER: _____ <i>Please note: The Financial Aid staff will review your circumstance to determine if it is a viable situation for professional judgment.</i>	_____ Copy of 2022 IRS Tax Return Transcript or signed copy of 2022 IRS Tax Return _____ Copy of 2023 IRS Tax Return Transcript or signed copy of 2023 IRS Tax Return _____ All applicable documentation to support your circumstance. _____ IRS Letter of Non-Filing for student or spouse (if they did not files taxes)

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***How to Obtain an IRS Tax Return Transcript or a Letter of Non-Filing**

- Make an online request at <https://www.irs.gov/individuals/get-transcript>
The requester must have access to a valid email address, a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the requester's name, and specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript will display online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request: 1-800-908-9946
Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.
- Paper request: IRS Form 4506T. This form needs to be used if you have moved since filing your taxes. The form can be downloaded at www.irs.gov, click "Get Transcript by MAIL." The transcript is generally received within 10 business days.

Step Three – 2024 Estimated Income Information

Complete this section to the best of your ability	Student	Spouse
Estimated 2024 income earned from work.		
Estimated 2024 US income tax paid		
Estimated 2024 unemployment benefits		
Estimated 2024 other taxable income and benefits		
Estimated 2024 untaxed income and benefits		

Step Four – Complete Verification Worksheet and Requirements

Complete the attached Independent Verification Worksheet and attach all verification requirements listed on the form. Return it with this appeal and your documentation to the Financial Aid Office. If you have already completed and submitted the Independent Verification Worksheet, you do not need to submit another one.

Signatures

The student must sign and date below. If married, the spouse's signature is optional.

WARNING! If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail or both.

Each person signing this worksheet certifies that all the information reported is complete and correct.

Student's Signature

Date

Spouse's Signature (not required)

Date

Please make a copy of this worksheet for your records.
Submit this worksheet to the Financial Aid Office at Carson Newman University, 1646 Russell Avenue, Jefferson City, TN 37760, by email at financialaid@cn.edu, or by fax at 865-471-2035.
If you should have any questions, please contact the Financial Aid Office at 1-800-678-9061 or 865-471-3247.

Carson-Newman University

2024-2025 Independent Verification Worksheet

Student's Last Name	Student's First Name	Student's M.I.	Student's Identification (ID) Number
Student's E-Mail Address			Student's Home/Cell Phone Number

Your 2024-2025 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. This process is mandated by the US Department Education, requiring schools to verify the data provided on the FAFSA to ensure its accuracy. We must ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information, we will compare your FAFSA with the information on this worksheet and with any other required document(s). If there are differences, your FAFSA information may need to be corrected.

You must complete and sign this worksheet and submit it to the Financial Aid Office at your earliest convenience. Please note that additional documentation may be requested for clarification.

PLEASE COMPLETE IN BLUE OR BLACK INK. FORMS COMPLETED IN PENCIL WILL NOT BE ACCEPTED.

A. Household Information

List below the people in your household whose information was included on the FAFSA. Include:

- ☐ Yourself (the student)
- ☐ Your spouse if you are married.
- ☐ Your children if you will provide more than half of their support from July 1, 2024, through June 30, 2025, or if the child would be required to provide your information if they were completing a 2024-2025 FAFSA. Include children who meet either of these standards even if they do not live with you.
- ☐ Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2025.

Include the name of the college/university for any household member who will be enrolled at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2024, and June 30, 2025. *If more space is needed, write below if there is room or attach a separate page with the student's name and ID number at the top.*

Household Members	Age	Name	Name of College/University Attending	Enrolled at Least Half Time (Y/N)
<i>Student</i>			<i>Carson-Newman University</i>	
<i>Spouse</i>				
<i>Child</i>				
<i>Child</i>				
<i>Child</i>				
<i>Child</i>				
<i>Other</i>				
<i>Other</i>				

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B. Income Tax Information

Check **ONE** box that applies to you (the student) and **ONE** box that applies to your spouse (if applicable).

