



**SPECIAL CIRCUMSTANCES APPEAL  
2023-2024**

Financial Aid Office  
Phone: (208) 524-3000 ext.7  
Toll Free: 1-800-662-0261  
Fax: (208) 525-7026  
[financial.aid@cei.edu](mailto:financial.aid@cei.edu)  
1600 S. 25<sup>th</sup> E. Idaho Falls, Idaho 83404

First Name	Last Name	Student ID	Last 4 SSN	Phone Number
			XXX-XX	

**YOU ARE REQUIRED TO FILE A 2023-2024 FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA) AND BE AWARDED BEFORE SUBMITTING THIS FORM TO THE FINANCIAL AID OFFICE.**

The Higher Education Act and associated federal regulations give financial aid administrators the authority to adjust an individual student's federal aid application based on special circumstances within the household. The Financial Aid Office will review, and when appropriate, adjust a student's institutional, state and federal aid when a student, spouse, or parent has demonstrated a decrease in income for 2022 or 2023. We reserve the right to delay review, until the end of the calendar year, any appeal where reasonable projections cannot be made. Incomplete forms or missing documentation will not be processed.

- ❖ Projected income (2023) will only be accepted from July 1, 2023-November 30, 2023.
- ❖ Income documentation must reflect Year to Date income from January 1<sup>st</sup>, 2023 to date appeal submitted.
- ❖ Please allow 3-4 weeks for processing. *Incomplete forms will not be processed.*

**REASONS TO APPEAL:**

**Circumstances that can be considered for appeal:**

- Unemployment or change in employment
- Unusual medical or dental expenses
- Excessive debt related to business or unemployment
- Non-recurring income
- Birth, death, separation, divorce, or disability
- Loss of income due to natural disaster

**Circumstances which will not be consider for appeal:**

- Car payments or car insurance
- Consumer debt (credit cards)
- Mortgages and rent
- "Parents will not help pay for college"
- Home equity loans

**Independent Students:** *You must provide information for yourself and your spouse (if married).*

**Dependent Students:** *You must provide information for yourself and your parent(s).*

**SECTION 1: Checklist- Submit the following information for your appeal.**

I, the student, have completed the **2023-2024** Free Application for Federal Aid (FAFSA) and I have received a financial aid offer from CEI. I have reviewed my financial aid on CEI Student Self- Service.

I have completed **Section 4**, (Statement of Explanation) indicating the reasons for reduction in income. Attach any required supporting documentation.

Complete the **2023-2024 Verification Form** <http://www.cei.edu/financial-aid/forms-links>  
**After 11/30/ 2023**, I understand I must submit my 2023 Federal Tax Return and 2023 W-2 (wage statements) for the student and spouse {if married} or student and parents {if Dependent}

Mark the box to indicate the person(s) with the income reduction(s) or unusual expenses.  
 **Student**  **Spouse**  **Parent(s)** (Father/Stepfather, Mother/Stepmother)

**Schedule an appointment with a Financial Aid Counselor.** Call the Financial Aid Office at (208)535-5374 or (208)535-5311. The Financial Aid Office is located in John E. Christofferson Building #3.  
Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_

**You must bring your completed special circumstance form and required documentation to your appointment. Your special circumstances will not be considered unless you provide adequate, appropriate documentation.**

**WARNING: If you purposely provide false or misleading information, you may be subject to a fine, imprisonment, or both.**

<b>Financial Aid Office Use Only</b>	<input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Not eligible	Date Received:
CPS Correction <input type="checkbox"/> Date:	Old EFC:	New EFC:
Corrections CPS:	Awarded <input type="checkbox"/> Date:	Email notification <input type="checkbox"/>
Comments:	Processed By:	Date:

**SECTION 2: Select One Income Year to be used to re-evaluate financial aid eligibility for the student.**

**Mark all boxes that apply. All required documentation must be submitted with this form. Further, CEI reserves the right to request additional documentation upon review. Documentation provided must include student and spouse if married or parent(s) if dependent.**

\*\*\*Tax transcripts can be obtained from the IRS at <http://www.irs.gov/Individuals/Get-Transcript> or by calling 1-800-908-9946.

I would like to use **2022 Tax Year** to have my financial aid re-evaluated.

**Provide the listed documents & complete Section 3 & 4, SKIP Section 5.**

- Provide a copy of **2021 and 2022** IRS Tax Return Transcripts.  
 • Provide **2022** W-2's (Wage Statements from employer)

I would like to use **(Projected Income) 2023 Tax Year** to have my financial aid re-evaluated.

**Provide the following documents & complete Section 3, 4 & 5.**

- Provide Statement(s) of Year-To-Date income from all employers during 2023 for student, spouse and/or parent (if applicable). Attach documentation of all actual income (e.g. recent pay stubs with year-to-date earnings, final paystub, W-2 forms, a letter from employer stating total earnings and future income, etc.  
**\*Year to Date income must reflect from January 1, 2023 to most recent paystub upon submission of appeal.**

Appeals submitted after **November 30, 2023** will require a copy of your 2023 IRS Tax Return Transcript & 2023 W-2's

**SECTION 3: Please indicate the reason(s) for the change in income and provide the required documentation.**

**Loss of Income from Work:**

- Layoff -Provide a letter from employer stating effective date and anticipated return.  
 Termination- Provide a letter from employer stating effective date. (If unavailable, documentation from unemployment office.)  
 Business Closure- Provide a letter from employer stating effective date or unemployment application.  
 Quit or reduced employment to attend school- Provide a letter from employer stating effective date.  
 Were self-employed but are now unemployed due to economic conditions or natural disaster- Statement.  
 Loss of unemployment- Statement or documentation to support. Statement showing total benefits received.  
 Loss of Disability- Date: (mm/dd/yyyy) \_\_\_\_\_. Attach documentation for disability.

