

Special Circumstances, Appeals and Desired Outcomes

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1. Types of special circumstances and how to address them:

- Some circumstances will be addressed while completing the financial aid application (FAFSA or WASFA)
- Others will require you to follow up with the financial aid office after completing the financial aid application

| Circumstance | Address within FAFSA/WASFA | Address with Financial Aid Office | Desired outcome |
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| Un/Married/Divorced/Separated parents, living together | Report both of their tax information | | |
| Divorced parents, not living together | Report the income of the parent that provides 50% or more of your support, even if student is not claimed on this parent tax return. | | |
| Stepparents | If parent who provides more than 50% of support is remarried, stepparent financial information MUST also be reported. | | |
| Experiencing Homelessness & Unaccompanied minors | Make sure to answer "Yes" to Dependency Determination question. Do not include parent(s) tax information. | Secure documentation from your high school McKinney-Vento liaison or director of shelter/living facility where you are staying. Follow up with the financial aid office. <u>If you are able:</u> Provide written evidence of your situation from people like district liaison, school counselors, social workers, director of shelter, homeless youth center, transitional living. <u>If you are unable:</u> financial aid staff will meet with you to discuss your circumstances and decide if you meet conditions. | Get independent status so you don't have to provide parental information |
| Foster Youth/ Ward of the court/Parents deceased | If status started <u>after</u> the age of 13, provide student income information ONLY. If status started <u>before</u> age 13, provide adoptive parents' income information. | If adopted <u>after</u> the age of 13, provide proof that you were in foster care (court documents). If parents are deceased, provide copy of death certificate to fin aid office. | Get independent status so you don't have to provide parental information |

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| Incarcerated Parent/Unable to locate parent | Make sure to answer “Yes” to “I have special circumstances and I am unable to provide parent information.” | The financial aid office will probably ask you to provide supporting documentation or letters of people who are aware of your circumstances. | Get independent status so you don’t have to provide parental information |
| Emancipated, legal guardianship | If <u>after</u> age 13 but before 18, answer “Yes” and provide student’s income only. Select “No” if you are still under age of 18 and the court decision is no longer in effect. | Provide a copy of court's decision. | Get independent status so you don’t have to provide parental information |
| Third-party custody, informal guardianship (family member) | Make sure to check “I will not be able to provide parental information.” Your Student Aid Report (SAR) will not calculate an Estimated Family Contribution (EFC) | Submit a dependency override appeal to the financial aid office. You will need to write a statement and provide documentation from people familiar with your circumstances. | Get independent status so you don’t need to provide parental information |
| Changes in family income | Use your and your parents’ 2020 tax information. IF 2021 income is significantly different from 2020, submit a special circumstance appeal. | Submit a special circumstances appeal to the financial aid office. You will need to write a statement explaining changes and documentation supporting this change (i.e. paystub, letter of job termination) with an estimate of new income. | *Decrease your Expected Family Contribution (if your EFC = 0, no need to appeal). *Increase financial aid received. |
| Unusual expenses | Use your and your parents’ 2020 tax information. IF 2021 expenses are significantly different from 2020, submit a special circumstance appeal. | Submit a special circumstance appeal to the financial aid office. You will need to write a statement explaining additional expenses with supporting documentation (i.e. medical bills, etc.) | *Increase your Cost of Attendance (COA) to make room for *additional financial aid. |

What is not considered special circumstances?

- Your parents refuse to provide their financial information.
- Your parents refuse to contribute to your college expenses.
- Your parents cannot contribute to your college expenses.
- Your parents do not claim you on their taxes.
- You do not live with your parents.
- Your parents live abroad.

You can get started with the appeal process using this tool that will walk you through each step:

<https://formswift.com/swift-student>