

Buffalo State College

Banner ID: _____

Student Phone: _____

Name: _____

Other/Parent Phone: _____

2018-2019 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, 2019.**

- 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/age: _____

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 2016 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 15th, or February 15th respectively. No adjustments will be made without the official verification of enrollment. Parents must be matriculated (degree-granting program) and enrolled at least half-time 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 2018-2019 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 now (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 **2017 or 2018 (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 (mm/dd/yyyy): _____
 - ✓ 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.

Required Documentation Checklist

- I have described the special circumstances in detail in the space above.
- I have submitted the 2018 – 2019 Verification Worksheet for conditions 2 – 8.
- I have enclosed copies of my family's 2016 federal tax return transcript including W-2's for conditions 2 - 8.

Certification and Signature:

By signing my name below, I (we) hereby acknowledge and agree to the following terms of the Special Circumstances appeal process. Additionally, I (we) have submitted all required documents.

- 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 understand that I may submit only one request per academic year.
- I understand that all decisions are final and at the discretion of the financial aid staff of Buffalo State College.
- I understand that other documents may be required before a decision to be made regarding this request.
- 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: _____

A. Student Information

Banner ID: _____ Name: _____

Address (Street, City, State, Zip): _____

Date of Birth: _____ Home Phone: _____ Student's Cell Phone: _____

WHAT IS VERIFICATION? Verification is a federally mandated process by which aid offices compare information reported on the student's Free Application for Federal Student Aid (FAFSA) with tax documents and this worksheet. Your application has been selected for verification. **We cannot finalize your federal financial aid until you submit all required documentation.** Additional documents may be requested after your initial submission; students should monitor Banner regularly for account updates.

DEADLINES: Students that do not complete verification by the established deadline forfeit federal financial aid, including loans. Generally, students must complete verification before they cease enrollment or before the academic year ends, whichever happens first. Deadline details and general FAQs are available at <http://financialaid.buffalostate.edu/verification>.

Steps to Complete Verification

1. Complete all sections of this form. Parent data is required for dependent students.
2. Collect the required tax documents for **2016** based on the student's dependency status.
3. Submit this form and all required tax documents to our office. Include the student's Banner ID on all submissions. If submitting by email, please only submit pdf attachments.

Tax Forms: Dependent Students

- **Student:** Use Table 1 on page 2 to determine which tax documents you must submit.
- **Parent(s):** Use to Table 2 on page 2 to determine which documents you must submit.

Tax Forms: Independent Student

- **Student:** Use Table 3 on page 2 to determine which tax documents you must submit.
- **Student's Spouse (if now married):** Use Table 4 on page 2 to determine which tax documents you must submit.

B. Family Information

Check the appropriate dependency status for the student and complete the household chart below.

 Dependent Students: *In the chart below, list the people in your parents' household. Include the following:*

- yourself** even if you don't live with your parents;
- your parent(s):** If your biological (or adoptive) parents live together, include both parents. If your biological (or adoptive) parents are separated or divorced, include your custodial parent. If your custodial parent is remarried, include your step-parent. For all other scenarios, include the parent you live with. If you don't live with either parent, include the parent that has provided you the most support in the previous 12 months.
- 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, 2018 to June 30, 2019, or (2) the children would be required to include parent information on the FAFSA.
- other people** if they now live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2018 through June 30, 2019.
- If any household members will attend college at least half-time in a matriculated program between July 1, 2018 and June 30, 2019, write the name of the college he/she will attend in the space provided.

 Independent Students: *Follow instructions above except for items (b) & (c). Include your spouse and any children.*

Full Name of Household Member	Age	Relationship to Student	College Name (if enrolled in 1819)
		Self	Buffalo State

Attach a separate page as needed

NOTE: If a sibling listed above is 24 years of age or older, or if someone fits category (d) "other people", please submit the Other People in Household form which can be found at: financialaid.buffalostate.edu/forms.

SUBMIT ALL REQUIRED DOCUMENTS TO:

 Financial Aid Office, MH 230; 1300 Elmwood Ave.; Buffalo, NY 14222-1095
finaid@buffalostate.edu · (716) 878-4902 · fax (716) 878-4903

Banner ID: _____

C1. Tax Filing Status for 2016 and Required Tax Forms

Check the appropriate tax filing status and submit the required documentation listed. Dependent students and their parent(s) should complete Tables 1 and 2. Independent students should complete Table 3, and if married, Table 4.

Table 1: Dependent Student

- I did not work.
- I worked, but I have not filed a federal tax return and I was not required to file. Submit your W-2 statements from 2016.
- I filed a 2016 federal tax return. Submit a copy of your 2016 federal tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules E, if filed.

Table 2: Parents of Dependent Students (parents listed on FAFSA and in household chart on page 1)

- My parents did not work in 2016. Your parent(s) must submit a written, detailed statement explaining how they supported their family with no income. Include supporting documents as applicable (e.g., SNAP statement, social security statement).
- My parents worked, but did not file a tax return and were not required to file a tax return. Submit your parents' W-2 statements from 2016 and request a tax return transcript from the IRS to confirm their non-filing status for 2016.
- My parents filed a 2016 federal tax return. Submit a copy of their 2016 tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedule E, if filed.

Table 3: Independent Student

- I did not work. Submit a written, detailed statement explaining how you supported yourself with no income.
- I worked but I have not filed taxes, and I am not required to file a tax return. Submit your W-2 statements from 2016 and request a tax return transcript to confirm your non-filing status for 2016.
- I filed a 2016 federal tax return. Submit a copy of your 2016 federal tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedule E, if filed.

Table 4: Independent Student's Spouse (if student is married today)

- My spouse did not work. Your spouse must submit a written statement explaining how he/she was supported in 2016.
- My spouse worked but has not filed taxes, and was not required to file a tax return. Submit your spouse's W-2 statements from 2016 and request a tax return transcript to confirm their non-filing status for 2016.
- My spouse filed a 2016 federal tax return. Submit a copy of your spouse's 2016 tax return transcript or use the IRS data retrieval tool in the FAFSA. Also submit your spouse's Schedule E, if filed.

- **IRS Tax Return Transcripts** can be obtained at <https://www.irs.gov/individuals/get-transcript>. Your 1040s are **NOT** acceptable. **Note:** Individuals that used the IRS Data Retrieval Tool to complete the FAFSA typically do not need to submit their Tax Return Transcript. If your Banner Requirements show the Transcript was "verified internally", you do not need to submit the transcript.
- **W-2 Statements** (if required above) must be copies from your original W-2s. To obtain a copy of your W-2, request a Wage Transcript from the IRS, contact your employer, or submit form 4506-T <http://www.irs.gov/pub/irs-pdf/f4506t.pdf> to the IRS.

C2. Other Income Received or Paid during 2016

This section is required for both tax filers and non-tax filers. **If the answer is \$0, you must write \$0. Do not leave blanks.**

Income Received or Paid during 2016	Student Include spouse if married	Parent(s) / step-parent of dependent students
Child support paid because of divorce or separation or legal requirement. Do not 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. Submit related W2's.	\$	\$
Child support received for any of your children. Exclude 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.	\$	\$

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