

Special Circumstance Application

Name _____ Banner Id (or SS#) _____

Phone: _____ (current home/cell)

Sometimes the Free Application for Federal Student Aid (FAFSA) does not adequately reflect a family's financial situation due to extenuating circumstances. BSC 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 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.

How many children need full-time childcare? _____ What are their ages? _____

How many children need after school childcare? _____ What are their ages? _____

Estimated total weekly cost \$ _____

___ 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 October 1, or February 15 respectively. No adjustments will be made without the verification of enrollment. Parents must be seeking a degree to qualify.

For conditions 3 – 7 you must also complete the attached Verification Worksheet and supply signed copies of 2008 federal income tax forms and W-2 forms as detailed on the back of the worksheet. If you already submitted the Verification Worksheet or tax forms this year you do not need to submit duplicate copies.

___ 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 2009-2010 school year that show the net cost (minus scholarships).

___ 4. **Cessation of benefits** – in cases where benefits such as child support or Social Security Survivor's Benefits (SSI) 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 distributions** – 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 at the present time (e.g. savings account, investments). _____

___ 6. **Unusually high medical expenses** – Families 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 2008 or 2009 (**circle one**), we will have the following out of pocket medical charges:

Dr.'s bills	\$ _____	Insurance premiums	\$ _____
Dental/Orthodontia bills	\$ _____	Eye Care	\$ _____
Prescriptions	\$ _____	Hospital Care/Lab Work	\$ _____

___ 7. **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. Give full details. Attach a separate sheet if necessary.

___ I have described the special circumstances in detail in the space above.

___ I have submitted the 2009 – 2010 Verification Worksheet for conditions 3 – 7.

___ I have enclosed signed copies of my family's 2008 federal tax forms including W-2's for conditions 3 - 7.

___ I also understand that the Financial Aid Office can request additional documentation prior to making a decision regarding this request. All decisions are final and at the discretion of the financial aid staff of Buffalo State College.

Student Signature _____

Date _____

Buffalo State College's 2009-2010 Verification Worksheet

Also submit year 2008 copies of:
 Parent Tax Return – must be signed copy
 Parent W2's - (if self-employed, schedule C and /or E)
 Student - Dep. or Indep. - Tax Return – must be signed copy
 Student - Indep. - W2's - (if self-employed, schedule C and /or E)

Your application was selected for review in a process called "verification." In this process, we are required to compare the information from your application with the information provided on this form and the requested tax forms. If there are differences between your application and the documents you've submitted, corrections may need to be made. **We cannot process your financial aid until verification has been completed, so please provide the required documents as soon as possible.**

What you should do:

1. Collect the requested financial documents listed above.
2. Complete all sections and sign the worksheet (and your parent if you are required to provide their income information).
3. Contact us with questions about completing this worksheet.
4. Bring or mail the completed worksheet, tax forms, and any other documents to our office (address below).
5. We will compare the information on these documents and make corrections if necessary.

A. Student Information

Last Name	First Name	M.I.	Banner ID (or SS#)	
Address (include apt. #)		City	State	Zip Code
Date of Birth	() -	Home Phone Number		() - Student's Cell Phone Number

B. Family Information

- Independent Students:** *List below the people in your household, include: (a) yourself, and your spouse* if you have one; **(b) your children**, if you will provide more than half of their support from July 1, 2009 through June 30, 2010; and **(c) other people** if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010. **(d)** Also write in the name of the college for any family members who will be attending college at least half time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.
- Dependent Students:** *List below the people in your parents' household, include: (a) yourself and your parent(s)* (including stepparent) even if you don't live with your parents; **(b) 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, 2009 through June 30, 2010, or (2) the children would be required to provide parental information when applying for federal student aid; and **(c) 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, 2009 through June 30, 2010. **(d)** Also write in the name of the college for any family member, excluding your parents, who will be attending college, at least half-time between July 1, 2009 and June 30, 2010, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

If a sibling listed below is 24 years of age or older or if someone who fits category (c) "other people" is listed please have your parent (or you if you are considered independent) submit a signed statement testifying that they meet all the criteria described above.

Full Name	Age	Relationship	College
<i>Example: Missy Jones</i>	<i>24</i>	<i>Wife</i>	<i>City University</i>
		Self	

Over ►►►

C. Tax Forms and Income Information

1. All students, their spouses and the parent's of dependent students must submit signed copies of their 2008 federal income tax returns if they filed taxes for that year. Independent students, their spouses and the parents of dependent students must also submit W-2's from all employers and Schedule C or E if self-employed. Check the box below for the people whose tax returns are being submitted. Tax returns include the 2008 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

- Student
 Student's Spouse
 Father (step)
 Mother (step)

If you don't have a copy of your tax return or W-2's we can accept a tax transcript or W-2 transcript (option 1 only) instead:

Option 1 - Complete fill able Form 4506T at: <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>. Option 2 - Call the IRS at 1-800-829-1040, press 2 "For questions about your refund, payment or account", then press 2 "for questions about your tax account". Enter your social security number (answer prompts) then press 3 "to request a transcript of your tax return", verify your address (answer prompt), listen to message, then press 4 to receive "a transcript of your account and a transcript of your tax return". Enter the tax year you are requesting, press 1 and your transcript should arrive within 10-15 days from the IRS.

2. Check the box for those people who did not and are not required to file a 2008 Federal Income Tax Return. List below all employers and any income received in 2008 (use W-2 forms or other earning statements).

- Student
 Student's Spouse
 Father (step)
 Mother (step)

Name of Employer	Student Amount	Spouse or Parent(s) Amount

3. Both tax filers and non-tax filers must list any untaxed income received in 2008. To prevent delays in processing be sure to enter zeros below if no funds were received.

Calendar Year 2008 (be sure to list amounts for the full year)	Student	Parent(s) (step-parent)
	Include SPOUSE if you are married	OF DEPENDENT students only
Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children listed 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.	\$	\$
Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	\$	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q.	\$	\$
Child support received for all children. Don't include 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).	\$	\$
Veterans' noneducation benefits, such as Disability, Death Pension or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$	\$
Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Workforce Investment Act educational benefits, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$
Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$	XXXXXXXX

D. Sign This Worksheet - By signing this worksheet, I (we) certify that all the information reported on this worksheet 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