

# Buffalo State College

Banner ID \_\_\_\_\_

Student Phone: \_\_\_\_\_

Name \_\_\_\_\_

Other/Parent Phone: \_\_\_\_\_

## 2017-2018 Special Circumstances Form

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, 2018.**

- \_\_\_ 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 2 – 8 you must also complete the attached Verification Worksheet and supply copies of 2015 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)" (<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 September 15<sup>th</sup>, or February 15<sup>th</sup> respectively. No adjustments will be made without the official verification of enrollment. Parents must be degree-seeking 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 2017-2018 school year that show the net cost (minus scholarships) that you are responsible to pay.

- \_\_\_ 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 **2016 or 2017 (circle one)**, we will have the following out of pocket medical charges:

Doctor's bills	\$ _____	Insurance premiums	\$ _____
Dental/Orthodontia bills	\$ _____	Eye Care	\$ _____
Prescriptions	\$ _____	Hospital Care/Lab Work	\$ _____

\_\_\_ 7. Independent student or parents of dependent student 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. Provide full details. Attach a separate sheet if necessary.

\_\_\_ I have described the special circumstances in detail in the space above.

\_\_\_ I have submitted the 2017 – 2018 Verification Worksheet for conditions 3 – 8.

\_\_\_ I have enclosed copies of my family's 2015 federal tax transcript including W-2's for conditions 3 - 8.

\_\_\_ 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.
- 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 \_\_\_\_\_

# Buffalo State College



## A. Student Information

Banner ID \_\_\_\_\_

Student Phone: \_\_\_\_\_

Name \_\_\_\_\_

Other/Parent Phone: \_\_\_\_\_

Address (include apt. #) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

\_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
 Date of Birth Home Phone Number Student's Cell Phone Number

## 2017-2018 Verification Worksheet - Federal Student Aid Programs

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 federal financial aid until verification has been completed, so please provide the required documents as soon as possible.**

### What you should do: (use 2015 tax year for Prior/Prior Year)

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).

### Dependent Students:

- \*Parent(s) Federal Tax Return Transcript or signed 1040 (if requested)
- \*Parent(s) W2's
- \*Student Tax Return Transcript or signed 1040
- \*Student W2's
- \*Any schedule C, E, or 1099R

### Independent Students/Spouse:

- \* Student/Spouse Federal Tax Return Transcript or signed 1040 (if requested)
- \*Student/Spouse W2's
- \*Any schedule C, E, or 1099R

## 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):** a parent is a person that the State has determined to be a legal parent which includes parents living together even if they are not married, same gender parents, and step-parent.
- (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, 2017 through June 30, 2018, 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, 2017 through June 30, 2018.
- (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, 2017 and June 30, 2018, 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 submit the VWOTH17 form that can be found at the following Web site: <http://www.buffalostate.edu/financialaid/x487.xml> or you may request one via email at [finaid@buffalostate.edu](mailto:finaid@buffalostate.edu).

Full Name	Age	Relationship	College
<i>Example: Missy Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	Buffalo State College

**C1. Tax Forms and Income Information in 2015.** Check one box in each section, as applicable.

<p><b>Dependent Student</b></p> <p><input type="checkbox"/> I did not work.</p> <p><input type="checkbox"/> I worked but I have not filed and I am not required to file a tax return. <i>Next steps:</i> Submit your W-2 statements from 2015.</p> <p><input type="checkbox"/> I filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a>. You must also submit your W-2 statements, and where applicable, a 1098-R and/or Schedules C or E.</p>
<p><b>Parents of Dependent Students (parents listed on FAFSA)</b></p> <p><input type="checkbox"/> My parents did not work in 2015. Submit a written, detailed statement explaining how they supported their family with no income. Include supporting documentation as applicable (e.g., food stamp statement, social security statement).</p> <p><input type="checkbox"/> My parents worked but have not filed and are not required to file a tax return. <i>Next steps:</i> Submit your W-2 statements from 2015.</p> <p><input type="checkbox"/> My parents filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a>. You must also submit your W-2 statements, and where applicable, a 1098-R and/or Schedules C or E.</p>
<p><b>Independent Student</b></p> <p><input type="checkbox"/> I did not work. <i>Next steps:</i> submit a written, detailed statement explaining how you supported yourself with no income.</p> <p><input type="checkbox"/> I worked but I have not filed and I am not required to file a tax return. <i>Next steps:</i> Submit your W-2 statements from 2015.</p> <p><input type="checkbox"/> I filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a>. You must also submit your W-2 statements, and where applicable, a 1098-R and/or Schedules C or E.</p>
<p><b>Independent Student's Spouse (if student is married today)</b></p> <p><input type="checkbox"/> My spouse did not work. <i>Next steps:</i> Submit a written, detailed statement explaining how your spouse was supported in 2015.</p> <p><input type="checkbox"/> My spouse worked but has not filed and is not required to file a tax return. <i>Next steps:</i> Submit your W-2 statements from 2015.</p> <p><input type="checkbox"/> My spouse filed a 2015 federal tax return. <i>Next steps:</i> submit a signed copy of your 2015 tax return or order a federal tax <u>return transcript</u> at <a href="http://www.irs.gov">www.irs.gov</a>. You must also submit your W-2 statements, and where applicable, a 1098-R and/or Schedules C or E.</p>

- ✓ To Obtain Tax Return Transcripts or W-2 Statements Immediately Online: [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript).
- ✓ To Obtain Paper W-2 Statements: contact your employer or go to <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>.

**2. Calendar Year 2015** (be sure to list amounts for the full year)

Both tax filers and non-tax filers must list any untaxed income received in 2015.

	Student	Parent(s) (step-parent)
<b>DO NOT LEAVE BLANKS:</b> Enter \$0 if no funds were received.	<b>Include SPOUSE if you are married</b>	<b>Of DEPENDENT students only</b>
Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported 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.	\$	\$
Taxable college 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. Don't include 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.	\$	XXXXXXXXXXXX
Indicate source: _____	\$	XXXXXXXXXXXX

**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.

Student's Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent's Signature - dependent students only \_\_\_\_\_

Date \_\_\_\_\_