

# Special Circumstances Appeal 2023-2024



Name \_\_\_\_\_ Phone \_\_\_\_\_ Dragon ID \_\_\_\_\_

Address \_\_\_\_\_

Students have the option to file a Special Circumstances Appeal when their financial situation has significantly changed and 2021 tax information as reported on the 2023-2024 Free Application for Federal Student Aid (FAFSA) does not accurately reflect the current financial condition. Appeals are reviewed by a committee and based on professional judgement. 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 2023-2024 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) 2021 and 2022 federal income tax return (with all schedules) and W-2s.

## Appeal Circumstances (check all that apply)

### Involuntary loss of employment or pay reduction

- o Termination/severance letter
- o Final earnings statement from the previous employer
- o Unemployment documentation (including the Maximum Benefits Available)

### Significant medical or dental expenses not covered by insurance for family members in the FAFSA household

**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 2021 federal income tax return Schedule A (preferred in lieu of receipts or checks)
- o Expenses paid that are not reported on the 2021 federal income tax return Schedule A

### One-time income received in 2021 that will not be received in 2022 and/or 2023

- o Document the final payment and total amount received in 2021

### Death of a parent or spouse

- o Copy of the death certificate

### Divorce or separation after the FAFSA was filed

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

### Exceptional expenses

- o The standard budget reflects the average cost of tuition and fees; 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.
- o Examples of expenses that may be considered are computer purchase (once per college enrollment), musical instrument purchase (majors only), costs associated with disability (not covered by insurance or another agency), or course materials, supplies, and equipment in excess of allowance. Receipts or purchase invoices are required.

### Other

- o Any circumstance not listed above

## Explanation and Anticipated Income

Provide an explanation of your special circumstance. Include information about any anticipated income. Attach additional pages as needed.

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## Timeline

The initial review of your appeal will take place within 20 business days of receipt. Requests for additional documentation may extend the processing time. Appeals submitted August through September may take up to eight weeks to review.

## Certification and Signatures

This appeal must be signed by the student and at least one parent whose information is reported on the 2023-2024 FAFSA.

- I/We certify that all of the information provided is true and complete to the best of our knowledge.
- I/We understand that failure to provide any documentation as requested will result in denial of this application.
- I/We understand that any misrepresentation of the facts in connection with this appeal may be sufficient cause, in and of itself, for cancellation or repayment of financial aid, whenever discovered.

Student \_\_\_\_\_ Parent \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

**RETURN THIS COMPLETED AND SIGNED FORM TO:**  
 Minnesota State University Moorhead • Office of Scholarship and Financial Aid • MSUM Box 90 • 1104 7th Avenue South • Moorhead, MN 56563  
 218.477.2251 • Fax: [finaid@mnstate.edu](mailto:finaid@mnstate.edu) 218.477.2058 • E-mail: [finaid@mnstate.edu](mailto:finaid@mnstate.edu)