2014 – 2015 Buffalo State
Special Circumstance Application

Name ____________________________________  Banner ID _______________________________

Student Phone: ____________________________  Other/parent Phone: _______________________

Sometimes the Free Application for Federal Student Aid (FAFSA) does not adequately reflect a family’s financial situation due to extenuating circumstances. Buffalo State is given authority by Congress to make adjustments to information submitted on the FAFSA form on a case-by-case basis if we believe such adjustments are warranted. Listed below are situations in which we may consider making adjustments. Please complete the sections that apply, providing all requested documentation and any additional documentation that you believe would support your request. A separate form is required for loss of income and is available on our website. The deadline date to submit the Special Circumstance Application is April 15, 2015.

___ 1. Childcare expenses – for student’s dependents. In most cases, only a student’s loan or work-study eligibility will be affected. Attach signed copies of childcare invoices for each dependent.

How many children need full-time childcare? _______  Names/ages ___________________________

How many children need after school childcare? _______  Names/ages ___________________________

Estimated total weekly cost $_____________

For conditions 3 – 7 you must also complete the attached Verification Worksheet and supply copies of 2013 federal income tax transcript and W-2 forms as detailed on the worksheet. If you already submitted the Verification Worksheet or tax forms this year you do not need to submit duplicate copies.

To request federal tax return transcripts, go to: "Get-Transcript" (http://www.irs.gov/Individuals/Get-Transcript)

___ 2. Parents in college – to have parent’s tuition expenses considered in the dependent student’s aid eligibility. You will be sent an enrollment verification form after October 1, or February 15 respectively. No adjustments will be made without the verification of enrollment. Parents must be seeking a degree to qualify.

___ 3. Private elementary or secondary school tuition – day care, preschool, and private college costs are not considered expenses under this category. Attach copies of billing statements for the 2014-2015 school year that show the net cost (minus scholarships).

___ 4. Cessation of benefits – in cases where benefits such as child support or Social Security Survivor’s Benefits cease due to a student turning a certain age.

We were receiving $__________ on a monthly basis. As of ____________ those benefits will no longer be received.

___ 5. Lump sum distribution – One Time Only consideration while attending Buffalo State
This could be a capital gain, a one-time distribution from a retirement plan, or some other situation in which the money was not received in the previous year and will not be received in the next year.

We received $__________ in the form of a one-time disbursement. Please document where this money is at the present time (e.g. savings account, investments). _____________________________
6. **Unusually high medical expenses** – Only families with medical coverage that have paid out a large percentage of the family income towards medical expenses may be able to receive an offset against income. Only the charges that are actually paid by the family can be counted. Costs covered by insurance or paid by someone else cannot be counted.

In calendar year **2013 or 2014 (circle one)**, we will have the following out of pocket medical charges:

- Doctor’s bills $________
- Dental/Orthodontia bills $________
- Prescriptions $________
- Insurance premiums $________
- Eye Care $________
- Hospital Care/Lab Work $________

7. **Parents separated /divorced. Date of current marital status ____/____/____.**
   Must provide a legal document, rental or lease agreement or canceled rent checks for 3 months or for the parent that moved to a different location: 3 months utility bills (i.e. gas, electric, cable).

8. **Other** – Describe in detail in the space below.

   Note: Adjustments will not be made for geographic differences in cost of living or based on an accounting of personal income against monthly bills. No adjustments are made for things like the purchase of a new or used vehicle.

   **Required:** Please describe the special circumstances for which you are requesting an adjustment to your federal aid application. Give full details. Attach a separate sheet if necessary.

   ____ I have described the special circumstances in detail in the space above.

   ____ I have submitted the 2014 – 2015 Verification Worksheet for conditions 3 – 7.

   ____ I have enclosed copies of my family’s 2013 federal tax transcript including W-2’s for conditions 3 - 7.

   ____ I also understand that the Financial Aid Office can request additional documentation prior to making a decision regarding this request. All decisions are final and at the discretion of the financial aid staff of Buffalo State College.

**Certification and Signature:**

By checking each box and signing my name below, I (we) hereby acknowledge that:

- ☐ All the information reported is true and accurate to the best of my (our) knowledge.
- ☐ I understand that if I (we) do not provide the documentation required, my request can be denied.
- ☐ I also understand that I may submit only one request per academic year, and that the decision of the Financial Aid Office is final.
- ☐ By submitting this request I understand that my FAFSA may be selected for verification during the 2015-2016 academic year to resolve conflicting information.
- ☐ If I provide false or misleading information, I understand that I may be fined, imprisoned or both.

If you are a dependent student, at least one of your parents must sign this form.

**Student Signature** ____________________________ **Date** ____________________________

**Parent Signature** ____________________________ **Date** ____________________________
Your application was selected for review in a process called “verification.” In this process, we are required to compare the information from your application with the information provided on this form and the requested tax forms. If there are differences between your application and the documents you’ve submitted, corrections may need to be made. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

**What you should do:** (use tax forms 2013)

1. Collect applicable financial documents listed at right →
2. Complete all sections, sign the worksheet (and parent if you are required to provide their income information on FAFSA).
3. Contact us with questions about completing this worksheet.
4. Bring or mail the completed worksheet, requested tax information, and other documents to our office (address below).

