

2023-2024 INDEPENDENT SPECIAL CIRCUMSTANCES APPEAL

Student Name (please print) _____

Campus ID Number _____

Spouse's Name if applicable (please print) _____

Phone Number (including area code) _____

Who should submit this form?

Independent students who have unusual circumstances that exist that may warrant reconsideration of financial aid eligibility. These special circumstances may be either changes that have occurred in your family since you filed the Free Application for Federal Student Aid (FAFSA) or unusual family circumstances not accounted for on the FAFSA. **NOTE:** Filing this appeal does not guarantee additional financial aid.

When should this form be submitted?

Submit the 2023-2024 Independent Special Circumstances Appeal and all required documentation no later than **March 1, 2024**.

Incomplete forms or missing documentation will be denied. Please allow 4 to 6 weeks for processing.

What circumstances qualify for an independent special circumstances appeal?

The situations outlined on this form are circumstances that normally qualify a student to file a Special Circumstances Appeal. If your circumstance does NOT fit into one of the situations listed on this form, you may still file the Special Circumstances Appeal and attach a detailed letter explaining your situation. Provide documentation to support your circumstance and attach all required forms.

Who should not complete this form?

Do not complete this form if your family income for 2022 and/or 2023 will be more than 2021, if you have not filed the FAFSA, or your Expected Family Contribution (EFC) is zero; as indicated on the results of your FAFSA.

Please check the box(es) next to the situation(s) that apply to you.

Situation:

Required Documentation:

Loss of Income

Reduction or loss of income from work must be for **at least ten (10) weeks** in 2022 or 2023.

- A detailed letter explaining your particular situation.
- A copy of **both** your and your spouse's (if applicable) 2022 W-2 Forms.
- A **signed** copy of your and your spouse's (if applicable) 2022 IRS Tax Return Form 1040 including any applicable Schedules: 1, 2, and 3.
- If submitting after January 1, 2024, a copy of **both** your and your spouse's (if applicable) 2023 W-2 Forms.

Student

Date of layoff/termination: _____

- A letter from employer verifying loss of employment including effective date.

Did you receive unemployment benefits?

- No Yes

***If yes, provide a copy of unemployment determination letter from state agency.**

Did you receive any severance pay?

- No Yes

***If yes, how much? \$** _____

Have you started another job?

- No Yes

***If yes, give start date:** _____
and include most recent pay statement from new job.

Spouse

Date of layoff/termination: _____

- A letter from employer verifying loss of employment including effective date.

Did your spouse receive unemployment benefits?

- No Yes

***If yes, provide a copy of unemployment determination letter from state agency.**

Did your spouse receive any severance pay?

- No Yes

***If yes, how much? \$** _____

Has your spouse started another job?

- No Yes

***If yes, give start date:** _____
and include most recent pay statement from new job.

Student Name (please print)

Campus ID Number

2023-2024 INDEPENDENT SPECIAL CIRCUMSTANCES APPEAL (Continued)

Situation:

Required Documentation:

<input type="checkbox"/> Receipt of One-Time Income in 2021	<input type="checkbox"/> A detailed letter of appeal explaining your particular situation that includes information on what necessary expenses the funds were used for. <input type="checkbox"/> Documentation of the necessary expenses the funds were used for (e.g. receipts, billing statements, etc.). <input type="checkbox"/> A signed copy of your and your spouse's (if applicable) 2020 IRS Tax Return Form 1040 including any applicable Schedules: 1, 2, and 3 or your and your spouse's (if applicable) 2021 Form 1099. <input type="checkbox"/> A signed copy of your and your spouse's (if applicable) 2022 IRS Tax Return Form 1040 including any applicable Schedules: 1, 2, and 3.
<input type="checkbox"/> Death of a Spouse in 2022 or 2023	<input type="checkbox"/> A detailed letter of appeal explaining your particular situation. <input type="checkbox"/> A copy of the death certificate or obituary. <input type="checkbox"/> A copy of your 2021 and 2022 W-2 Form(s).
<input type="checkbox"/> Separation or Divorce in 2022 or 2023 Please note that separation must have occurred at least ten (10) weeks prior to the submission of this request and you must be residing in separate households.	Date of Separation/Divorce: _____ <input type="checkbox"/> A detailed letter of appeal explaining your particular situation. <input type="checkbox"/> A copy of your most recent pay statement. <input type="checkbox"/> A copy of your 2021 and 2022 W-2 Form(s). <input type="checkbox"/> A copy of legal separation/divorce papers/ or proof of separate residence (driver's license, lease agreement, etc.). <input type="checkbox"/> Documentation of spousal support and/or child support, if any.

Certification and Signatures



SIGNATURE REQUIRED: I certify that the information provided on this form is true and complete to the best of my knowledge. I understand that I may be asked to submit additional documentation if necessary. I realize that if I do not fully prove my special circumstance, this form may be denied and that all decisions are final. I understand that approval of submitted special circumstances may not always result in additional funding. I certify that the Office of Scholarships and Financial Aid will be notified if circumstances change.

