

Special Circumstances Appeal DEPENDENT Student Instructions

Special Circumstance appeals are reviewed case by case starting **July 1, 2021** through **March 31, 2022**

Important Note: The instructions below apply to each parent included in the household. Notify the financial aid office if the parents filed separate IRS income tax returns for 2019 or had a change in marital status after December 31, 2019.

You may complete the Special Circumstances Appeal form if you are a dependent student whose parents' current financial situation is not accurately reflected by their 2019 tax information. Your family's 2019 income is used to assess your financial need for the 2021-2022 school year, in accordance with federal laws and regulations. If your family's income is lower due to special circumstances, a financial aid administrator may be able to use 2020 income or estimated year 2021 income to calculate financial need. **Your appeal is complete only when you submit documentation that supports your circumstance to the Financial Aid Office.** Your appeal will not be considered until all necessary documents have been submitted.

YOU MUST ALSO SUBMIT A DETAILED PERSONAL STATEMENT DESCRIBING THE CIRCUMSTANCE ALONG WITH YOUR DOCUMENTATION.

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**

Your parent(s) earned money in 2019 and has had a reduction in hours (loss of overtime compensation will not be considered), or has lost employment for at least 10 weeks in 2020 or 2021 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 TEN (10) WEEKS WILL NOT BE PROCESSED.

You must provide copies of all the following:

- Written verification from your parents' former employer(s) indicating start and end dates of employment or reduction of hours, the amount of your parent(s) year-to-date gross earnings, severance pay, vacation, or retirement payout.
- A written statement from your parent's current or future employer(s) that indicates his/her expected gross earnings for the calendar year 2021.
- Include copies of your parent's two most recent pay stubs.
- Eligibility forms that indicate dates and amount of unemployment benefits.
- 2020 Signed Federal IRS Tax Return or Tax Return Transcript.

◆ **Separation, divorce, or death**

If you have already completed your Free Application for Federal Student Aid (FAFSA) for the current academic year and since that time your parent(s) have become separated, divorced, or a parent has died.

You must provide copies of all of the following that apply to your parent(s) circumstance(s):

- Legal separation papers or divorce decree.
- Death certificate.
- Updated 'Number of Household Member and Number in College' verification form.
- 2019 Signed Federal IRS Tax Return or Tax Return Transcript
- 2019 W-2's.

◆ Loss of taxed/untaxed income or benefit

Your parent(s) received unemployment compensation, other taxed or untaxed income, or a benefit in 2019, and have completely lost that compensation, income, or benefit for at least 10 weeks in the calendar year 2020 or 2021. Ten (10) weeks without compensation must have passed prior to your submission of this appeal.

APPEALS SUBMITTED BEFORE 10 WEEKS WILL NOT BE ACCEPTED.

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 veteran 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 parents taxed/untaxed income or benefit was terminated.
- What amount of income came from that source.
- How that income was used.
- 2020 Signed Federal IRS Tax Return or Tax Return Transcript.

◆ Loss of one-time income

Your parent(s) received a one-time income in 2019 or 2020 that will not occur in 2020 or 2021 (e.g. rollover into a Roth IRA, moving expense allowance, past-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 the following:

- Contracts, agency notices, or legal papers that indicate the date your parents taxed/untaxed income or benefit was terminated.
- What amount of income came from that source.
- How that income was used.
- 2020 Signed Federal IRS Tax Return or Tax Return Transcript.

◆ Unusual, unreimbursed out of pocket medical care expense

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

Unexpected/non-recurring out of pocket medical expenses—Your parent(s) have paid out of pocket 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 the following:

- Statement from a health care provider that documents the unusual condition.
- Receipts that demonstrate payment of medical treatment for this condition.

◆ Tuition expenses for private elementary or secondary education

Your parent(s) pays elementary or secondary school tuition for a member of your family during the 2021-2022 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 the child(ren) enrolled during the academic year 2021-2022.
- Tuition cost and the amount of any scholarships that subsidize tuition.

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DEPENDENT STUDENTS

Read the Special Circumstances Appeal Instructions carefully before completing this form. Attach your personal statement and all required documentation. You must complete Sections 1, 2, & 3. The appeal will be for one year only. **Please provide income information for 2020 and 2021.**

SECTION 1: Background

Student name (first, middle initial, last)

W#

Date

Address (Street or P.O. Box, City, State, Zip-code)

SECTION 2: Income source table (Income Jan. 1—Dec. 31, 2020) or (Projection of income Jan. 1 - Dec. 31, 2021)

Year 2020
Total
Income2021 Year–
To-Date
IncomeRest of
2021 year
Income2021
Total
Income

1. Income earned from work by student (Example: wages, salary and tips)

2. Income earned from work by parent 1 (Example: wages, salary and tips)

3. Income earned from work by parent 2 (Example: wages, salary and tips)

3. Business, farm, or rental income

4. Unemployment compensation

5. Spousal maintenance

6. Child support

7. Welfare benefits (such as AFDC or TANF)

8. Veterans benefits

9. Social Security benefits (including SSI)

10. Workman's compensation

11. Short-term or long-term disability benefits

12. Severance pay

13. Withdrawal from retirement account

14. Other income (pension, annuity, rental income, housing allowance, bonuses)

2020/2021 Totals

SECTION 3: Certification

To the best of my knowledge, the information in this appeal is true. I understand that the misrepresentation of facts in connection with this appeal, whenever discovered, may be sufficient cause, in and of itself, for cancellation and repayment of financial aid. **Warning: If you use this form to establish eligibility for federal student financial aid and purposely give false or misleading information, you may be fined \$20,000, sent to prison, or both.**

Student signature:

Date:

Parent signature:

Date:

To be completed by WSU Financial Aid Office

ACTION:

Denied

Approved

FAA Initials _____ DATE _____

COMMENTS: