



2024-2025 Change in Family Circumstances Appeal

STUDENT NAME: _____ OSU ID: _____

APPEAL PROCESS

The Ohio State University has established an appeal process to allow for adjustments to an individual's information already reported on the 2024-2025 Free Application for Federal Student Aid (FAFSA) due to a change in circumstances/income within the household. If you have experienced a significant decrease in income or life event that has altered your income since completing the FAFSA, then you may submit this appeal form to have your financial aid eligibility reassessed. Before an appeal can be considered, the 2024-2025 FAFSA must be completed at <https://studentaid.gov/h/apply-for-aid/fafsa>.

FAMILY CIRCUMSTANCES THAT CAN BE APPEALED

- Reduced Income/Loss of Wages**
 - Resignation
 - Reduced Employment
 - Layoff
 - Termination
 - Disability
 - Unemployment
 - Worker's Compensation
 - Alimony
- Documents to submit may include but are not limited to:**
- Final paychecks showing year-to-date earnings for both parents
 - Employer termination letter or letter verifying reduction in salary
 - Documentation of severance package
 - Documentation of unemployment payments
 - Documentation of reduction/elimination of benefits received and effective date
 - Court documentation indicating effective date for loss of income

- Documents to submit may include but are not limited to:**
- Divorce decree
 - Letter from attorney indicating separation/divorce
- In cases where legal documentation cannot be provided, submission of alternative documents confirming separation will be accepted and reviewed.

- Documents to submit may include but are not limited to:**
- Death Certificate, newspaper obituary, memorial service program and/or other appropriate documentation.

- Other** [Contact Buckeye Link](#) or your financial aid administrator to discuss your appeal options and documentation.

APPEAL OPTIONS - SELECT ONLY ONE

Please select the option that best characterizes when your loss of income has taken place:

- Income for calendar year 2023 (OPTION 1)**
 - The household experienced a reduction in income, and/or benefits that would be reflected on the 2023 Federal Tax Return or Tax Return Transcript.
 - Complete:
 - Explanation of circumstances
 - Option 1 – Change in Family Circumstances and Income Chart - 2023
- Anticipated income for calendar year 2024 (OPTION 2)**
 - The household experienced a reduction in income, and/or benefits after December 31, 2023 and would be reflected when filing taxes for the 2024 calendar year.
 - Complete:
 - Explanation of circumstances
 - Option 2 – Change in Family Circumstances and Income Chart - 2024

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TO BE COMPLETED FOR OPTION 1: 2023 INCOME FORM

Please report your annual income that was received for calendar year 2023. Report all taxed AND untaxed income amounts received by the STUDENT and student's SPOUSE (if married) or PARTNER for an independent student OR for the STUDENT and both PARENTS (except for separation/divorce/widowed appeals with only one parent) for a dependent student.

Do not leave any item blank. If not applicable, please indicate 0.

TAXED INCOME received for calendar year 2023 (from January 1 - December 31, 2023)	REQUIRED SUPPORT DOCUMENT or FORM	STUDENT	PARENT, or STUDENT'S SPOUSE	PARENT'S SPOUSE or PARTNER
Earnings and Wages from Employment including severance pay (from 2023 W-2 box 1 or IRS W-2 transcript or IRS 1040, line 1z)	2023 W-2 Forms, signed 2023 Federal Tax Form 1040 pages 1 & 2 <u>OR</u> IRS Wage & Income Transcript: https://www.irs.gov/Individuals/Get-Transcript	\$	\$	\$
Interest and Dividend Income (from IRS 1040 page 1, lines 2b and 3b)	Signed 2023 Federal Tax Form 1040 page 1 and 2 including all tax schedules (i.e. schedules 1, 2, 3 or other) <u>OR</u> 2023 IRS Tax Return Transcript using the IRS website at: https://www.irs.gov/Individuals/Get-Transcript	\$	\$	\$
Capital Gains (from IRS 1040 tax return line 7)		\$	\$	\$
Spousal Support/Alimony (from IRS 1040 tax schedule 1, line 2a)		\$	\$	\$
Self-Employment, Business, or Farm (from IRS 1040 tax schedule 1, lines 3 and 6)		\$	\$	\$
Rental Income (from IRS 1040 tax schedule 1, line 5)		\$	\$	\$
Pensions and Annuities and IRA Distributions (i.e. withdrawals) excluding rollovers (from IRS 1040 page 1, line 5b)		\$	\$	\$
Social Security Benefits (from IRS 1040 page 1 line 6b)		\$	\$	\$
Unemployment Benefits (from IRS 1040 tax schedule 1, line 7)		\$	\$	\$
UNTAXED INCOME received for calendar year 2023	REQUIRED SUPPORT DOCUMENT or FORM	STUDENT	PARENT, or STUDENT'S SPOUSE	PARENT'S SPOUSE or PARTNER
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans (IRS 1040 tax schedule 1, lines 15, 16,17 and 20)	Signed 2023 Federal Tax Form 1040 <u>OR</u> IRS Tax Return Transcript using the IRS website	\$	\$	\$
Tax exempt interest income (IRS 1040 page 1, line 2a)		\$	\$	\$
Foreign income exclusion (1040 tax schedule 1, line 8d)		\$	\$	\$
Education tax credits (IRS 1040 tax schedule 3, line 3)		\$	\$	\$
Untaxed portions of Pensions, Annuities and IRA Distributions and Withdrawals (1040 page 1, line 4a minus 4b and 5a minus 5b) <i>excluding rollovers</i>		\$	\$	\$