**Loss of Taxable Income:**

- Alimony- Provide court document(s) stating termination date of benefit.  
 Unemployment- Provide a letter from the unemployment office stating termination date of benefit.

**Loss of Untaxed Income:**

- Child support- Provide a letter or court document stating termination date or a reduction in benefits.  
 Worker's compensation- Provide a statement showing total benefits received and termination date.

**Divorce or Separation-** Since applying for financial aid, you or your parent(s) have been divorced or separated

- Date of divorce: (mm/dd/yyyy) \_\_\_\_\_. Give only your information when completing section 4. Attach a copy of the divorce decree, and a signed copy of your 2021 Federal Tax Return, and W-2 form(s).  
 Date of separation: (mm/dd/yyyy) \_\_\_\_\_. Give only your information when completing section 4. Provide the current address of spouse and a document showing your different residence, such as a utility bill. Attach a signed copy of your 2021 Federal Tax Return Transcript and W-2 form(s).

**Death of Spouse or Parent-** Since applying for financial aid, your spouse or parent has died.

- Date of death: (mm/dd/yyyy) \_\_\_\_\_. Provide documentation. (death certificate or obituary) Give only your information or surviving parent when completing section 4. Attach a signed copy of 2021 Federal Tax Return Transcript and W-2 form(s).

**One-Time Income-** (i.e. inheritance, moving expense allowance, back year Social Security payments, or lump sum retirement or IRA distribution). You must attach documentation that identifies the source and amount of income and itemize how the funds were spent or invested.

**Unusual Expenses Paid-** You have paid excessive medical, dental, or nursing home expenses for the 2021 calendar year that are not covered by insurance. If you itemized deductions (Schedule A), provide a signed copy of your 2021 Federal Tax Return Transcript. If you did not itemize deductions, provide proof of payment.

**Other-** Please specify and provide appropriate documentation.

\_\_\_\_\_  
\_\_\_\_\_



**SECTION 5: 2023 Tax Year PROJECTED INCOME ONLY (Please Mark Zero for income that does not apply)**

Report all income you have actually received from January 1, 2023 through today. Then estimate all income you expect to receive from today through December 31, 2023. Report your spouse's income (if married) or parents (if dependent).  
**YOU MUST ATTACH DOCUMENTATION OF ALL ACTUAL INCOME.** For acceptable documents see Section 2.

**After November 30, 2023:** Submit a signed copy of your **2023 Federal Tax Return Transcript and W-2's**, complete only the actual column.

	<b>Actual Income Received (Jan. 1, 2023 to Today)</b>	<b>Estimated Income (Today to Dec. 31, 2023)</b>	<b>Total Income Received for (Actual + Estimated)</b>
<b>Taxable Income for January 1, 2023 to December 31, 2023</b>			
Expected 2023 income earned from work by student (wages, salaries) (Parent 1 if applicable)			
Expected 2023 income earned from work by spouse (wages, salaries) (Parent 2 if applicable)			
Business and/ or farm income			
IRS distributions (excluding rollovers)			
Taxable Social Security Benefits			
Unemployment Compensation received			
Other taxable income (dividends, interest, pensions, annuities, alimony, capital gains, rental income, etc.) <b>Specify Source:</b>			
<b>Total Taxed Income for 2023:</b>			
<b>Untaxed Income for January 1, 2023 to December 31, 2023</b>	<b>Actual</b>	<b>Estimated</b>	<b>Total Income</b>
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including but not limited to amounts reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S.			
IRA deductions and payments: To self-employed SEP, SIMPLE, Keogh and other qualified plans.			
Child support received for all children. Don't include foster care/adoption payments.			
Tax exempt interest income			
Untaxed portions of pensions, annuities and IRA distributions			
Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash values of benefits).			
Veteran's Non-Educational Benefits			
Other untaxed income (worker's compensation, disability). <b>Specify Source:</b>			
Money received, or paid on your behalf (e.g., bills, rent, car payment), not reported elsewhere on this form.			
<b>Total Untaxed Income for 2023:</b>			
<b>Additional Financial Information</b>	<b>Actual</b>	<b>Estimated</b>	<b>Total Income</b>
Total of Cash, Savings and Checking Accounts:			
Net worth of Current Investments:			
Net worth of Business/ Investment Farms:			
Child Support <b>paid</b> during 2023 (attach documentation of amount paid):			
Taxable earnings from <b>Federal Work Study</b> or other need-based work programs:			
<b>Total Additional Financial Information for 2023:</b>			

**WARNING: If you purposely provide false or misleading information, you may be subject to a fine, imprisonment, or both.**