

# Special Circumstances Appeal 2026-2027



Name \_\_\_\_\_ Student ID \_\_\_\_\_

Students have the option to file a Special Circumstances Appeal when their financial situation has significantly changed and 2024 tax information as reported on the 2026-2027 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. An initial review of the appeal will take place within 20 business days of receipt. Requests for additional documentation may extend the processing time. Appeals submitted in August or September may take up to eight weeks to review. Appeals may be approved, denied, or tabled for review later in the academic year.

## Documentation Required for All Appeals

- A completed 2026-2027 Free Application for Federal Student Aid, AND
- A signed explanation of the special circumstance, AND
- A signed copy of 2024 and 2025 federal income tax returns (with all schedules) and W-2s for the student and all FAFSA contributors.

## Appeal Circumstances and Additional Documentation

### Loss of employment

- 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 2024 Schedule A
- o Expenses paid that are not reported on the 2024 Schedule A

### One-time income received in 2024 that will not be received in 2025 and/or 2026

- o Document the final payment and total amount received in 2024

### Conversion of a regular IRA to a Roth IRA by transferring funds in 2024

### 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 divorce agreement or legal separation (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