Student Signature

Date

	2023-2024 Household Size & Number in College Independent Student	VHSI 24
	OFFICE OF SCHOLARSHIPS AND FINANCIAL AID WARRINER HALL 202, MOUNT PLEASANT, MI 48859 PHONE: (989) 774-3674; FAX: (989) 774-3634 HTTPS://FINANCIALAIDPORTAL.APPS.CMICH.EDU	

Why have you received this form? The Federal Processor has selected your Free Application for Federal Student Aid (FAFSA) for a process called "Verification."

When should this form be submitted? Failure to complete and submit this form along with all required documentation to the Office of Scholarships and Financial Aid **within 21 business days** may result in the cancellation of your federal financial aid.

Student Information

Student Name (please print) _____

Campus ID Number _____

Number of Household Members

➤ **List all household members** who meet the following criteria.

Attach a separate sheet, if needed.

- Yourself; and
- Your spouse, if you are married; and
- You and/or your spouse's children from this household; even if they do not currently live with you, **IF**:
 - You or your spouse will provide more than half of their support from July 1, 2023 through June 30, 2024.
- Other people: List **only if they now live with you** and will continue to live with you through June 30, 2024 **AND** only if you and/or your spouse provide/will continue to provide **more than half of their support** through June 30, 2024. Do not include roommates.

Full Name of Household Member	Age Required	Relationship to Student <small>If "Other" is checked, relationship must be indicated.</small>	Will household member attend college at least half-time (6 semester credits/term) in a degree/certificate program between 7/1/23 and 6/30/24? If yes, list name of college.
		Self	Central Michigan University
		Spouse (if married)	<input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____
		<input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____	<input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____
		<input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____	<input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____
		<input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____	<input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____
		<input type="checkbox"/> Child/Stepchild <input type="checkbox"/> Other: _____	<input type="checkbox"/> No <input type="checkbox"/> Yes Name of College: _____

Certification and Signature

 **SIGNATURE REQUIRED:** I certify that the information provided on this form is true and complete to the best of my knowledge. I understand that based on the information provided changes in my FAFSA financial information may occur and may result in a change in financial aid eligibility.

Student Signature _____

Date _____



2023-2024 Income Verification – Independent Student

**VINI
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OFFICE OF SCHOLARSHIPS AND FINANCIAL AID
 WARRINER HALL 202, MOUNT PLEASANT, MI 48859
 PHONE: (989) 774-3674; FAX: (989) 774-3634
 HTTPS://FINANCIALAIDPORTAL.APPS.CMICH.EDU

Why have you received this form? The Federal Processor has selected your Free Application for Federal Student Aid (FAFSA) for a process called "Verification." **When should this form be submitted?** Failure to complete and submit this form with all required documentation to the Office of Scholarships and Financial Aid **within 21 business days** may result in the cancellation of your federal financial aid.

Student Information

Student Name (please print) _____

Spouse's Name if applicable (please print) _____

Campus ID Number _____

Student and Spouse's (if applicable) Income Information

You must indicate the appropriate 2021 IRS Tax Filing Status below for both you and your spouse if you are married. If you and your spouse filed separately in 2021, both student and spouse must provide their corresponding 2021 IRS Tax Filing Status documentation. Please select only one 2021 IRS Tax Filing Status per person.

Student	Spouse (if applicable)	2021 IRS Tax Filing Status and Required Documentation:												
<input type="checkbox"/>	<input type="checkbox"/>	<p>I filed a 2021 IRS Tax Return and have/will complete IRS Data Retrieval (IRS DRT) on the FAFSA to transfer 2021 IRS Tax Return information into the FAFSA and made no changes to the information before submitting 'OR'</p> <p>➤ SUBMIT a signed copy of your 2021 IRS Tax Return Form 1040 including any applicable Schedules: 1, 2, 3.</p>												
<input type="checkbox"/>	<input type="checkbox"/>	<p>I did NOT file and was not required to file a 2021 IRS Tax Return 'AND' earned income from work in 2021.</p> <p>➤ SUBMIT the following:</p> <p><input type="checkbox"/> Copies of ALL your 2021 W-2 Form(s); AND</p> <p><input type="checkbox"/> LIST BELOW every employer you earned income from work in 2021;</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">Name of Student/Spouse</th> <th style="width: 30%;">Name of Employer</th> <th style="width: 30%;">Dollar Amount Earned in 2021</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p><input type="checkbox"/> A copy of your 2021 IRS Verification of Non-Filing Letter dated on or after October 1, 2022;</p> <p><input type="checkbox"/> OR You attempted to obtain your 2021 IRS Verification of Non-Filing Letter and were unable to obtain the required documentation.</p>	Name of Student/Spouse	Name of Employer	Dollar Amount Earned in 2021									
Name of Student/Spouse	Name of Employer	Dollar Amount Earned in 2021												
<input type="checkbox"/>	<input type="checkbox"/>	<p>I did NOT file and was not required to file a 2021 IRS Tax Return 'AND' did NOT earn income from work in 2021.</p> <p>➤ SUBMIT the following:</p> <p><input type="checkbox"/> A copy of your 2021 IRS Verification of Non-Filing Letter dated on or after October 1, 2022;</p> <p><input type="checkbox"/> OR You attempted to obtain your 2021 IRS Verification of Non-Filing Letter and were unable to obtain the required documentation.</p>												

Certification and Signature

SIGNATURE REQUIRED: I certify that the information I have provided on this form and on all documents is true and complete to the best of my knowledge. I understand that based on the documentation provided changes in my FAFSA financial information may occur and may result in a change in financial aid eligibility.

