

Financial Aid

2012-13 Special Circumstances Appeal



Instructions for Completing a Special Circumstances Appeal

- **SUBMISSION DATES:** Special Circumstance Appeals **cannot be submitted before April 1, 2012** for incoming students or before **June 1, 2012** for returning students.
- Our office must receive your processed 2012-13 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 2012-13 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 **signed** copies of 2011 tax transcripts, W2s, and the completion of the *Verification Statement*. This form can be downloaded at www3.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.
- Completing this appeal form may not necessarily result in an increase in financial aid.
- Students must utilize all Federal student loans before an appeal will be reviewed and processed. We cannot award additional grant or scholarship monies in the place of declined student loans.

Appeal for Estimated Income

- 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.
- Before beginning the process of gathering information for an Estimated Income Appeal, we recommend that you review the Estimated Income Table and input some rough (initial) figures. If you determine that your estimated income is more than the income you initially reported on your FAFSA and/or Profile, do not submit the appeal because you do not qualify. In general, changes resulting in less than a **10%** decrease in income will not have any impact on the current financial aid award.
- 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 2012-13 based on 2012 estimated income, the student will be selected for verification in 2013-2014 to confirm actual 2012 reported income. If the actual income reported was significantly more than the 2012 estimate, we will not process another appeal in 2013-2014.

Appeal for Medical Expenses

- 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>

Financial Aid

2012-13 Special Circumstances Appeal

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

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 (use this to ensure all steps have been completed):

- I have reviewed the Special Circumstance Appeal Instruction sheet.
- 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.**
- 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. ****Please note that your appeal will NOT be processed until all supporting documentation is received.**
- 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>2012 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>2012 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>2012 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>2012 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) paid in 2011 (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) paid in 2011 (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) paid in 2011 (copies of bills, cancelled checks, etc.). If the parent(s) itemized these expenses on Schedule A of the 2011 1040 tax return, a copy of your tax transcript would suffice as documentation.

2012 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 1/1/2012 until today</i>		
2. Estimated gross income from work <i>from today until 12/31/2012</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, pension and annuities, alimony, taxable social security benefits, interest & dividend income, etc.)		
6. Total taxable income for parent(s) (add lines 3 through 5)		
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 2012 (add lines 7 and 8)		
10. Education credits, child support <u>paid</u>		