

## Special Circumstances SAI Appeal Guide

### ALL appeals must include the following:

- A signed explanation of your special circumstances (online webform through our [appeal website](#)).
- Most recent signed IRS 1040 Tax Return including all Schedules 1, 2 & 3 and W-2's, if applicable.
- Documentation for the option(s) below that best fit your circumstances. If you are unable to provide specified documents, please provide a reasonable alternative.

<p><b>Recent Loss of Income from Wages</b></p> <p><b>To document loss of employment:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> If laid off, letter of termination from employer and copy of final earnings statement (paystub)</li> <li><input type="checkbox"/> Notice of unemployment insurance award from the Employment Development Department (EDD)</li> </ul> <p><b>If you have reestablished employment or reduction of wages:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Most current wage statement (paystub) from tax filer whose employment changed</li> </ul>	<p><b>Loss of Self-Employment Income</b></p> <p><b>To document loss of employment:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Letter explaining the reason for loss of income compared to the FAFSA/CADAA tax year</li> </ul> <p><b>To determine income to be excluded:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule C from most recent IRS Tax Return, if filed, or statements of projected annual net business income</li> </ul>
<p><b>Divorce or Separation or Death of a Parent/Spouse</b></p> <p><b>To document absence of parent:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Divorce Decree or Proof of Marital Separation or Copy of Death Certificate</li> <li><input type="checkbox"/> If no legal proof of separation – provide documentation verifying that parents maintain separate households. For example, utility bills, rental leases, etc.</li> </ul> <p><b>To determine new annual income:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> All W-2's from most recent tax return for both parents, and recent pay stubs if income changed</li> <li><input type="checkbox"/> Any additional support to be considered (life insurance, death benefits or pension plan, spousal support, child support, etc.)</li> </ul>	<p><b>Out-of-Pocket Medical Expenses Not Covered by Insurance</b></p> <p><b>To determine expenses to be excluded:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule A from your most recent Federal Tax Return or the FAFSA/CADAA tax year</li> <li><input type="checkbox"/> If you did not file a Schedule A, provide receipts or billing statements from medical provider(s) or an <a href="#">itemized statement</a> listing expenses not covered by insurance.</li> </ul> <p><b>Loss of Child Support</b></p> <p><b>To determine support to be excluded:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Court/legal documentation verifying date the child support ends</li> </ul>
<p><b>Out-of-Pocket Educational Expenses for Siblings</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Proof of out-of-pocket educational expenses paid, such as billing statements from the sibling's college or student account history</li> </ul>	<p><b>One-Time Unexpected Early Withdrawal from Retirement/Pension/Annuity</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1099-R for the FAFSA/CADAA tax year</li> </ul>