

RETURN TO FINANCIAL AID OFFICE:



(FALA73) (FCLA73) (FFLA73) (FSLA73)

2025-2026

SPECIAL CIRCUMSTANCES APPEAL

STUDENT INFORMATION

Last Name

First Name

M.I.

Student ID#

Overview:

Your 2025-2026 financial aid eligibility was determined based upon 2023 income data reported on your Free Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADAA) and the resulting Student Aid Index (SAI). If you have experienced a loss of household income since 2023, the Special Circumstances Appeal Form may be used to document changes in income, such as financial circumstances that may affect the availability of family resources for your educational expenses. Personal expenses for lifestyle choices and consumer goods (e.g. credit card/loan payments) are not considered unusual or special circumstances. The appeal process may result in a change to data elements reported on your financial aid application resulting in a change to your SAI. If your appeal is approved, any changes to your award will be effective for the 2025-2026 aid year. The Financial Aid Office's decision is made on a case-by case basis, will be final, and cannot be appealed to the U.S. Department of Education.

Instructions:

Complete this form only if your (or your parent(s), if you are a dependent student) income will be **less** in 2024, 2025, or 2026 than the 2023 income reported on your 2025-2026 application. **IMPORTANT:** If the tax information reported on the FAFSA or CADAA was underestimated, submissions and evaluation of the Special Circumstances Appeal Form may result in a decrease in financial aid.

Dependent students must submit documents for both student and parent(s).

Independent students must submit documents for both student and spouse (if married).

1. Detailed Statement.

On a separate typed document, the student must provide a detailed statement that includes the following:

- The reason you are requesting a professional judgment.
- Extenuating circumstances that qualify you to request a professional judgment.
 - Provide specific start and end dates of these circumstances.
 - Be specific about the types of unusual expenses.
- Any additional information that would substantiate your extenuating circumstance.

2. Required Documentation.

Provide the required items below if applicable:

- 2023 and 2024 IRS Tax Transcript or signed 1040's AND all schedules, W-2's, 1099's and 1099R.
- After January 31, 2026, 2025 IRS signed 1040 and schedules, W-2's, 1099's, and 1099R.

3. Additional Supporting Documentation.

Submit all documentation that applies to you and your family.

- **Recent Job Loss, Past Job Loss, or Under Employed**

- List of required documents, if applicable:
 - Job termination letter/email.
 - Unemployment received due to job loss.
 - State Disability Insurance (SDI).
 - Current paystubs (if any).
 - Current assets.
 - Any untaxed income.

- **Change in income due to: ONE TIME disbursement of additional funds such as Pension/IRA distribution, divorce settlement, child support ending, inheritance settlement, death of parent/spouse during 2023 or 2024 tax year.**
 - List of required documents, if applicable:
 - Proof of how funds were utilized (debt payments, bank statements, written statements).
 - Child support court documents.
 - Death certificates/divorce court documents.
 - Current assets/any untaxed income.
- **Change in disposable income due to additional expenses such as high medical expense or nursing home expense not covered by insurance, elementary or secondary educational expenses, childcare, and home foreclosure.**
 - The time period that is appropriate per circumstance:
 - 2023 tax year.
 - 2024 tax year.
 - Projected: January 2025 to December 2025.
 - Projected: July 01, 2025 to June 30, 2026.
- **List of suggested documents for change in disposable income due to additional expenses such as high medical expense or nursing home expense not covered by insurance, elementary or secondary educational expenses, childcare, or home foreclosure:**
 - Proof of expenses: childcare contract, medical bills, tuition statements, mortgage foreclosure.
 - Current assets.
 - Any untaxed income.

CHECKLIST FOR SUBMITTING YOUR SAI APPEAL

- ☐ Select the Special Circumstances pertaining to your appeal
 - ☐ Financial changes between base year and current year
 - ☐ High medical or educational expenses
 - ☐ One time disbursement of 401K or investment funds
 - ☐ Cost of attendance
- ☐ Attach a detailed statement explaining the change in circumstances since 2023
 - The reason you are requesting a professional judgment.
 - Extenuating circumstances that qualify you to request a professional judgment.
 - Provide specific start and end dates of these circumstances.
 - Be specific about the types of unusual expenses.
 - Any additional information that would substantiate your extenuating circumstances.
- ☐ Attach supporting documentation*
- ☐ Sign and submit this Special Circumstances Appeal form

*Please refer to the instructions sections to ensure you submit supporting documentation. Note: The Financial Aid Office may request additional documentation on a case-by-case basis.

CERTIFICATION AND SIGNATURE

- I certify that all the information reported is true and correct.
- I understand that the Financial Aid Office may request additional documentation to verify the information provided.

WARNING: If you purposely give false or misleading information on this worksheet you may be fined, sentenced to jail, or both.

Student Signature: _____

Date: _____

Parent Signature: _____

Date: _____

Note: If you are a dependent student, your parent must also sign this form.