
Special Circumstances Appeal Instructions

Special Circumstance appeals are reviewed for fall semester, July through October 31, 2009 and for spring semester, January through March, 2010.

For independent students

You may complete the Special Circumstances Appeal form if you are an independent student whose current financial situation is not accurately reflected by 2008 tax information. Your 2008 income is used to assess your financial need for the 2009-2010 school year, in accordance with federal laws and regulations. If your income is lower due to special circumstances, a financial aid administrator may be able to use estimated year 2009 income to calculate financial need. This financial situation may be due to loss of job, separation or divorce, death, unusual paid medical expenses, or other circumstances. Your appeal is complete only when you submit documentation that supports your circumstance to the Financial Aid Office. If any document is missing, your appeal will be returned to you immediately and will be considered only when you have resubmitted it with complete documentation. You must also submit a personal statement describing your circumstance.

Documentation is an essential part of your appeal.

In addition, select one category from the following list that most closely describes your special circumstance. Read the description carefully and attach all of the documentation requested under that category.

■ Loss or reduction of employment

You and/or your spouse earned money in 2008 and have had a reduction in hours, or have lost employment for at least 10 weeks in 2009 that has resulted in a reduction of wages. **Ten (10) weeks** must have passed prior to submission of this appeal for either circumstance. Appeals submitted before 10 weeks will be returned.

You must provide copies of all the following:

-written verification from a former employer(s) that indicates start and end date of employment or reduction of hours and the amount of your (and your spouse's) year-to-date gross earnings, severance pay, vacation, or retirement payout;

-a written statement from your (or your spouse's) current or future employer(s) that indicates you or your spouse's expected gross earnings for the calendar year 2009. Include copies of your two most recent pay stubs.

-eligibility forms that indicate dates and amount of unemployment benefits.

■ Separation, divorce, or death

You have already filed your annual Free Application for Federal Student Aid (FAFSA) and since that time, you have become separated or divorced, or a spouse has died.

You must provide copies of all of the following that apply to your circumstances:

-legal separation papers or divorce decree;

-death certificate.

■ **Loss of taxed/untaxed income or benefit**

You and/or your spouse received unemployment compensation, or another taxed or untaxed income or benefit in 2008, and have completely lost that income or benefit for at least 10 weeks in the calendar year 2009. Ten (10) weeks without compensation must have passed prior to your submission of this appeal. Appeals submitted before 10 weeks will be returned. The untaxed income or benefit must be from a public or private agency, a company, or from a person due to court order. (Do not include loss of veterans benefits.) Income and benefits include: Social Security benefits, Supplemental Security Income (SSI), child support, untaxed retirement or disability benefits, welfare benefits, etc.

You must provide copies of all of the following:

-contracts, agency notices, or legal papers that indicate the date your taxed/untaxed income or benefit was terminated, what amount of income came from that source, and how that income was used.

■ **Loss of one-time income**

You and/or your spouse received a one-time income in 2008 that will not occur in 2009 (e.g., rollover into a Roth IRA, moving expense allowance, back-year Social Security payments, or a divorce settlement). Special circumstance consideration **will not** be given if this one-time income is a result of an inheritance, job bonus or overtime compensation, gambling winnings, pension, capital gain, insurance settlements, or early distributions of retirement accounts.

You must provide copies of all of the following:

-contracts, agency notices, or legal papers that indicate the date your one-time income was terminated, what amount of income came from that source, and how that income was used.

■ **Unusual, unreimbursed medical care expenses**

NOTE: Only expenses already paid directly by you will be considered.

Unexpected/nonrecurring medical expenses -- You and/ or your spouse have paid for unusual or unexpected nonrecurring medical expenses for a member of your household that are not reimbursed. Only those costs not covered by insurance or another agency may be considered.

The payment of insurance premiums, regular health maintenance, and routine expenses such as eyeglasses, birth control prescriptions, and elective or cosmetic procedures (e.g., orthodontic braces) are not considered unusual medical expenses and **will not** be considered for the Special Circumstances appeal.

You must provide copies of all of the following:

-statement from a health care provider that documents the unusual condition;
-receipts or copies of canceled checks that demonstrate payment of medical treatment for this condition.

■ **Tuition expenses for private elementary or secondary education**

You and or your spouse pay elementary or secondary school tuition for a member of your family during the 2009-2010 academic year at a PRIVATE elementary or secondary school.

You must provide copies of all of the following:

-school's enrollment contract that includes name(s) of your children enrolled during the academic year 2009-2010, tuition cost, and the amount of any scholarships that subsidize tuition..