

Financial Aid

2014-15 Special Circumstances Appeal



Instructions for Completing a Special Circumstances Appeal

All Appeals

- **SUBMISSION DATES:**
 - **Special Circumstance Appeals for estimated 2014 income cannot be submitted before April 1, 2014 for incoming students or before June 1, 2014 for returning students.**
 - All appeals must be submitted *at least* two weeks before the student's last day of attendance. If an appeal is submitted after the semester has begun there is no guarantee that the appeal will be processed before the student stops attending.
- Our office must receive your processed 2014-15 FAFSA and Profile applications, and all other required materials before your appeal can be processed.
- **Anyone requesting a special circumstances appeal must also go through the 2014-15 verification process if they have not already done so, even if the original aid application was not selected for a verification review.** The verification process requires submission of copies of 2013 tax transcripts, W2s, and the completion of the *Verification Statement*. This form can be downloaded at www.saintmarys.edu/financial-aid-forms.
- Appeals are granted on a case-by-case basis and supporting documentation is required. Your situation will be carefully reviewed and you will be notified of any changes to your eligibility. Once all of the required documentation is submitted, you will be notified of the results of your appeal. The time frame for when we notify you of the results of your appeal will vary depending on the time of year the appeal is received.
- Each year we will only process appeals for estimated income once, so wait until you can provide the most accurate estimate of your income before submitting.
- Completing this appeal form may not necessarily result in an increase in financial aid.
- Students must accept and utilize all Federal student loans before an appeal will be reviewed and processed. We will not award additional grant or scholarship monies in the place of declined student loans.

Appeals for Estimated Income

- Appeals for estimated income should only be submitted, and will only be approved, if the change in circumstance is a one-time only event. In other words, if a change in income will re occur, it would not be considered a "special/unique" situation.
- It is important to provide the required documentation and the most accurate estimate possible of your earnings. We cannot accept income appeals that are left blank, include income ranges or that are uncertain. Please wait until you have sufficient data to support your estimate before submitting this to the Financial Aid Office.
- Due to Indiana State grant policy, appeals for estimated income will **not** result in an increase of any previously awarded Indiana State grant funds.
- All students who complete a Special Circumstance Appeal for Estimated Income will be selected for verification in the following aid year. For example, if an appeal is processed in 2014-15 based on 2014 estimated income, the student will be selected for verification in 2015-16 to confirm actual 2014 reported income. If the actual income reported was significantly more than the 2014 estimate, we will not process another appeal in 2015-16.

Appeals for Medical Expenses

- You do not need to complete the "2014 Estimated Income" table on page 3.
- Only non-covered, out of pocket expenses allowed as Internal Revenue itemized deductions may be submitted. For a list of Internal Revenue Service allowable expenses, go to:
<http://www.irs.gov/publications/p502/ar02.html>

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Student Name _____ Student I.D. _____
Phone Number (____) _____ E-mail address _____

Use this form to request a re-evaluation of your eligibility for financial aid based on your family's unique circumstances. Please note the following:

Check list - **do not submit this appeal unless all of the following steps have been completed:**

- ___ I have reviewed the instructions on the 1st page of the Special Circumstance Appeal form.
- ___ **I have explained our circumstances in detail on an attached sheet.**
- ___ I have checked the appropriate circumstance(s) and **have submitted the required documentation with this form.**
- ___ If I am submitting an appeal to use estimated 2014 income on the aid applications, I have completely filled-out the grid on page three using gross amounts of my/our estimated income from all sources, both taxed and un-taxed.
- ___ **Even if my aid application was not previously selected for a verification review, I have submitted the required verification documents:** the *Verification Statement*, official tax data from the IRS for both the student and parents, and all W2s.
- ___ I understand that by filing this form I am not guaranteed to receive additional financial aid.

If Saint Mary's College Financial Aid Office has questions about this Appeal, please contact the person listed below:

Name: _____

Email: _____

Phone: _____

I certify that the information reported in this form is true and complete to the best of my knowledge.

Student Signature

Date

Parent signature

Date

PLEASE INDICATE THE REASON FOR THIS APPEAL

✓	Reason For Appeal	Documentation Required
	Loss of wages/untaxed income/benefits	<ol style="list-style-type: none"> 1. Complete the <i>2014 Estimated Income</i> table below. 2. Documentation that proves the income received to date for the year (e.g., copy of most recent/final pay stub, documentation of unemployment benefits, etc.) 3. Documentation that explains and substantiates the estimate for the amount of income you will receive for the remainder of the year.
	Separation or divorce since the aid applications were completed	<ol style="list-style-type: none"> 1. Complete the <i>2014 Estimated Income</i> table below, only reporting income for the parent who most recently provided more than half of the student's financial support. 2. Documentation confirming the date of the separation or divorce. 3. For the parent who completed the <i>2014 Estimated Income</i> table, documentation that proves the income already received to date for the year (e.g., copy of most recent/final pay stub, etc.) and that verifies the estimate for the amount of income you will receive for the remainder of the year.
	Death of a parent since the aid applications were completed	<ol style="list-style-type: none"> 1. Complete the <i>2014 Estimated Income</i> table below. 2. Copy of death certificate, obituary, etc. 3. Documentation that proves the income already received to date for the year (e.g., copy of most recent/final pay stub, etc.) and that verifies the estimate for the amount of income you will receive for the remainder of the year.
	Paid tuition for elementary school or high school age children (other than the Saint Mary's student)	<ol style="list-style-type: none"> 1. Documentation of the amount the parent(s) <u>paid in 2013</u> (copies of bills, cancelled checks, etc.).
	Payments made for Parent PLUS loans or parent's own college loans	<ol style="list-style-type: none"> 1. Documentation of the amount the parent(s) <u>paid in 2013</u> (copies of bills, cancelled checks, etc.).
	Paid medical and/or dental expenses	<ol style="list-style-type: none"> 1. Documentation of the amount the parent(s) <u>paid in 2013</u> (copies of bills, cancelled checks, etc.). If the parent(s) itemized these expenses on Schedule A of the 2013 1040 tax return, a copy of your tax return transcript would suffice as documentation.

2014 Estimated Income

If the answer to an item is none, write in \$0. In addition to completing the table below, you must still provide the required documentation for your appeal.

	Father/Step-father	Mother/Step-mother
1. Gross income from work <i>from 1/1/2014 until today</i>		
2. Estimated gross income from work <i>from today until 12/31/2014</i>		
3. Total gross income from work (add lines 1 and 2)		
4. Unemployment benefits		
5. Other taxable income (Self-employment, Business or Farm income, early distribution from retirement, pension and annuities, alimony, taxable social security benefits, interest & dividend income, etc.)		
6. Total taxable income for parent(s) (add lines 3 through 5) Compare this to your 2013 adjusted gross income. If your 2014 estimate is not significantly less than your 2013 adjusted gross income, do not submit the appeal		
7. Child support <u>received</u> for all children		
8. Other untaxed income (e.g., IRA deductions, payments to tax deferred pension plans, self-employed SEP, Keogh, TANF, VA non-education benefits, untaxed Social Security, etc.)		
9. Total untaxed income for 2014 (add lines 7 and 8)		
10. Education credits, child support <u>paid</u> to another household		