IUPUI and IUPUC Special Circumstance Appeal: 2010-2011 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 2010-2011 Aid Year (fall 2010 and/or spring 2011).

Who should file an appeal?
Any student or family whose financial situation has changed from 2009 to 2010 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
- 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/Parent PLUS/Grad PLUS loan options up to the new COA. For example: a dependent undergraduate freshman student who has already received a Direct Stafford Loan for $55000 during the 10-11 aid year cannot receive additional Stafford Loan funding due to a change in COA.

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.

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 2010-11 Academic Year will not begin until September 13th.

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)
- Copy of signed federal income tax return (for all EFC changes)
Documentation Requirements

**COST OF ATTENDANCE CHANGE**  Charges must occur between August 23, 2010 and May 8, 2011

Transportation-related items:
- **Vehicle Repair Expenses**: Itemized bill(s) and copy of payment information (e.g. receipt) including date. Must prove that charge has been paid.
- **Mileage Expenses**: None. However, you must live outside Marion County if you are an IUPUI student or outside Bartholomew County if you are an IUPUC student. We will calculate mileage based on your address of record in OneStart.

Dependent child care: Invoice from provider and/or cancelled check or payment receipt with dates.

Purchase of a personal computer: Receipt listing computer purchase with verification of payment with dates.

Student housing change from living with parent to living off/on campus in a separate household: Copy of lease agreement or other bill showing household charges.

Cost for professional licensure exams (e.g. NERM, WREB, or law BAR) for graduate students in the School of Dentistry, Law, or Medicine: Receipt listing professional licensure examination with verification of payment with dates.

**ESTIMATED FAMILY CONTRIBUTION CHANGE**

Uninsured/Unusual medical costs for 2009 or 2010: Receipt(s) listing uninsured medical costs with verification of payment with dates during either 2009 or 2010. Must include dated & signed Federal Tax return and/or Schedule A for appropriate tax year. Must have proof that charges have been paid.

Parent attending college (degree-seeking status, enrolled at least ½ time during the fall 2010/spring 2011): Evidence of enrollment (fall 2010/spring 2011) listing coursework and credits with detailed bill and payment statement for each enrollment period. Parent must not be receiving employer reimbursement.

Decrease in Income from 2009 to what was expected in 2010: Attached worksheet and dated/signed 2009 Federal Income Tax returns AND letter from employer listing last day of employment and a copy of the last paycheck stub and payroll schedule (weekly, biweekly, or monthly) OR other evidence that individual is receiving unemployment benefits. If re-employed, attach a statement with the first date of employment and copy of the most recent paycheck stub and payroll schedule. If employed, but significant decrease present, provide copies of paystub from comparable pay periods in 2009 and 2010 to show amount currently being earned is less than before.

Loss of untaxed income from 2009 to what was expected in 2010: Attached worksheet and dated/signed 2009 Federal Income Tax returns, and documentation of loss untaxed income (e.g. loss of child support received, worker’s compensations, etc.) in 2010 with effective date.

Loss of nonrecurring income or increase of unusual debts from 2009 to what was expected in 2010: Attached worksheet and dated/signed 2009 Federal Tax returns & documentation of situation (e.g. One-time disbursements from IRA, unexpectedly high debt due to job loss, etc.) in 2010 with effective date.

Separated, divorced, or widowed since filing 2010-2011 FAFSA: Attached worksheet and dated/signed 2009 Federal Income Tax returns, and documentation of separation, divorce, or death certificate.
**IUPUI and IUPUC Special Circumstance Appeal: 2010-2011 Academic Year**

Student Name: _______________________________________  University ID: ________________________

IUPUI or IUPUC e-mail address: __________________________________________________________

<table>
<thead>
<tr>
<th>Circumstance</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle repair expenses</td>
<td>Total cost of repairs: $</td>
</tr>
<tr>
<td>Car mileage</td>
<td># days/week commute:</td>
</tr>
<tr>
<td>Dependent/Child Care expenses</td>
<td>Total cost: $</td>
</tr>
<tr>
<td>Housing change</td>
<td></td>
</tr>
<tr>
<td>Personal computer purchase</td>
<td>Total cost: $</td>
</tr>
<tr>
<td>Professional licensure exam</td>
<td>Total cost: $</td>
</tr>
</tbody>
</table>

I am attempting to decrease my ESTIMATED FAMILY CONTRIBUTION due to...

- Unusual medical/dental expenses (paid only)  total cost: $________
- Parent in college (Dependent students only)
- Decrease in income for (check):  parent  student  spouse
- Loss of untaxed income (check):  parent  student  spouse
- Loss of non-reoccurring income (check):  parent  student  spouse
- Separated, divorced, or widowed  parent  student

Marital Status:  Effective date of Marital Status:  
Income earned by spouse in 2010 up to date of effective status: 

**AFFIRMATION STATEMENT (SIGN & DATE)**

My signature indicates that information submitted is 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 financial aid if I have already been awarded the maximum annual Direct Stafford loan amount.** However, I may pursue private/alternative/Parent PLUS/grad PLUS 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.

Signature of Student + Date: __________________________________________________________

Signature of Spouse: ___________________________  Signature of Parent: ___________________________
Worksheet: Calendar Year 2010

**Instructions**: The chart below is required if you are requesting adjustments to your Estimated Family Contribution. 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.

<table>
<thead>
<tr>
<th>Income for January 1, 2010 to December 31, 2010</th>
<th>Dependent Student</th>
<th>Independent Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student’s gross earnings. (wages, salaries, net business or farm income)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Spouse’s gross earnings. (wages, salaries, net business or farm income)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Father’s gross earnings. (wages, salaries, net business or farm income)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Mother’s gross earnings. (wages, salaries, net business or farm income)</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Income earned solely through unemployment compensation</td>
<td>Mother= $_______</td>
<td>Mother= $_______</td>
</tr>
<tr>
<td></td>
<td>Father= $_______</td>
<td>Father= $_______</td>
</tr>
<tr>
<td>Other taxable income (which may include, but is not limited to dividends, interest, pensions, alimony, capital gains, payments to tax-deferred pension and savings plans, IRA deductions, Keogh, child support received, etc.)</td>
<td>Mother= $_______</td>
<td>Mother= $_______</td>
</tr>
<tr>
<td></td>
<td>Father= $_______</td>
<td>Father= $_______</td>
</tr>
<tr>
<td>NOTE: Do NOT include unemployment compensation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td>Mother= $_______</td>
<td>Mother= $_______</td>
</tr>
<tr>
<td></td>
<td>Father= $_______</td>
<td>Father= $_______</td>
</tr>
<tr>
<td>TOTAL</td>
<td>Student= $_______</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>Parents= $_______</td>
<td>$</td>
</tr>
</tbody>
</table>