



2014-2015 SPECIAL CONDITION APPEAL

INFORMATION REGARDING APPEAL

The Office of Financial Aid and Scholarships has the authority to make adjustments to an individual's federal student aid application (FAFSA) based on special conditions within the household. It is important to know that not all changes in circumstances will result in an adjustment to the student's financial aid eligibility. When reviewing an appeal, the Office of Financial Aid and Scholarships takes into account the availability of funds and the nature of the change in circumstances. Additional financial aid options are usually available only if the student is or becomes Federal Pell Grant eligible or an increase in the student or parent Direct loan.

Before an appeal can be considered, the 2014-2015 FAFSA must have already been filed with Oregon State University.

INSTRUCTIONS:

Complete and submit the appeal request form:

1. Indicate the reason and for whom the appeal is being submitted,
2. Provide a written statement describing your financial circumstances and what caused a decrease in your resources (use a separate sheet of paper);
3. Attach the required documentation per your circumstance outlined below with the student name and OSU ID# on each page;
4. Submit appropriate verification documents including a federal income tax transcript (see below);
5. Sign this completed four page appeal before submitting it to the OSU Office of Student Financial Aid and Scholarships.

Include the student name and OSU ID# on all documentation. Please follow all instructions completely as missing information will delay the review of your appeal. The student will be notified through their OSU student email if any changes to their financial aid award occur. It is important to know that not all changes in circumstances will result in an adjustment to the student's aid eligibility.

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Student Last Name	First	M.I.	OSU Student ID#
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CERTIFICATION STATEMENT

Use this form to request a re-evaluation of your eligibility for financial aid if your family’s financial situation has changed since you submitted the Free Application for Federal Student Aid (FAFSA), or if your family has incurred expenses not reflected on the FAFSA. **Submitting the Special Circumstance Appeal may not necessarily result in an increase in financial aid.**

Please note the following:

Our office must receive your processed 2014-2015 FAFSA and all other required materials before an appeal can be processed.

Anyone requesting an appeal for special circumstances must also go through the verification process. The verification process requires submission of a 2013 Federal Income Tax Return Transcript if taxes were filed. You may download a PDF of your completed 2013 Federal Income Tax Return Transcript directly from the IRS website (found at www.irs.gov under the “Tools” heading) to be submitted with this appeal. If you have already used the FAFSA “Data Retrieval Tool” to update your income information in the 2014-2015 FAFSA, you must still submit a 2013 Federal Income Tax Return Transcript for this appeal process. Please write the student’s name and OSU ID # on the tax transcript.

****NOTE: If you are submitting this appeal after December 31, 2014, you must submit a 2014 Federal Income Tax Return Transcript if you filed or will file a federal income tax return.****

Appeals are granted on a case-by-case basis and supporting documentation is required. **Once all of the required documentation is submitted, your appeal will be carefully reviewed. You will be notified of the results of your appeal and any changes to your financial aid eligibility within 4 weeks.**

Check List (Use this to ensure all steps have been completed)

INDICATE PERSON APPEALING: Student Spouse Father Mother

Indicate the appropriate circumstance on the next page.

Attach a detailed letter explaining your circumstance, along with a timeline of events related to the circumstance.

Attach copies of the required documentation including federal tax return transcripts, and review this form for accuracy.

I understand that by submitting this form, I am not guaranteed to receive additional financial aid.

Certification: We understand that the Office of Financial Aid and Scholarships will not process this appeal if it is incomplete or lacks documentation. We are therefore submitting a complete appeal. Once a decision about the appeal has been made, we will be notified of the outcome. We further certify that all information provided with this appeal is true and correct.

Student Signature (required if appealing) Date

Parent Signature (required if appealing) Date

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Student Last Name	First	M.I.	OSU Student ID#
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Please check the appropriate circumstance(s) and required documentation on the list below. Attach the required documentation to your appeal and submit this completed form in its entirety. **IMPORTANT: Please do not submit any original document(s) to our office as we will be unable to return them.**

In addition to completing this form, you must also attach a letter explaining the reason you are requesting consideration for a special circumstance.

- 1. ___ Loss of Earnings and/or Loss of Untaxed Income or Benefits** – In 2014, the income of the parent or student or spouse will be less than the 2013 income reported on the 2014-2015 FAFSA due to the loss of employment, reduction in wages, loss of untaxed income, or reduction of untaxed income.

Required Documentation

Loss of job:

___ Letter from the state unemployment agency or other evidence that student/parent is receiving unemployment benefits. If you are not receiving unemployment, provide a letter from the student’s/parent’s employer or termination notice that confirms last date of employment, **and**

___ Proof of income for any employment in 2014 (i.e., pay stub from new job).

Reduction in wages:

___ Copy of student’s/parent’s most recent pay stub, **and**

___ Letter from the employer (if applicable) indicating changed pay rate and/or hours and effective date of change.

Loss or reduction in untaxed income or benefits (i.e., loss of child support):

___ Letter from appropriate public or private agency that states the date benefits ended, type of benefits terminated, and total amount of benefits received for 2014.

- 2. ___ One-time Income Benefit** – Family received a one-time income or benefit payment that was reported on their 2014-2015 FAFSA that they will not be receiving the following income year, (i.e., inheritance, sale of property, IRA distribution).

