



2024-2025

Special Circumstance Appeal Form

9

Student's Name

Student's MSU Net ID

MSU ID (9 digit)

Complete this form if you/your family have unusual circumstances that may affect your ability to contribute to your 2024-2025 educational expenses. We will consider appeals for Employment Loss; Death; Divorce/Separation; Excessive Medical expenses. We will re-evaluate your financial aid eligibility for possible adjustment, post additional documentation requirements as needed, and post a correction (if adjustments are made). An appeal may only be completed for those included on your 2024-2025 FAFSA.

- **Special Circumstances Appeals are limited to one per academic year (Fall/Spring/Summer).**
- **Additional documents may be required when our appeal committee evaluates your appeal.**
- **To check the status or see requests for any documents, log in to your MSU myState and check Eligibility Requirements; you can also see this under your MSU email address.**
- **Appeal will be delayed if ALL documents required and requested are not signed and submitted.**

Documents listed below are REQUIRED for All cases, along with additional documents per circumstance	
<input type="checkbox"/> Typed and signed letter	Explain the circumstance you are appealing for: Job/Income loss, Death, Divorce/Separation, Medical Expenses
<input type="checkbox"/> Completed 2024-2025 Family Size Verification Form	https://www.sfa.msstate.edu/forms/2024-01-01-000000/fsver
<input type="checkbox"/> Signed copy of 1040 or Tax Return Transcript	For 2022 AND 2023 – First 2 pages listing wages and tax paid
<input type="checkbox"/> Copies of ALL Schedules (Sch) Filed	For 2022 AND 2023 – Sch 1, 2, 3, A, C, and D, K-1 (Form 1065)
<input type="checkbox"/> Copies of ALL W-2 and/or 1099 Forms	For 2022 AND 2023 • W-2/1099 wages must match 1040/transcript wages
Provide the following if unable to provide 2023 documents listed above (2022 still required):	
<input type="checkbox"/> 2023 Tax Return not yet filed – 2023 most current 3 month's pay stubs (must show gross year-to-date earnings)	
<input type="checkbox"/> Requesting to use 2024 income – 2024 most current 3 month's pay stubs (shows gross year-to-date-income)	

Reason for Appeal – Answer questions and provide documents specific to your situation:

1. Employment Loss – layoff/termination/job change that resulted in income reduction since 2022 :		
Name of person who experienced the loss:	Company Name where loss occurred:	Date loss started:
Relationship to student (check box):	<input type="checkbox"/> Parent 1 <input type="checkbox"/> Parent 2 <input type="checkbox"/> Student <input type="checkbox"/> Student's Spouse	
Did/will this person receive unemployment:	<input type="checkbox"/> No <input type="checkbox"/> Yes (Unemployment Benefit Statement required)	
Is this person currently employed?	<input type="checkbox"/> No <input type="checkbox"/> Yes (new employ start date): _____ If yes, list company name:	
Was loss voluntary?	<input type="checkbox"/> No <input type="checkbox"/> Yes	
Additional Documentation Required:		
<input type="checkbox"/> Termination/separation letter (Employer signed) and copy of severance package (if severance received)		
<input type="checkbox"/> Copy of Unemployment Benefits Statement (if unemployment received)		

MSU ID (9 digit) 9 _____

2. Death – if death occurred in 2022 or later – (not considered if death was prior to 2022):		
Name of deceased parent or spouse:	Relationship to the student: <input type="checkbox"/> Parent <input type="checkbox"/> Spouse	Date death occurred:
Additional Documentation Required: <input type="checkbox"/> Copy of Death Certificate or full Obituary		

3. Divorce or Separation – must occur <u>AFTER</u> FAFSA has been submitted:	
Name of Custodial Parent <u>on FAFSA</u> is:	
As of TODAY, Custodial Parent is (only check one):	
<input type="checkbox"/> Divorced from student's biological/adoptive parent	<input type="checkbox"/> Divorced from student's stepparent
<input type="checkbox"/> Separated from student's biological/adoptive parent	<input type="checkbox"/> Separated from student's stepparent
Date of Divorce:	Date:
Date of Separation (if not divorced): Temporary absences from home are not considered	Date:
Additional Documentation Required:	
1) Divorced – copy of divorce decree	
2) Separated – signed letter from lawyer specifying separation with intent to divorce, if none, then:	
a. Copies of current utility bills or lease agreements in BOTH parent's names OR student/spouse's names to verify separate addresses (REQUIRED to proceed)	
3) If all of the 2022 income is other Parent's, provide copies of their W-2 and/or 1099 Forms if available	

4. Excessive Medical Expenses – paid out-of-pocket in 2022 or 2023 only:	
Name of person who had excessive medical expenses:	
Year medical expenses occurred:	<input type="checkbox"/> 2022 <input type="checkbox"/> 2023
Additional Documentation Required:	
1) 2022 copy of Schedule A required – shows eligible medical expenses paid that exceeds 11% of IPA.	
a. FAFSA already includes 11% of the Income Protection Allowance (IPA) for medical expenses	
2) If 2023 not filed, provide copy of the 2023 medical payments you paid out of pocket over what insurance paid.	
a. Include total owed, total paid by insurance, and total you paid in 2023	

REQUIRED Signatures:

By signing this form, I certify that all the information on this form and any attachments are complete and accurate to the best of my knowledge. *Warning: Purposely giving false or misleading information may result in a fine, imprisonment, or both.*

Handwritten signatures required – no initials or electronic signatures.

DEPENDENT students – Both Student and Parent signatures are required.	
Student Signature _____	Date _____
Parent Signature _____	Date _____

INDEPENDENT students – Student and Spouse signatures are required (if married).	
Student Signature _____	Date _____
Student's Spouse Signature _____	Date _____