

# Special Circumstances Appeal 2024-2025



Name \_\_\_\_\_ Phone \_\_\_\_\_ Dragon ID \_\_\_\_\_

Address \_\_\_\_\_

Students have the option to file a Special Circumstances Appeal when their financial situation has significantly changed and 2022 tax information as reported on the 2024-2025 Free Application for Federal Student Aid (FAFSA) does not accurately reflect their current financial condition. Appeals are reviewed by a committee and based on professional judgment. Additional information may be requested. Appeals may be approved, denied, or tabled for review later in the academic year.

## Required Documentation for All Appeals

- A completed 2024-2025 Free Application for Federal Student Aid, AND
- A signed letter clearly explaining the special circumstance, AND
- A signed copy of the student's and parents' (and spouse's, if married) 2022 and 2023 federal income tax return (with all schedules) and W-2s.

## Appeal Circumstances and Additional Documentation

### ☐ Involuntary loss of employment or pay reduction

- o Termination/separation letter
- o Documentation of severance package
- o Final earnings statement from the previous employer
- o Unemployment benefit notice

### ☐ Significant medical or dental expenses not covered by insurance for those in the FAFSA family size

**NOTE: Expenses incurred but not paid do not qualify for consideration**

- o Copies of billing statements from the medical or dental provider(s) and proof of payment OR a copy of the 2022 Schedule A
- o Expenses paid that are not reported on the 2022 Schedule A

### ☐ One-time income received in 2022 that will not be received in 2023 and/or 2024

- o Document the final payment and total amount received in 2022

### ☐ Conversion of a regular IRA to a Roth IRA by transferring funds in 2022

### ☐ Death of a parent or spouse after the FAFSA was submitted

- o Copy of the death certificate or obituary

### ☐ Divorce or separation after the FAFSA was submitted

- o Copy of legal separation/divorce agreement (court-issued or letter from attorney)
- o Proof of separate addresses (i.e. utility bills, lease)

### ☐ Budget adjustments

- o The standard budget reflects the average cost of tuition and fees; books, course materials, supplies, and equipment; living costs; and personal and incidental expenses including a transportation allowance. Only extraordinary educational expenses that occur during the academic year and substantially exceed those allowed in the standard budget are considered. Receipts or purchase invoices are required.
- o Examples of expenses that may be considered:
  - ☐ Computer purchase
  - ☐ Musical instrument (majors only)
  - ☐ Costs associated with a disability not covered by insurance or another agency
  - ☐ Books, course materials, supplies, and equipment in excess of allowance
  - ☐ Cost of first professional credential

### ☐ Other

- o Any circumstance not listed above

Provide an explanation of your special circumstance. Include information about any anticipated income. Attach additional pages as needed.

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## Timeline

The initial review of your appeal will take place within 20 business days of receipt. Requests for additional documentation may extend the processing time. Appeals submitted August through September may take up to eight weeks to review.

## Certification and Signatures

This appeal must be signed by the student and at least one parent whose information is reported on the 2024-2025 FAFSA.

- I/We certify that all of the information provided is true and complete to the best of our knowledge.
- I/We understand that failure to provide any documentation as requested will result in denial of this application.
- I/We understand that any misrepresentation of the facts in connection with this appeal may be sufficient cause, in and of itself, for cancellation or repayment of financial aid, whenever discovered.

Student \_\_\_\_\_ Parent \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

**RETURN THIS COMPLETED AND SIGNED FORM TO:**

Minnesota State University Moorhead • Office of Scholarship and Financial Aid • MSUM Box 90 • 1104 7th Avenue South • Moorhead, MN 56563  
Phone: 218.477.2251 • Fax: 218.477.2058 • E-mail: [financialaid@mnstate.edu](mailto:financialaid@mnstate.edu)