

2020 – 2021 Special Circumstances Form for Returning Students

Office of Financial Aid

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Name: _____ RWU ID #: _____

Last First MI

We appreciate that the Free Application for Student Aid (FAFSA) may not present an accurate picture of your unique financial situation and resources available. This Special Circumstances Consideration form allows you to supplement your FAFSA information or document any financial circumstances that have changed or arisen since your FAFSA was filed. The RWU FA Appeals Committee will reevaluate your eligibility for additional federal, state or institutional aid in the context of the information you provide. Our financial aid staff may require further documentation and will work with your family to make sure you are receiving the fullest consideration for aid eligibility while adhering to federal, state, and institutional policies and guidelines.

Complete both pages of this form, attaching detailed documentation that best explains the nature of your situation. Keep in mind:

- (1) The student must complete the FAFSA before the FA Appeals Committee can review this appeal.
- (2) Filing this form does not guarantee an adjustment to your financial aid package.
- (3) If your FAFSA was selected for federal verification, you must complete that process **before** your appeal is reviewed.
- (4) Decisions of the Appeals Committee are final. Further appeals will be reviewed when newer information or circumstances arise.

Special Circumstances for Consideration

INSTRUCTIONS: Please review and indicate below which special circumstance applies to you based on your status as a dependent or independent student. **Check all that apply and provide as much supplemental material as possible.** Information noted below as *Required Documentation* must be submitted with this form to avoid delays in our ability to make a timely appeal determination.

<input type="checkbox"/> Merit Consideration	Students appealing a scholarship decision should provide new and compelling academic information that was not previously included in their applications, or extenuating personal circumstances, they feel warrant a change in the scholarship decision.		
Special Circumstance	For Dependent Students	For Independent Students	Required Documentation
<input type="checkbox"/> Loss of Employment	2019-2020 income earned by you or your parent(s) will be less than that earned in 2018	2019-2020 income earned by you and/or your spouse will be less than that earned in 2018	Complete signed copies of: <ul style="list-style-type: none"> - Last pay stub showing year-to-date earnings - Copy of termination notice from employer - Unemployment benefit notice
<input type="checkbox"/> Other Loss of Income <ul style="list-style-type: none"> - Alimony - Child Support - Retirement/Pension - Social Security (Taxed) - Worker's Compensation 	You or your parent(s) received benefits in 2018 that have ceased or been reduced in 2019 or 2020	You and/or your spouse received benefits in 2018 that have ceased or been reduced in 2019 or 2020	Complete signed copies of: <ul style="list-style-type: none"> - Original 2018 benefit statement listing total amount received - Revised benefit statement listing updated amount to receive and effective date
<input type="checkbox"/> Separation or Divorce	Your parents separated or divorced AFTER filing the FAFSA, but not later than 12/31/20	You and your spouse separated or divorced AFTER filing the FAFSA, but not later than 12/31/20	Complete signed copies of: <ul style="list-style-type: none"> - Divorce decree or separation agreement or proof of separate addresses (i.e. utility bill / lease)
<input type="checkbox"/> Death of Parent or Spouse	A parent has died AFTER filing the FAFSA	Your spouse has died AFTER filing the FAFSA	Complete signed copies of: <ul style="list-style-type: none"> - Applicable death certificate
<input type="checkbox"/> Medical / Dental Expense <ul style="list-style-type: none"> - Dependent child, parent who resides with you, self 	Paid 2018 medical expenses by you or your parent(s) were over 7.5% of your AGI	Paid 2018 medical expenses by you or your spouse were over 7.5% of your AGI	Complete signed copies of: <ul style="list-style-type: none"> - Proof of all paid out-of-pocket expenses for 2018
<input type="checkbox"/> COVID-19 <ul style="list-style-type: none"> - Temporary layoff or furlough - Lost wages due to illness, quarantine, or shelter-in-place related to COVID-19 	Your or your parent(s) employer closes for a period of time, laying off or furloughing staff due to COVID-19; or You or your parent(s) have lost wages due to illness related to COVID-19, a quarantine period or shelter-in-place order; or You or your parent(s) are unable to work because of illness (e.g. impaired lung function prevents a parent from engaging in substantial gainful activity).	Your and/or your spouse's employer closes for a period of time, laying off or furloughing staff due to COVID-19; or You and/or your spouse have lost wages due to illness related to COVID-19, a quarantine period or shelter-in-place order; or You or your spouse are unable to work because of illness (e.g. impaired lung function prevents a parent from engaging in substantial gainful activity).	Complete signed copies of: <ul style="list-style-type: none"> - Letter from employer documenting employment status change and if applicable date of unemployment/closure of business - Copies of statements indicating severance pay and any other amounts family is eligible from the federal stimulus payment - Last 2020 pay stub showing year-to-date earnings - Unemployment benefit notice showing weekly eligible income - Other supporting documents
<input type="checkbox"/> Other Consideration	On a separate page, please detail your other circumstances that have not been defined on this sheet, (i.e. private secondary school expenses for younger siblings, care costs for elderly parents, etc.)		

STEP 1: Projected Income and Benefits. You must provide the following information, including the best estimate of the changes in the financial situation for yourself and/or your parent(s) for one of the time periods indicated below.

Please check the tax year for which your estimated income is being provided:

- ☐ 2019 (1/1/2019 through 12/31/2019)
☐ 2020 (1/1/2020 through 12/31/2020)

Source of Income	Student	Father / Stepfather	Mother / Stepmother	Student's Spouse
Wages, Tips, Salary				
Interest and/or Dividend Income				
Unemployment Compensation				
Worker's Compensation				
Pensions and/or Annuities				
Severance Pay				
Retirement Benefits				
Disability Benefits (taxable)				
Social Security Benefits (taxable)				
Child Support				
Alimony				
Total of all income	\$	\$	\$	\$

STEP 2: Explanation of Special Circumstances. Attach a signed, written statement detailing the specifics of your circumstances and providing any pertinent information that will help us better understand your particular situation.

STEP 3: Signed Statement of Certification

I certify that the information provided here is correct to the best of my knowledge and that I have attached all appropriate documentation. I understand that the factors in determining a family's contribution are based on laws and guidelines by the Federal Government and the University. I understand these guidelines are the same for all who are in similar economic situations. Furthermore, I understand that submission of my appeal does not automatically qualify me for an increase in funds. All persons providing information must sign below.

Student's Signature

Date

Student's Spouse's Signature (if applicable)

Date

Parent's Signature (if student is dependent)

Date

Important notes about submitting an appeal due to special circumstances:

1. If you filed your 2020-2021 FAFSA and received an EFC = Zero (0), you already received the **maximum in federal aid**. Submitting this appeal **may result in an increase in RWU institutional aid only**.
2. If the estimated income for 2019 or 2020 is approximately the same or higher, (due to receiving unemployment, severance pay, other untaxed income, etc.), than the 2018 income listed on the FAFSA, submitting this appeal **will not** produce a change to your financial aid offer.
3. Some aid funding awarded on appeal is based on a one fiscal-year status, while other awards may be renewable. Each circumstance is reviewed on an individual basis.