Student Signature _____

Date _____

2023-2024 Tax Document Guide

IMPORTANT: When submitting your IRS tax return or transcript(s) to the Office of Scholarships and Financial Aid make sure you place your student name and campus ID number on each page so we know that it is part of your financial aid record. Not doing so may cause a delay in processing.

Type of Tax Document:	How to Obtain:
<p>Signed IRS Tax Return:</p> <ul style="list-style-type: none"> Submit a copy of your 2021 IRS Tax Return with your signature on page 1 or 2 of your Form 1040 and include any applicable Schedules: 1, 2, and 3. If you filed electronically, print a copy of your IRS Tax Return and sign page 1 or 2 of your Form 1040 before submitting. Do not send your City or State Tax Return. Make a copy of your 2021 IRS Tax Return. Do <i>not</i> send us your only copy. Do not send your Tax Summary Page – Send a copy of your 2021 IRS Tax Return Form 1040. 	<p>Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of your 2021 IRS Tax Return.</p> <p>Online System Request: If you used an online system such as TurboTax or TaxAct then you should be able to log in to the system and pull up a copy of your 2021 IRS Tax Return and print off a copy.</p> <p>Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2021 IRS Tax Return Transcript from the IRS (directions below).</p>
<p>IRS Tax Return Transcript:</p> <ul style="list-style-type: none"> Includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. In some instances, may substitute for your 2021 IRS Tax Return. Make sure to submit a copy of each page of your transcript as many transcripts are double-sided documents and we will need a copy of each page. 	<p>Telephone Request: Call 1-800-908-9946 and make sure to request the “IRS Tax Return Transcript” for tax year ending 12/31/2021.</p> <p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Tax Return Transcript” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then enter your tax form number on line 6 and then check box 6a for “IRS Tax Return Transcript”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p>
<p>Signed Amended IRS Tax Return:</p> <ul style="list-style-type: none"> Submit a signed copy of your 2021 Amended IRS Tax Return Form 1040X. If you filed electronically, print a copy of your IRS Tax Return and sign page 1 or 2 before submitting. 	<p>Request Copy From Your Tax Preparer: Contact your Tax Preparer and request a copy of your 2021 IRS Tax Return.</p> <p>Online System Request: If you used an online system such as TurboTax or TaxAct then you should be able to log in to the system and pull up a copy of your 2021 Amended IRS Tax Return and print off a copy.</p> <p>Don't Have a Copy or Unable to Locate a Copy?: Request a copy of your 2021 IRS Record of Account Transcript from the IRS (directions below).</p>
<p>IRS Record of Account Transcript:</p> <ul style="list-style-type: none"> Includes most of the line items of a tax return as filed with the IRS. As well as reflect changes made to the account after the original return is processed. In some instances, may substitute for your 2021 Amended IRS Tax Return Form 1040X. Make sure to submit a copy of each page of your transcript as many transcripts are double-sided documents and we will need a copy of each page. 	<p>Telephone Request: Call 1-800-908-9946 and make sure to request the “IRS Record of Account Transcript” for tax year ending 12/31/2021.</p> <p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Record of Account Transcript” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then enter your tax form number on line 6 and then check box 6c for “IRS Record of Account Transcript”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p>
<p>IRS Wage and Income Tax Transcript:</p> <ul style="list-style-type: none"> Includes the data from any W-2, 1099 series, 1098 series, or 5498 series forms. May substitute for any 2021 W-2 Form, 1099 Form, 1098 Form, or 5498 Form. 	<p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Wage and Income Tax Transcript” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then check box 8 for “Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p>
<p>IRS Verification of Non-Filing Letter:</p> <ul style="list-style-type: none"> Proof from the IRS that you did not file a return for the tax year requested. IRS Verification of Non-Filing Letters for tax year 2021 must be obtained on or after October 1, 2022. 	<p>Online Request: Go to www.irs.gov and click “Get Your Tax Record” from the IRS homepage. Make sure to request the “IRS Verification of Non-Filing Letter” for tax year ending 12/31/2021.</p> <p>Paper Request: Use IRS Form 4506-T by entering your information at the top of the page on lines 1-5. Then check box 7 for “IRS Verification of Non-Filing”. Then enter the year or period requested (12/31/2021) on line 9. Then you must check the box above the signature to attest that you have the authority to sign and sign, date and add your phone number. Once completed mail or fax to the appropriate IRS contact information on page 2.</p>