

Buffalo State University

Banner ID: _____

Student Phone: _____

Name: _____

Other/Parent Phone: _____

2023-2024 Special Circumstances Form

**** Requests must be made while the student is still enrolled in the academic year with sufficient processing time to have the review completed by the end of the enrollment period or end of the academic year, whichever happens first ****

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.

- ☐ **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 \$ _____

- ☐ **2. Special Equipment - i.e.) computer, required supplies for course work, special equipment for disabled students, other** – Provide proof that the equipment is required and an estimated cost.

- ☐ **3. Housing costs above the cost of attendance allowance** – If off campus, provide a copy of your lease.

- ☐ **4. Costs associated with certifications and licenses** – provide proof of actual cost.

**** For conditions 5-11 you must also complete the attached Verification Worksheet and supply copies of 2021 federal income tax return and/or 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.

- ☐ **5. 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.

- ☐ **6. 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 2023-2024 school year that show the net cost (minus scholarships) that you are responsible to pay.

- ☐ **7. Cessation of benefits** – in cases where benefits such as child support 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.

- ☐ **8. 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). _____

- ☐ **9. 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 ☐ **2022** or ☐ **2023** (check 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	\$ _____

- ☐ **10. Independent student or parents of dependent students 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).

11. Other – Please explain in the space below or provide a separate sheet of paper.

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 2023 – 2024 Verification Worksheet for conditions 5 – 11.
- I have enclosed copies of my family's 2021 federal tax return transcript including W-2's for conditions 5 – 11.

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: _____

SUBMIT THIS FORM AND ALL REQUIRED DOCUMENTS TO:

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

Federal Verification Worksheet

Federal Student Aid Programs

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 updates.

DEADLINES: Students that do not complete verification by the established deadline forfeit federal financial aid, including loans. Deadline details and general FAQs are available at <http://financialaid.buffalostate.edu/verification>.

Steps to Complete Verification

1. Complete all sections (A – D) of this form.

Dependent students: data required of parent/step-parent, siblings, and all others living in the household

Independent students: (if applicable) data required of spouse, children, and all others living in the household

2. Collect the required **tax documents from 2021** – use tables on next page

Table 1 – dependent students

Table 3 – independent students

Table 2 – parents of dependent

Table 4 – spouses (if married) of independent

Who should be listed on the Household Information Chart on this form, Section B?

a) List Yourself:

- **Dependent Student** - even if you do not live with your parents
- **Independent Student** - skip **b)** and **c)** below, if applicable include spouse and/or children

b) List your parent(s):

- If your biological (or adoptive) parents live together, include both parents.
- If your biological (or adoptive) parents are separated or divorced, list your custodial parent.
- If your custodial parent is remarried, include your step- parent.
- If your biological parents are unmarried and living together, include both parents
- *For all other scenarios*, list 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.

c) List your parents' other children: (Even if they do not live with your parent(s). Do not include foster children.)

- **If** your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024.
- **Important:** Submit the **Other People in Household (VOTH24)** form for each individual who fall into this category, which can be found at: financialaid.buffalostate.edu/forms.

d) List ALL other people who live in the household:

- **If they now live there AND** your parents, or you, or your spouse, provide more than half of their support and will continue to provide more than half of their support from July 1, 2023, through June 30, 2024.
- **Important:** Submit the **Other People in Household (VOTH24)** form for each individual who falls into this category, which can be found at: financialaid.buffalostate.edu/forms.

- e) Include the name of the college** where any household member on the list will attend next to their name, if they attend at least half-time in a matriculated program between July 1, 2023 and June 30, 2024.

IRS.gov for Non-filing status/Tax Return Transcripts/W-2 Transcripts:

To request an IRS records to confirm your non-filing status, request a tax return transcript or a W2 transcript (if required in section C), visit www.irs.gov/individuals/get-transcript. For 2023-24, request records from 2021.

SUBMIT THIS FORM AND ALL REQUIRED DOCUMENTS TO:

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

2023-2024 Federal Verification Worksheet**A. Student Information**

Banner ID: _____ Name: _____

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

Date of Birth: _____ Cell Phone: _____ Other Phone: _____

B. Household Information – see instructions page

Check the appropriate dependency status and complete the household chart below. List all children or other people living there if the household income provides more than half of their support from July 1, 2023 - June 30, 2024.

☐ **Dependent Students** ☐ **Independent Students**

Full Name of Household Member	Age	Relationship to Student	College Name (if enrolled in 23-24)
		Self	Buffalo State

C. Tax Filing Status for 2021 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 2021.
- ☐ I filed a 2021 federal tax return. Submit a copy of your signed 2021 federal tax return (pages 1 & 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and 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 2021. 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' 2021 W-2 statements and request a tax return transcript from the IRS to confirm their non-filing status for 2021. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at <https://financialaid.buffalostate.edu/forms>.
- ☐ My parents filed a 2021 federal tax return. Submit a copy of their signed 2021 tax return (pages 1 & 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and E, if filed.

Table 3: Independent Student

- ☐ I did not work. Submit a written, detailed statement explaining how you supported yourself with no income in 2021.
- ☐ I worked but I have not filed taxes, and I am not required to file a tax return. Submit your 2021 W-2 statements and request a tax return transcript to confirm your non-filing status for 2021. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at <https://financialaid.buffalostate.edu/forms>.
- ☐ I filed a 2021 federal tax return. Submit a copy of your signed 2021 federal tax return (pages 1 or 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and 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 2021.
- ☐ My spouse worked but has not filed taxes and was not required to file a tax return. Submit your spouse's 2021 W-2 statements and request a tax return transcript to confirm their non-filing status for 2021. If the IRS is unable to furnish the non-filing status letter, submit the Verification of Non-Filing form at <https://financialaid.buffalostate.edu/forms>.
- ☐ My spouse filed a 2021 federal tax return. Submit a copy of your spouse's signed 2021 tax return (pages 1 & 2 only) or tax return transcript or use the IRS Data Retrieval Tool in the FAFSA. Also submit Schedules 1, 2, 3, C and E, if filed.

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