

INDIANA UNIVERSITY SOUTHEAST Special Circumstances Appeal Form

2009-2010 Academic Year/Summer

**Office of Financial Aid
Indiana University Southeast**

4201 Grant Line Road

University South 105

New Albany, IN 47150

(812)941-2246 Fax (812) 941-2546

Web site: <http://www.ius.edu/financialaid>

email: financialaid@ius.edu

DO NOT LEAVE ANY SPACES BLANK – complete all 4 steps

Purpose: Sometimes the resources reported on the FAFSA are not representative of a student's actual resources because of unexpected circumstances. Though you cannot adjust your own FAFSA in this case, the Office of Financial Aid is permitted to make adjustments if we can justify our changes through appropriate documentation.

Requirements: The student must have submitted a FAFSA for the 2009/2010 academic year. Your FAFSA information will be verified and corrected if necessary prior to consideration of your appeal.

Deadline: Appeals must be submitted **no later than 30 days before the last day of finals** of the semester in which you are currently enrolled. Incomplete or late submission of this form and documentation may result in denial of the appeal. If more documentation is needed you have 30 days from the notification e-mail date to respond unless otherwise noted.

Process: Appeals are reviewed by committee and the student notified by **IU e-mail** if more information is needed and of the result. If approved, changes are submitted to the U.S. Department of Education for acceptance. Once changes are accepted, financial aid will be adjusted. Loans from previous semesters and state aid cannot be adjusted. Appeals may be closed without a ruling if the requested changes would not affect the student's financial aid package. Appeals will be denied if the student did not provide sufficient documentation to support their claim, missed the deadline, or if their claim did not meet federal guidelines for approval.

STEP 1: STUDENT INFORMATION and ACKNOWLEDGEMENT

Student's	Last Name	First	M.I.	University ID
Phone Number				IU e-mail

Student must provide this form **and** the 2009/2010 VERIFICATION WORKSHEET and all required documentation as stated on that form. Additional documents are required as noted on page 2:

I already submitted my verification paperwork when I was selected for 2009/2010 verification.

READ AND SIGN:

I give permission to the Office of Financial Aid to verify any information I provide on this form. I understand that this will include verification of the information submitted on my FAFSA which may result in a reduction of my current financial aid award. I certify that all of the information provided on this form is correct to the best of my knowledge. I understand that if I purposely give false or misleading information on the required forms, I am liable for cancellation or repayment of all or part of my financial aid.

I acknowledge that all communication regarding this appeal will be sent to my (the student) IU e-mail account.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____
(Dependent students only)

Spouse Signature: _____ Date: _____
(Independent married students only)

Please complete page 2

Student Name:

STEP 2: CHECK AND COMPLETE ALL THAT APPLY

INCOME (Check one or both) Student and/or spouse or parent(s) expect a significant involuntary decrease in income from 2008 to 2009. Please note that changes in employment must be involuntary. Wait until you have received your unemployment/disability claim summary statement and/or severance/retirement packages before appealing.

Additional Documentation:

- ① Last pay stub of former job and date of job loss/reduction
- ② Documentation that the job change was involuntary and on what date it took effect
- ③ Most recent pay stub of new job and documentation of start date, and/or
- ④ Unemployment Benefit Statement and/or
- ⑤ Disabilities Benefit Statement or Retirement Benefit Statement

MEDICAL EXPENSES Family has incurred extraordinary medical costs during 2008.

Documentation: Proof of all medical and/or dental expenses paid by you during 2008, including insurance premiums.

If you filed a federal 1040 tax return and you itemized your medical expenses on Schedule A, a copy of this form will be sufficient evidence. If you did not itemize, provide an estimate of your expenses below. A simulation will be run to determine if your expenses are high enough to make a difference in your aid and if so will notify you of the documentation we will require.

Estimated medical expenses you paid in 2008: _____

NATURAL DISASTER Family has incurred extraordinary non-reimbursed housing expenses during 2008 due to a natural disaster. Please provide an itemized statement showing expenses incurred and payments made in 2008 as well as documentation of the circumstance.

Additional Documentation:

- ① Insurance claim or denial
- ② Receipts for damage and repair costs as well as extra living expenses showing your actual payments made in 2008

MARITAL STATUS Student or Parent has become separated, divorced or widowed since filing FAFSA.

Separated Divorced Widowed on: (date) _____

Please provide documentation of the date noted above and a copy of any alimony or child support agreement.

Complete the Verification Worksheet (see Page 1, Section 1) based on the student or single parent and student only. If any assets (investments, savings, business/farm values) reported on the student's FAFSA application have been split as a result of a divorce settlement, please provide a copy of the asset split agreement and documentation of values as of the split agreement. Note the total expected child support payments (for any child in the household) on the Verification form.

STEP 3: SUMMARY OF STUDENT'S REQUEST

What is it that you are requesting and what are the circumstances? On a separate sheet of paper, please submit a brief summary of the specific adjustments you are requesting and the involuntary and/or extraordinary circumstances that led to your request.

STEP 4: FOLLOW-UP

Check your IU e-mail regularly. **DO NOT MAKE CHANGES TO YOUR FAFSA.**

You will receive a response quickly through your IU e-mail if more information is needed, and will have 30 days to respond. You will be notified within 45 days after receipt of all required paperwork with the result of your appeal.

Loan instructions: Please note if you will want additional loan funds if eligible.

I do not want additional loans

Post any additional loan funds in "Offered" status (you must accept or reduce your loan offer in OneStart)