

Special Circumstances, Appeals and Desired Outcomes

Maria Rebecchi
Director,
Scholarships & Financial
Aid Education
College Success
Foundation
mrebecchi@collegesuccessfoundation.org

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
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 more financial support over the last 12 months, even if student is not claimed on this parent tax return.		
Stepparents	If parent who provides more financial support over the last 12 months 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

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 a Student Aid Index (SAI)	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’ 2022 tax information. IF 2023 income is significantly different from 2022, 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 Student Aid Index (if your SAI = 0, no need to appeal). *Increase financial aid received.
Unusual expenses	Use your and your parents’ 2022 tax information. IF 2023 expenses are significantly different from 2022, 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>