

2023-2024 SPECIAL CIRCUMSTANCES APPEAL INFORMATION

Ability to benefit from an appeal:

Read the following to determine if you will benefit from an appeal:

I filed my FAFSA and received an Expected Family Contribution (EFC) of Zero (0)	→	You are already receiving the maximum in federal aid. Submitting this form will not result in any changes.
I filed my FAFSA and received an Expected Family Contribution (EFC) significantly higher than 7000	→	Submitting an appeal may result in either no change or a change to a partial subsidized student loan rather than all unsubsidized. <i>Note: to be eligible for a Federal Pell Grant, your EFC must be 6200 or less.</i>
I am appealing for more NY State aid (TAP grant or NY State scholarships)	→	This appeal process does not affect your NYS aid. You may wish to inquire with NYS HESC directly by going to hesc.ny.gov/contact-hesc .
I have excessive out-of-pocket medical expenses	→	We can only consider an appeal for PAID medical expenses that exceed 11% of your family's AGI in the year they were incurred.
I am a NY State Excelsior Scholarship recipient	→	Federal Pell grant increases due to this appeal will cause a corresponding decrease to your NYS Excelsior Scholarship, or may reduce your Excelsior to zero. This is a NYS regulation and not something our office can impact.

*If you have other circumstances not mentioned on this form but you feel should be taken into consideration, please write a detailed description of your circumstance, including the student's name and B#, and we will review your individual circumstances and determine if any change is possible to your financial aid offer.

If you wish to pursue an appeal, follow these instructions:

- Step 1:** Review the Special Circumstances on page 2 to determine what documents you will be required to submit. Be sure to include all that are indicated, as we cannot complete your appeal without them.
- Step 2:** Complete the top of page 2 and attach as your cover sheet.
- Step 3:** Attach a signed statement explaining your special circumstances. Be as specific as possible by including details pertinent to your family's new situation such as dates, causes, etc.
- Step 4:** Please submit all requested documentation in a timely manner in order to avoid delays in making a final determination.
- **NOTE:** Tax returns must be signed by the tax-filer and include all schedules filed that year.
 - **NOTE:** Additional documentation may be requested after our initial review of what has been received.

Documents may be uploaded securely by visiting my.binghamton.edu and clicking on **Financial Aid and Student Records Document Submission** (available links section on the left). Select "Financial Aid Documents" to identify the type of document you are submitting. *Scanned or attached documents will no longer be accepted via email.*

2023-2024 SPECIAL CIRCUMSTANCES APPEAL FORM

Student's Name: _____ B-number: _____ Date _____

SPECIAL CIRCUMSTANCE		REQUIRED DOCUMENTATION
<input type="checkbox"/> <u>Loss of Income or Employment in 2022</u> <ul style="list-style-type: none"> ➤ Wages/Employment ➤ Business Income ➤ Alimony ➤ Child Support ➤ Retirement/Pension ➤ Social Security (taxed) ➤ Worker's Compensation 	Income/benefits in 2022 were less than that in 2021	<input type="checkbox"/> 2021 IRS Data Retrieval or signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> 2022 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2022 W-2 wage statements for all. <input type="checkbox"/> Documentation showing loss of income for 2021 including revised benefits statement(s). <input type="checkbox"/> Signed statement detailing special circumstances. <input type="checkbox"/> 2023-24 Verification Worksheet (on our Financial Aid Forms page)
<input type="checkbox"/> <u>Loss of Income or Employment in 2023*</u> <ul style="list-style-type: none"> ➤ Wages/Employment ➤ Business Income ➤ Alimony ➤ Child Support ➤ Retirement/Pension ➤ Social Security (taxed) ➤ Worker's Compensation <p><i>*if due to loss of business income, submit quarterly IRS form 1040-ES or contact our office for further instructions.</i></p>	Income/benefits in 2023 will be less than that in 2021 and 2022	<input type="checkbox"/> 2021 IRS Data Retrieval or signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> Documentation of Business Income for calendar year* <input type="checkbox"/> If loss of employment, documentation showing loss of employment in 2023. Include: <ul style="list-style-type: none"> ○ Final paystub showing YTD earnings. ○ Termination notice from employer. ○ Unemployment benefits notice. <input type="checkbox"/> Revised benefit statement(s), if applicable. <input type="checkbox"/> Most recent paystub showing 2023 YTD earnings for both parents, if applicable. <input type="checkbox"/> Signed statement detailing special circumstances. <input type="checkbox"/> 2023-24 Verification Worksheet (on our Financial Aid Forms page)
<input type="checkbox"/> <u>Separation or Divorce</u>	Your parents or you separated or divorced after filing 2021 taxes	<input type="checkbox"/> 2021 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> Divorce decree/separation agreement or proof of separate addresses. <input type="checkbox"/> Documentation showing division of all other income shown on tax return. <input type="checkbox"/> Signed statement detailing special circumstances. <input type="checkbox"/> 2023-24 Verification Worksheet (on our Financial Aid Forms page)
<input type="checkbox"/> <u>Death of a Parent or Spouse</u>	A parent or spouse died after filing 2021 taxes	<input type="checkbox"/> 2021 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> Documentation showing division of all other income shown on tax return. <input type="checkbox"/> Applicable death certificate. <input type="checkbox"/> Signed statement detailing special circumstances. <input type="checkbox"/> 2023-24 Verification Worksheet (on our Financial Aid Forms page)
<input type="checkbox"/> <u>Medical/Dental Expense</u> <ul style="list-style-type: none"> ➤ Only <u>paid</u> excessive medical/dental expenses not covered by insurance can be reported. ➤ Expenses must exceed 11% of a family's adjusted gross income to be considered. 	Paid 2021 or 2022 medical expenses	<input type="checkbox"/> 2021 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> Proof of all out-of-pocket paid expenses for 2021. OR <input type="checkbox"/> 2022 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2022 W-2 wage statements for all. <input type="checkbox"/> Proof of all out-of-pocket paid expenses for 2022. <input type="checkbox"/> Signed statement detailing special circumstances. <input type="checkbox"/> 2023-24 Verification Worksheet (on our Financial Aid Forms page)
<input type="checkbox"/> <u>One Time (Lump Sum) Payment Received</u>	A one-time, lump sum payment was received in 2021 or in 2022	<input type="checkbox"/> 2021 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2021 W-2 wage statements for all. <input type="checkbox"/> 2022 signed Tax Return 1040 and all schedules. <input type="checkbox"/> 2022 W-2 wage statements for all. <input type="checkbox"/> Lump Sum Payment Received Form <input type="checkbox"/> 2023-24 Verification Worksheet (on our Financial Aid Forms page)