2022-2023
Special Circumstance Appeal Form

Complete this form if you/your family have unusual circumstances that may affect your ability to contribute to your 2022-2023 educational expenses. Our appeal committee will consider appeals for Employment Loss; Divorce/Separation; Excessive Medical expenses; or Death. We will re-evaluate your financial aid eligibility for possible adjustments to your aid. An appeal may only be completed for those included on your 2022-2023 FAFSA.

- Special Circumstances Appeals are limited to one per academic year (Fall or Spring or Summer).
- Additional documents may be required when our appeal committee evaluates your special circumstance appeal.
- Check appeal status by logging in to your myState account to see if you have any outstanding documents (select Eligibility Requirements under the Financial Aid menu).
- Appeal will not be reviewed until ALL required documents have been signed and submitted.

Reasons for Special Circumstance Appeal – Answer questions and provide documents as specified.

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<th>1. Employment Loss – layoff/termination/job change that resulted in income reduction since 2020</th>
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<td>Name of person who experienced the loss:</td>
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<td>Relationship to student (check box):</td>
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<td>Did/will this person receive unemployment?</td>
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<tr>
<td>Is this person now employed?</td>
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<td>Was loss voluntary?</td>
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1. REQUIRED DOCUMENTS: All tax documents for BOTH parents, (or student and spouse if Independent):

1) Detailed letter (typed and signed). explaining circumstances (indicate who experienced the loss, when the loss occurred, and any other relevant information and dates).
2) Termination/separation letter (Employer signed) and copy of severance package (if severance received)
3) Copy of Unemployment Benefits Statement (if applicable)
4) **2020 and 2021 – Signed** copies of 1040 (first 2 pages), or Tax Return Transcripts
5) **2020 and 2021** – copies of ALL Schedules filed
6) **2020 and 2021** – copies of ALL W-2 Forms or IRS Wage and Income Transcripts, and/or 1099 Forms
7) If you did not file a 2021 1040 tax return or if requesting to use current year income, provide copies of **most current 3 month’s pay stubs** – must show gross year-to-date income.

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<th>2. Death – if death occurred in 2021 or later</th>
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<td>Name of deceased parent:</td>
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2. REQUIRED DOCUMENTS:

1) Detailed letter explaining circumstances (typed and signed)
2) Copy of Death Certificate or full Obituary
3) 2020 signed copy of 1040 (first 2 pages), or Tax Return Transcript (if deceased was on 2020 taxes)
4) 2020 copies of ALL Schedules filed
5) 2020 copies of ALL W-2 Forms and/or 1099 Forms
3. Divorce or Separation – must occur AFTER FAFSA has been submitted – select only 1 check box below

AFTER FAFSA was submitted, Custodial Parent is:

- Divorced from student’s biological/adoptive parent
- Separated from student’s biological/adoptive parent
- Divorced from student’s stepparent
- Separated from student’s stepparent

Name of Custodial Parent on FAFSA: 
Date of Divorce: 
Date of Separation (if not divorced): 
Temporary absences from home are not considered

3. REQUIRED DOCUMENTS – provide All tax documents for Custodial parent (or student if Independent):

1) Detailed letter explaining circumstances (typed and signed)
2) Copy of divorce decree if divorced
3) If separated – signed letter from lawyer specifying separation with intent to divorce
   a. Or copies of current Utility bills/lease agreement in both parent’s names to verify separate addresses
4) 2020 SIGNED copies of 1040 (first 2 pages), or Tax Return Transcripts
5) 2020 copies of ALL Schedules filed
6) 2020 copies of Custodial Parent’s W-2 Forms or IRS Wage and Income Transcripts, and/or 1099 Forms
   a. If all of the 2020 income is other Parent’s, provide copies of their W-2 and/or 1099 Forms if available

4. Excessive Medical Expenses – paid out-of-pocket in 2020 or 2021 only

Name of person who had excessive medical expenses: 
Year medical expenses occurred:

4. REQUIRED DOCUMENTS:

1) Detailed letter explaining circumstances (typed and signed)
2) 2020 or 2021 – SIGNED copy of 1040 (first 2 pages), or Tax Return Transcripts
3) 2020 or 2021 – copies of ALL Schedules filed
4) 2020 or 2021 copy of Schedule A required – shows eligible medical expenses paid
   a. FAFSA already includes 11% of the Income Protection Allowance for medical expenses
5) If no Schedule A was filed, provide signed statement from 2020 or 2021 tax preparer specifying why no Schedule
   A filed for medical expenses paid, or provide a copy of your 2020 or 2021 medical payments (what you paid out
   of pocket beyond what your insurance has paid).

REQUIRED Signatures

Dependent students – Both Student and Parent signatures are required.
Independent students – Student and Spouse signatures are required (if married).

By signing this form, I certify that all the information on this form and any attachments are complete and accurate
information to the best of my knowledge. Warning: Purposely giving false or misleading information may result in a
fine, imprisonment, or both. Handwritten signatures required – no initials or electronic signatures.

Student Signature ____________________________________________  Date ___________
Student’s Spouse Signature ____________________________________  Date ___________
Parent Signature _____________________________________________  Date ___________