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### A. Student Information

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>M.I.</th>
<th>Banner ID (or SS#)</th>
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<table>
<thead>
<tr>
<th>Address (include apt. #)</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
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<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>Home Phone Number</th>
<th>Student’s Cell Phone Number</th>
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### B. Family Information

- **Dependent Students:** List below the people in your parents’ household to include:
  - (a) yourself even if you don’t live with your parents;
  - (b) your parent(s) include parents living together even if they are not married, same gender parents, and stepparent.
  - (c) your parents’ other children, even if they don’t live with your parent(s), if (1) your parents will provide more than half of their support from July 1, 2014 through June 30, 2015, or (2) the children would be required to provide parental information when applying for federal student aid; and
  - (d) other people if they now live with your parent’s, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2014 through June 30, 2015.
  - (e) Also write in the name of the college for any family member, excluding your parents, who will be attending college, at least half-time between July 1, 2014 and June 30, 2015, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

- **Independent Students:** Follow instructions above with the exception of (b)&(c). Also include your spouse and any children.

If a sibling listed below is 24 years of age or older, or if someone who fits category (d) “other people” is listed below please have your parent (or you if you are considered independent) submit Form VWOTH15 that can be printed from the following web site: http://www.buffalostate.edu/financialaid/x487.xml or request one by email at finaid@buffalostate.edu

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>College</th>
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</thead>
<tbody>
<tr>
<td>Example: Missy Jones</td>
<td>24</td>
<td>Wife</td>
<td>City University</td>
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<tr>
<td></td>
<td></td>
<td>Self</td>
<td>Buffalo State</td>
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Financial Aid Office · MH 230, 1300 Elmwood Ave, Buffalo, NY 14222-1095
finaid@buffalostate.edu · (716) 878-4902 · fax (716) 878-4903
C. Tax Forms and Income Information

1. If requested by Buffalo State: students, their spouses and the parents of dependent students must submit copies of their 2013 federal income tax transcripts from the IRS if they filed taxes for that year. For foreign income tax returns or those from Puerto Rico a copy of your original tax return may be submitted.

   Check the box below for the people whose taxes are being submitted:

   - Student
   - Student’s Spouse
   - Parent 1 (step)
   - Parent 2 (step)

   If not filing a federal tax return for 2013 complete the chart below. Please state on the line if you did not work.

<table>
<thead>
<tr>
<th>Name of Employer (s) and submit copies of all W2’s</th>
<th>Total $ Earned in 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td></td>
</tr>
<tr>
<td>Spouse</td>
<td></td>
</tr>
<tr>
<td>Parent 1 (step)</td>
<td></td>
</tr>
<tr>
<td>Parent 2 (step)</td>
<td></td>
</tr>
</tbody>
</table>

   **Ordering IRS tax return transcripts:** **Your address MUST appear exactly as it does on your tax return**

   **Print an IRS tax return transcript online immediately:** Go to "Get-Transcript" (http://www.irs.gov/Individuals/Get-Transcript). This link provides immediate access to IRS tax return transcripts and W-2 statements. Registration required.

   **To order an IRS tax return transcript by phone:** Call the IRS at 1-800-908-9946. You will be prompted to enter your social security number and street address, then press 2 to order a tax transcript. It should arrive within 5 – 10 business days.

   **To order a copy of your original W2(s),** complete Form 4506T online at: http://www.irs.gov/pub/irs-pdf/f4506t.pdf. To request a form by mail, call the IRS at 1-800-829-3676.

2. Both tax filers and non-tax filers must list any untaxed income received in 2013.

   **Calendar Year 2013**

   **To prevent delays in processing be sure to enter zeros below if no funds were received.**

<table>
<thead>
<tr>
<th>Include SPOUSE if you are married</th>
<th>Of DEPENDENT students only</th>
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<tbody>
<tr>
<td>$</td>
<td>$</td>
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</table>

   - Child support paid because of divorce or separation or as a result of a legal requirement. **Don’t include** support for children listed on the front of this form.

   - Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. **Attach related W2’s to this form.**

   - Student grant and scholarship aid **reported to the IRS in your adjusted gross income.** Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. **Do not include financial aid received for the prior year.**

   - Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay. Combat pay is reported on the W-2 in Box 12, Code Q.

   - Earnings from work under a cooperative education program offered by a college.

   - Child support received for any of your children. **Don’t include** foster care or adoption payments.

   - Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don’t include** the value of on-base military housing or the value of a basic military allowance for housing.

   - Veterans’ non-education benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

   - Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form.

   - Other untaxed income not reported, such as workers’ compensation, disability, etc. Also include the first-time homebuyer tax credit from IRS Form 1040—line 67. **Don’t include** student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

   **Source of income:**

   **D. Sign This Worksheet** - By signing this worksheet, I (we) certify that all the information reported is complete and correct. If you are a dependent student, at least one of your parents must sign.

<table>
<thead>
<tr>
<th>Student’s Signature</th>
<th>Date</th>
<th>Parent’s Signature - dependent students only</th>
<th>Date</th>
</tr>
</thead>
</table>