

Special Circumstances Appeal 2024-2025



Name _____ Phone _____ Dragon ID _____

Address _____

Students have the option to file a Special Circumstances Appeal when their financial situation has significantly changed and 2022 tax information as reported on the 2024-2025 Free Application for Federal Student Aid (FAFSA) does not accurately reflect their current financial condition. Appeals are reviewed by a committee and based on professional judgment. Additional information may be requested. Appeals may be approved, denied, or tabled for review later in the academic year.

Required Documentation for All Appeals

- A completed 2024-2025 Free Application for Federal Student Aid, AND
- A signed letter clearly explaining the special circumstance, AND
- A signed copy of the student's and parents' (and spouse's, if married) 2022 and 2023 federal income tax return (with all schedules) and W-2s.

Appeal Circumstances and Additional Documentation

Involuntary loss of employment or pay reduction

- o Termination/separation letter
- o Documentation of severance package
- o Final earnings statement from the previous employer
- o Unemployment benefit notice

Significant medical or dental expenses not covered by insurance for those in the FAFSA family size

NOTE: Expenses incurred but not paid do not qualify for consideration

- o Copies of billing statements from the medical or dental provider(s) and proof of payment OR a copy of the 2022 Schedule A
- o Expenses paid that are not reported on the 2022 Schedule A

One-time income received in 2022 that will not be received in 2023 and/or 2024

- o Document the final payment and total amount received in 2022

Conversion of a regular IRA to a Roth IRA by transferring funds in 2022

Death of a parent or spouse after the FAFSA was submitted

- o Copy of the death certificate or obituary

Divorce or separation after the FAFSA was submitted

- o Copy of legal separation/divorce agreement (court-issued or letter from attorney)
- o Proof of separate addresses (i.e. utility bills, lease)

Budget adjustments

o The standard budget reflects the average cost of tuition and fees; books, course materials, supplies, and equipment; living costs; and personal and incidental expenses including a transportation allowance. Only extraordinary educational expenses that occur during the academic year and substantially exceed those allowed in the standard budget are considered. Receipts or purchase invoices are required.

o Examples of expenses that may be considered:

- Computer purchase
- Musical instrument (majors only)
- Costs associated with a disability not covered by insurance or another agency
- Books, course materials, supplies, and equipment in excess of allowance
- Cost of first professional credential

Other

- o Any circumstance not listed above