STUDENT	SPOUSE
<p><input type="checkbox"/> I filed a 2022 Federal Tax Return.</p> <p><input type="checkbox"/> Yes. While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript <u>OR</u> a signed copy of your 2022 Federal Tax Return along with <u>ALL</u> applicable schedules.</p> <p><input type="checkbox"/> No. I did not consent for my Federal Tax Information to be pulled over to my FAFSA. I provided my information manually. You must submit a copy of your 2022 Federal Tax Return Transcript. *</p> <p><i>(See information below)</i></p>	<p><input type="checkbox"/> I filed a 2022 Federal Tax Return.</p> <p><input type="checkbox"/> Yes. While completing the FAFSA, if you consented and the FA-DDX pulled over your Federal Tax Information, no additional tax documents are needed. If the FA-DDX transfer was ineffective, you must submit a 2022 IRS Tax Return Transcript <u>OR</u> a signed copy of your 2022 Federal Tax Return along with <u>ALL</u> applicable schedules.</p> <p><input type="checkbox"/> No. I did not consent for my Federal Tax Information to be pulled over to my FAFSA. I provided my information manually. You must submit a copy of your 2022 Federal Tax Return Transcript. * If student and spouse filed separate 2022 IRS Income Tax Returns, the 2022 Tax Return Transcripts must be provided for each.</p> <p><i>(See information below)</i></p>
<p><input type="checkbox"/> I did NOT file a 2022 Federal Tax Return but did earn income in 2022; however, I was not required to file taxes. (Complete Section C)</p> <p>*An IRS Letter of Non-Filing is required for the student if they did NOT file 2022 taxes** <i>(see information below)</i></p>	<p><input type="checkbox"/> I did NOT file a 2022 Federal Tax Return but did earn income in 2022; however, I was not required to file taxes. (Complete Section C)</p> <p>*An IRS Letter of Non-Filing is required for the spouse if they did NOT file 2022 taxes** <i>(see information below)</i></p>
<p><input type="checkbox"/> I was NOT employed and had NO INCOME earned from work in 2022.</p> <p>*An IRS Letter of Non-Filing is required for a student if they did NOT file 2022 taxes** <i>(see information below)</i></p>	<p><input type="checkbox"/> I was NOT employed and had NO INCOME earned from work in 2022.</p> <p>*An IRS Letter of Non-Filing is required for a spouse if they did NOT file 2022 taxes** <i>(see information below)</i></p>

*How to Obtain an IRS Tax Return Transcript or a Letter of Non-Filing

- Make an online request at <https://www.irs.gov/individuals/get-transcript>
The requester must have access to a valid email address, a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the requester's name, and specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript will display online upon successful completion of the IRS's two-step authentication.
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C. Submit Copies of W-2's (For Non-Tax Filers)

All non-tax filers (student and spouse, if applicable) must provide copies of all your W-2 forms for income earned from work that were NOT filed with a 2022 Federal Income Tax Return. If you have lost any W-2's, you may order a Wage and Income Transcript from the IRS. You can request this transcript from www.irs.gov. If no employer W-2 can be provided, please list below the employer's name, amount earned for 2022, and the reason it cannot be provided.

Employee's Name (Student or Spouse)	2022 Amount Earned	Employer's Name	Reason for Not Providing

D. Signatures

The student must sign and date below.

WARNING! If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail or both.

Each person signing this worksheet certifies that all the information reported is complete and correct.

 Student's Signature

 Date

 Spouse's Signature (optional)

 Date

Please make a copy of this worksheet for your records.

Do not mail this worksheet to the U.S. Department of Education.

Submit this worksheet to the Financial Aid Office at Carson Newman University, 1646 Russell Avenue, Jefferson City, TN 37760, by email at financialaid@cn.edu, or by fax at 865-471-2035.

If you should have any questions, please contact the Financial Aid Office at 1-800-678-9061 or 865-471-3247.