

IUPUI and IUPUC Special Circumstance Appeal: 2009-2010 Academic Year

If your financial situation has changed substantially during the past year or since completing the federal aid application (FAFSA), you can submit a Special Circumstance Appeal form for reconsideration of your financial need for the 2009-2010 Aid Year (fall 2009 and/or spring 2010).

Who should file an appeal?

Any student or family whose financial situation has changed from 2008 to 2009 can apply to be reviewed for a change in the financial need analysis for the student. An approved appeal may either reduce the Estimated Family Contribution (EFC) or increase the overall Cost of Attendance (COA) for the student.

COST OF ATTENDANCE (COA) CHANGE

If you are attempting to increase the overall COA, the following items may be taken into consideration.

- Vehicle repair/mileage expenses
- Computer purchase
- Dependent care allowance
- Lodging/Transportation for 3rd + 4th Year Away Rotation (Med only)
- Professional licensure exams (grad students only)

NOTE: An increase in your COA does not allow for an increase in any financial aid award if you have already been awarded the maximum annual Direct Stafford loan amount. However, students may pursue private/alternative loan options up to the new COA. For example: a dependent undergraduate freshman student who has already received a Direct Stafford Loan for \$5500 during the 09-10 aid year cannot receive additional Stafford Loan funding due to a change in COA.

Sections 1 – 7: Completing section 1, 2, 3, 4, 5, 6 and/or 7 may allow an increase in your cost of attendance (COA).

If you feel this form does not fully reference your special circumstance and would still like the Office of Student Financial Aid Services to review your situation, please turn in a typed narrative explaining the situation with supporting documentation and we will review your situation. Please also fill out the appeal form with your name, student ID, e-mail address and appropriate signatures.

Checklist of Items Needed for the Appeal

- Appeal Form completed and signed
- Typed narrative that details the reasons for the special circumstance review
- Any documentation necessary to support the appeal (see form)

ESTIMATED FAMILY CONTRIBUTION (EFC) CHANGE

If you are attempting to reduce the EFC, the following items may be taken into consideration.

- Unusual medical and/or dental expenses
- Parent's enrollment in postsecondary education program
- Unusual debts
- Decrease in income
- Nonrecurring income
- Separated, divorced, or widowed since filing FAFSA

NOTE: Students that already have a \$0 Estimated Family Contribution (EFC) should NOT submit an appeal. These students have already been given the maximum amount of financial aid.

Sections 8 – 13: Completing sections 8, 9, 10, 11, 12, and/or 13 may allow for a decrease in your estimated family contribution (EFC). This may impact the Pell grant or enable you to receive more subsidized Stafford funds, if you have not received the maximum amount. If requesting professional judgment based on sections 10, 11, 12, or 13 you must also complete and submit the Calendar Year 2009 worksheet at the end of this form.

Submission: Please submit your application, typed narrative explaining the situation, and supporting documentation to the Office of Student Financial Aid Services to determine if you are eligible for a professional judgment adjustment. You will receive an e-mail notification at your IUPUI or IUPUC account of the decision within 10 to 15 business days. Reviews for the 09-10 Academic year will not begin until August 10th, 2009.

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APPLICANT INFORMATION (PLEASE PRINT)

Student Name: _____

University ID: _____

IUPUI or IUPUC e-mail address: _____

I am attempting to _____ decrease my Estimated Family Contribution (EFC) _____ increase my Cost of Attendance (COA)
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AFFIRMATION STATEMENT (SIGN & DATE)

My signature below indicates that information on this form and the supporting documentation submitted are true and accurate to the best of my knowledge. I authorize the Office of Student Financial Aid Services to verify this information. I understand that providing false information can result in the cancellation or repayment of financial aid.

I understand that increasing my COA does not allow for an increase in any financial aid award if I have already been awarded the maximum annual Direct Stafford loan amount. However, I may pursue private/alternative loan options up to the new COA. I understand that decreasing my EFC may impact the Pell grant or enable me to receive more subsidized Stafford funds if I have not received the maximum amount. All steps taken above are dependent upon my submission of appropriate and complete documentation necessary for review of this special circumstance appeal.

NOTE: If the special circumstance is associated with the student's spouse or parent, the student's spouse or parent's signature is required.

Signature of Student + Date: _____

Signature of Spouse + Date: _____

Signature of Parent + Date: _____

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Worksheet: Calendar Year 2009

Instructions: This worksheet is required if you are requesting professional judgment based on sections 10, 11, 12, and 13. Based on your FAFSA status of dependent or independent status, enter values in the appropriate columns. Enter a zero (0) in any box with no income. **Please DO NOT leave any space blank.** DO NOT include Federal Work Study dollars.

Income for January 1, 2009 to December 31, 2009	Dependent Student		Independent Student	
	Jan. 1, 2009 – Today	Today – Dec, 31, 2009	Jan. 1, 2009 – Today	Today – Dec, 31, 2009
Student’s gross earnings. (wages, salaries, net business or farm income)				
Spouse’s gross earnings. (wages, salaries, net business or farm income)				
Father’s gross earnings. (wages, salaries, net business or farm income)				
Mother’s gross earnings. (wages, salaries, net business or farm income)				
Other taxable income (which may include, but is not limited to dividends, interest, pensions, alimony, unemployment comp., capital gains, payments to tax-deferred pension and savings plans, IRA deductions, Keogh, child support received, etc.)				
Any other untaxed income and benefits: (Which may include, but is not limited to TANF, Military or Clergy living allowances, veteran’s non-education benefits, etc) Don’t include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g. cafeteria plans.				
TOTAL				