Special Circumstances Appeal for DEPENDENT Student Instructions

Special Circumstance appeals are reviewed case by case starting July 1, 2017 through March 31, 2019.

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 2016 or had a change in marital status after December 31, 2016.

You may complete the Special Circumstances Appeal form if you are a dependent student whose parent’s current financial situation is not accurately reflected by their 2016 tax information. Your family’s 2016 income is used to assess your financial need for the 2018-2019 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 2017 income or estimated year 2018 income to calculate financial need. This financial situation may be due to loss or reduction of employment, separation, divorce, or death of a parent, loss of income, unusual out of pocket medical expenses, or other circumstances. **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.**

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 2016 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 2017 or 2018 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, reduction of hours, the amount of your parents 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 2018
  - Include copies of your parent’s two most recent pay stubs
  - Eligibility forms that indicate dates and amount of unemployment benefits
  Or 2017 IRS federal tax returns/tax return transcripts

- **Separation, divorce, or death**
  You have already filed your annual Free Application for Federal Student Aid (FAFSA) and since that time, your parents have become separated, divorced or a parent 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
Your parent(s) received unemployment compensation, or other taxed or untaxed income or benefit in 2016, and
have completely lost that income or benefit for at least 10 weeks in the calendar year 2017 or 2018. Ten (10)
weeks without compensation must have passed prior to your submission of this appeal. **APPEALS SUBMITTED BE-
FORE 10 WEEKS WILL NOT BE ACCEPTED.** The untaxed income or benefit must be from a public or private agen-
cy, 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
Or 2017 IRS Federal tax return/tax return transcript

❖ Loss of one-time income
Your parent(s) received a one-time income in 2017 that will not occur in 2018 (e.g. rollover into a Roth IRA, moving
expense allowance, back-year Social Security payments, or a divorce settlement). Special circumstances consider-
tion 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 parent’s income was terminated
• What amount of income came from that source
• How that income was used
Or 2017 IRS Federal tax return/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 for unusual or unexpected
nonrecurring medical expenses for a member of your household that are not reimbursed. Only those costs not cov-
ered 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 proce-
dures (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) pay elementary or secondary school tuition for a member of your family during the 2018–2019
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
  2018-2019
• Tuition cost, and the amount of any scholarships that subsidize tuition
Special Circumstances Appeal

**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 2017 and 2018.

### SECTION 1: Background

<table>
<thead>
<tr>
<th>Student name (first, middle initial, last)</th>
<th>W#</th>
<th>Date</th>
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<tbody>
<tr>
<td>Address (Street or P.O. Box, City, State, Zip-code)</td>
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### SECTION 2: Income source table

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<tbody>
<tr>
<td>1. Income earned from work by parent 1 (Example: wages, salary, and tips)</td>
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<td>2. Income earned from work by parent 2 (Example: wages, salary, and tips)</td>
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<td>3. Business, farm, or rental income</td>
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<td>4. Unemployment compensation</td>
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<td>5. Spousal maintenance</td>
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<td>6. Child support</td>
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<td>7. Welfare benefits (such as AFDC or TANF)</td>
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<td>8. Veterans benefits</td>
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<td>9. Social Security benefits (including SSI)</td>
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<td>10. Workman’s compensation</td>
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<td>11. Short-term or long-term disability benefits</td>
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<td>12. Severance pay</td>
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<td>13. Withdrawal from retirement account</td>
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<td>14. Other income (pension, annuity, rental income, housing allowance, bonuses)</td>
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<td><strong>2017 or 2018 Totals</strong></td>
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### 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.**

<table>
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<tr>
<th>Student signature:</th>
<th>Date:</th>
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<tr>
<td>Parent signature:</td>
<td>Date:</td>
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To be completed by WSU Financial Aid Office

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<tr>
<th>ACTION:</th>
<th>Denied</th>
<th>Approved</th>
<th>FAA Initials</th>
<th>DATE</th>
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<td>COMMENTS:</td>
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