2023-2024 SPECIAL CIRCUMSTANCES APPEAL INFORMATION

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

<table>
<thead>
<tr>
<th>I filed my FAFSA and received an Expected Family Contribution (EFC) of Zero (0)</th>
<th>You are already receiving the maximum in federal aid. Submitting this form will not result in any changes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I filed my FAFSA and received an Expected Family Contribution (EFC) significantly higher than 7000</td>
<td>Submitting an appeal may result in either no change or a change to a partial subsidized student loan rather than all unsubsidized. <em>Note: to be eligible for a Federal Pell Grant, your EFC must be 6200 or less.</em></td>
</tr>
<tr>
<td>I am appealing for more NY State aid (TAP grant or NY State scholarships)</td>
<td>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.</td>
</tr>
<tr>
<td>I have excessive out-of-pocket medical expenses</td>
<td>We can only consider an appeal for PAID medical expenses that exceed 11% of your family’s AGI in the year they were incurred.</td>
</tr>
<tr>
<td>I am a NY State Excelsior Scholarship recipient</td>
<td>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.</td>
</tr>
</tbody>
</table>

*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

<table>
<thead>
<tr>
<th>Loss of Income or Employment in 2022</th>
</tr>
</thead>
</table>
| - 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

### REQUIRED DOCUMENTATION

- 2021 IRS Data Retrieval or signed Tax Return 1040 and all schedules.  
- 2021 W-2 wage statements for all.  
- 2022 signed Tax Return 1040 and all schedules.  
- 2022 W-2 wage statements for all.  
- Documentation showing loss of income for 2021 including revised benefits statement(s).  
- Signed statement detailing special circumstances.  
- **2023-24 Verification Worksheet** (on our Financial Aid Forms page)

*if due to loss of business income, submit quarterly IRS form 1040-ES or contact our office for further instructions.

### Loss of Income or Employment in 2023*

<table>
<thead>
<tr>
<th>Loss of Income or Employment in 2023*</th>
</tr>
</thead>
</table>
| - Wages/Employment  
- Business Income  
- Alimony  
- Child Support  
- Retirement/Pension  
- Social Security (taxed)  
- Worker’s Compensation |

Income/benefits in 2023 will be less than that in 2021 and 2022

### REQUIRED DOCUMENTATION

- 2021 IRS Data Retrieval or signed Tax Return 1040 and all schedules.  
- 2021 W-2 wage statements for all.  
- Documentation of Business Income for calendar year*  
- If loss of employment, documentation showing loss of employment in 2023. Include:  
  - Final paystub showing YTD earnings.  
  - Termination notice from employer.  
  - Unemployment benefits notice.  
- Revised benefit statement(s), if applicable.  
- Most recent paystub showing 2023 YTD earnings for both parents, if applicable.  
- Signed statement detailing special circumstances.  
- **2023-24 Verification Worksheet** (on our Financial Aid Forms page)

* if due to loss of business income, submit quarterly IRS form 1040-ES or contact our office for further instructions.

### Separation or Divorce

- Your parents or you separated or divorced after filing 2021 taxes

### REQUIRED DOCUMENTATION

- 2021 signed Tax Return 1040 and all schedules.  
- 2021 W-2 wage statements for all.  
- Divorce decree/separation agreement or proof of separate addresses.  
- Documentation showing division of all other income shown on tax return.  
- Signed statement detailing special circumstances.  
- **2023-24 Verification Worksheet** (on our Financial Aid Forms page)

### Death of a Parent or Spouse

- A parent or spouse died after filing 2021 taxes

### REQUIRED DOCUMENTATION

- 2021 signed Tax Return 1040 and all schedules.  
- 2021 W-2 wage statements for all.  
- Documentation showing division of all other income shown on tax return.  
- Applicable death certificate.  
- Signed statement detailing special circumstances.  
- **2023-24 Verification Worksheet** (on our Financial Aid Forms page)

### Medical/Dental Expense

- Only paid 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**

### REQUIRED DOCUMENTATION

- 2021 signed Tax Return 1040 and all schedules.  
- 2021 W-2 wage statements for all.  
- Proof of all out-of-pocket paid expenses for 2021.  
- 2022 signed Tax Return 1040 and all schedules.  
- 2022 W-2 wage statements for all.  
- Proof of all out-of-pocket paid expenses for 2022.  
- Signed statement detailing special circumstances.  
- **2023-24 Verification Worksheet** (on our Financial Aid Forms page)

### One Time (Lump Sum) Payment Received

- A one-time, lump sum payment was received in 2021 or in 2022

### REQUIRED DOCUMENTATION

- 2021 signed Tax Return 1040 and all schedules.  
- 2021 W-2 wage statements for all.  
- 2022 signed Tax Return 1040 and all schedules.  
- 2022 W-2 wage statements for all.  
- **Lump Sum Payment Received Form**  
- **2023-24 Verification Worksheet** (on our Financial Aid Forms page)

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Code: SPCIRC  
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Revised: 12/1/2022