Do not include on this form: Any student financial aid (i.e. grants, scholarships, or loans), earned income credit, additional child tax credit, SNAP benefits, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from cafeteria plans, or credit for federal tax on special fuels.



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TO BE COMPLETED FOR OPTION 2: 2024 INCOME FORM

Please report your annual income that will be received for calendar year 2024. Report all taxed and untaxed income amounts received by the STUDENT and student's SPOUSE (if married) for an independent student OR for the STUDENT and both married PARENTS (except for separation/divorce/widowed appeals) for a dependent student.

Do not leave any item blank. If not applicable, please indicate 0.

TAXED INCOME expected for 2024 (from January 1 – December 31, 2024)	REQUIRED SUPPORT DOCUMENT or FORM	STUDENT	PARENT, or STUDENT'S SPOUSE	PARENT'S SPOUSE or PARTNER
Earnings and Wages from Employment including severance pay	Most recent pay stub received from all jobs worked in 2024 <u>AND</u> for a job loss, employer letter listing last day of work or verifying any reduction in pay with a current employer	\$	\$	\$
Interest and Dividend Income	<i>No support document needed at this time</i> (report expected annual amount for 2024 using your most recent financial account statements)	\$	\$	\$
Capital Gains		\$	\$	\$
Alimony and Spousal Support (received only NOT paid)	Court documentation indicating any amounts received and effective date for any change or end of payments received	\$	\$	\$
Self-Employment *, Business *, or Farm *	Signed 2024 Federal Tax Form 1040 and including tax schedule 1 <u>OR</u> 2024 IRS Tax Return Transcript when available	\$	\$	\$
Rental Property Income *	* For this type of income, you must wait until your 2024 tax return is completed <u>after</u> December 31, 2024	\$	\$	\$
Pensions, Annuities and IRA Distributions (withdrawals) <i>excluding rollovers</i>	Most recent pension benefit letter and/or annuity and/or retirement account statement listing amounts and dates	\$	\$	\$
Social Security Benefits	Social Security benefit letter listing amounts and dates and any change in benefits	\$	\$	\$
Unemployment Benefits	Unemployment benefit letter listing amounts and dates	\$	\$	\$
UNTAXED INCOME expected for 2024	REQUIRED SUPPORT DOCUMENT or FORM	STUDENT	PARENT, or STUDENT'S SPOUSE	PARENT'S SPOUSE or PARTNER
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, etc.	<i>No support document needed at this time</i> (report expected annual amount for 2024 using your most recent benefit notice/letter and/or related financial account statements)	\$	\$	\$
Tax exempt interest income		\$	\$	\$
Foreign income exclusion		\$	\$	\$
Education tax credits		\$	\$	\$
<i>Untaxed</i> portions of Pensions, Annuities and IRA Distributions (withdrawals) <i>excluding rollovers</i>		\$	\$	\$

Do not include on this form: Any student financial aid (i.e. grants, scholarships, or loans), earned income credit, additional child tax credit, SNAP benefits, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from cafeteria plans, or credit for federal tax on special fuels.



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FINAL CHECKLIST

Please verify the following steps have been completed before submitting your forms

Required Forms for Review:

- Completed and signed appeal form and explanation of circumstances
- Attached copies of all income and support documentation corresponding to amounts listed on either page 3 (using Option 1) or page 4 (using Option 2)
- Read and sign the appeal form certification section below

CERTIFICATION AND SIGNATURES

I acknowledge that all of the information on this form is true and complete. I know I may have to provide further information if necessary.

I agree to notify Buckeye Link if my financial situation/circumstance changes from what I have reported on this appeal form.

If using Option 2, I understand this appeal is based on projections. 2024 tax return information/forms for parent and/or student may be required at a later date.

I understand that the information I submit may be shared with university offices that have a need to know for purposes of reviewing and processing this appeal, and/or to comply with university policy or law.

HANDWRITTEN SIGNATURES ONLY.

_____	_____	_____
Student Signature (do not type)	Printed Name	Date
_____	_____	_____
Parent Signature (do not type)	Printed Name	Date

To return this form:

Students may upload all forms and documents to the Secure Document Uploader: sfa.osu.edu | Fax to: 614-292-9264 | Mail to: Buckeye Link, P.O. Box 183029 Columbus OH 43218-3029 | Questions: 614-292-0300 or help.osu.edu.

Note: Do not submit this form or any supporting documents via email.

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