Required Documentation

___ One-time lump sum must have been reported on 2013 tax return or other official document, **and**

___ Documentation that this lump sum amount will not be received during the following 2014 year or any year after.

- 3. ___ Separation or Divorce** – Parents or student have separated or divorced since the 2014-2015 FAFSA was completed.

Required Documentation

___ Copy of the court order, other official document, or letter from third party which confirms date of separation or divorce, **and**

___ Copy of most recent W-2 from the student or parent who provides more financial support for the student.

- 4. ___ Death of Parent** – The student’s parent(s) or spouse passed away since the 2014-2015 FAFSA was completed.

Required Documentation

___ Copy of death certificate, newspaper obituary, or memorial service program, **and**

___ Copy of most recent W-2 from the surviving parent or student.

- 5. ___ Medical/Dental Expenses** – The student or your family paid significant insurance premiums or incurred significant medical/dental expenses not paid by insurance in 2013.

Required Documentation – Submit one or more of the following:

___ *For payment of insurance premiums*, a statement from the insurance provider or benefits office from place of employment stating the amount paid for medical coverage. A copy of a pay stub showing the amount deducted for medical insurance is required. Do not include employer’s contribution.

___ *For payment of medical expenses*, proof of payments made by parent/student (i.e. schedule A, statement of account from pharmacy/physician/dentist/hospital showing payment amount and dates payments were made, copies of cancelled checks).

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Student Last Name	First	M.I.	OSU Student ID#
<u>Parent Estimated Family Contribution Change Form</u>			

Report all income you have actually received from January 1, 2014 through today. Then estimate all income you expect to receive from today through December 31, 2014. **YOU MUST ATTACH DOCUMENTATION OF ALL ACTUAL INCOME.** Documentation could include most recent pay stubs with year-to-date earnings, W-2 forms, a letter from an employer stating your total earnings, an estimate of future income, etc. **After December 31, 2014**, you must: 1) Submit a copy of your completed 2014 Federal Tax Return Transcript; and 2) Complete only the **ACTUAL** column below.

TAXABLE INCOME FOR JANUARY 1, 2014 TO DECEMBER 31, 2014	ACTUAL 01/01/14 - Today	ESTIMATED Today – 12/31/14	TOTAL Actual + Estimated
2014 income earned from work by father (<i>wages, salaries, tips</i>)			
2014 income earned from work by mother (<i>wages, salaries, tips</i>)			
Interest income and dividends			
Alimony received			
Business and/or farm income			
Capital Gains			
Pensions and Annuities (taxable amount)			
IRA distributions (excluding rollovers)			
Rental income			
Taxable Social Security Benefits			
Unemployment compensation			
TOTAL TAXABLE INCOME FOR 2014			
UNTAXED INCOME FOR JANUARY 1, 2014 TO DECEMBER 31, 2014	ACTUAL 01/01/14 - Today	ESTIMATED Today – 12/31/14	TOTAL Actual + Estimated
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S			
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans			
Child support received for all children. Do not include foster care or adoption payments.			
Tax exempt interest			
Untaxed portions of pensions, annuities, and IRA distributions			
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)			
Veterans' non-educational benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work Study Allowances			
Any other untaxed income not reported elsewhere on this form, such as workers' compensation, disability, etc. DO NOT include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.			
TOTAL UNTAXED INCOME FOR 2014			
Child support paid during 2014 (attach documentation of amount paid)			
Taxable earnings from Federal Work Study or other need based work programs			

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Student Last Name	First	M.I.	OSU Student ID#
<u>Student Estimated Family Contribution Change Form</u>			

Report all income you have actually received from January 1, 2014 through today. Then estimate all income you expect to receive from today through December 31, 2014. **YOU MUST ATTACH DOCUMENTATION OF ALL ACTUAL INCOME.** Documentation could include most recent pay stubs with year-to-date earnings, W-2 forms, a letter from an employer stating your total earnings, an estimate of future income, etc. **After December 31, 2014**, you must: 1) Submit a copy of your completed 2014 Federal Tax Return Transcript; and 2) Complete only the **ACTUAL** column below.

TAXABLE INCOME FOR JANUARY 1, 2014 TO DECEMBER 31, 2014	ACTUAL 01/01/14 - Today	ESTIMATED Today – 12/31/14	TOTAL Actual + Estimated
2014 income earned from work by student (<i>wages, salaries, tips</i>)			
2014 income earned from work by spouse (<i>wages, salaries, tips</i>)			
Interest income and dividends			
Alimony received			
Business and/or farm income			
Capital Gains			
Pensions and Annuities (taxable amount)			
IRA distributions (excluding rollovers)			
Rental income			
Taxable Social Security Benefits			
Unemployment compensation			
TOTAL TAXABLE INCOME FOR 2014			
UNTAXED INCOME FOR JANUARY 1, 2014 TO DECEMBER 31, 2014	ACTUAL 01/01/14 - Today	ESTIMATED Today – 12/31/14	TOTAL Actual + Estimated
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S			
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans			
Child support received for all children. Do not include foster care or adoption payments.			
Tax exempt interest			
Untaxed portions of pensions, annuities, and IRA distributions			
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)			
Veterans' non-educational benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work Study Allowances			
Any other untaxed income not reported elsewhere on this form, such as workers' compensation, disability, etc. DO NOT include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.			
TOTAL UNTAXED INCOME FOR 2014			
Child support paid during 2014 (attach documentation of amount paid)			
Taxable earnings from Federal Work Study or other need based work programs			