

# Appeal for Special Circumstance Policy

## Appeal Policy

Your eligibility for financial aid was initially calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). Using this information all families undergo a consistent evaluation of the family's ability to pay for college. The formula assumes that 2017 income is a good indicator of the family's financial strength during the student's 2020-2021 enrollment.

Student Financial Services at Marietta College recognizes that families experience changes in income or other family circumstances that are not reflected in the 2018 tax return information. Therefore it is possible for students to appeal their financial aid eligibility if they have special financial circumstances.

### Examples of Special Circumstances considered:

- Reduction of income or benefits in 2020.
- Extraordinary medical or dental expenses in 2018.
- Death of a parent or spouse whose information is on the FAFSA form.
- Divorce or separation after filing the 2020-2021 FAFSA form.
- Natural Disaster expenses not covered by Insurance

### Examples of Special Circumstances not considered:

- Home repairs
- Private school tuition
- Credit card debt
- Mortgage payments
- Weddings and other major purchases
- Car payments
- Previous educational loan debt

Please remember, granting appeals is based on a one-time special circumstance. It also depends on the availability of funds and the timeliness of your FAFSA. Submitting this form does not guarantee an adjustment or increase in your financial aid. In the event that we are not able to offer additional financial aid please review the alternative financing options and payment plans available to help finance your education. Information regarding loans is available on our website at <http://www.marietta.edu/tuition-financial-aid>. The interest free payment plan is available and information is located at <http://www.marietta.edu/payment-options>.

Appeals are reviewed within 30 days after receipt of all required and supporting documentation. However, response times may vary depending on volume of appeals at the time of your request.

✦ If you determine that your 2020 income will be the same or higher than 2018's do not complete this form.

✦ Please do not disregard your Marietta College bill due date while waiting for the appeal decision. ✦

#### Office of Student Financial Services

2020-2021

Marietta College

215 Fifth Street

Marietta, OH 45750

Phone: 1-800-331-2709

Fax: 740-376-4990

Web: <http://www.marietta.edu/tuition-financial-aid>

Email: [finaid@marietta.edu](mailto:finaid@marietta.edu)

# Appeal for Special Circumstance Form



Office of Student Financial Services  
2020-2021

Name: \_\_\_\_\_ Student ID: \_\_\_\_\_  
Last, First MI

Email: \_\_\_\_\_ Telephone Number: ( ) \_\_\_\_\_ - \_\_\_\_\_

**A. Did you file a financial aid appeal during the 2019-2020 Academic Year?**  YES  No

## B. Appeal Categories and Supporting Documentation:

Carefully read and select the categories from the following list that most closely describe your special circumstance(s) and provide all supporting documents. Incomplete appeals will not be considered after 60 days.

★ **2017 Federal Tax Return Transcripts are REQUIRED, unless the IRS Data Retrieval Tool was used, for all Appeals for Special Circumstance.** ★

Type of appeal (check all that apply)	Documentation to include with appeal
<input type="checkbox"/> <b>Decrease in student/spouse income from employment in 2020 of at least 8 weeks.</b>	<ul style="list-style-type: none"> <li>• Statement documenting retirement benefits for 2020.</li> <li>• Letter from employer documenting employment status (e.g. full-time to part-time or termination).</li> <li>• Unemployment Benefits statement.</li> <li>• Last pay stub after separation from job. If after January 1<sup>st</sup>, 2020, please submit copies of 2019 W-2s.</li> <li>• Copies of statements indicating severance pay.</li> </ul>
<input type="checkbox"/> <b>Decrease in parent income from employment in 2019 of at least 8 weeks.</b>	<ul style="list-style-type: none"> <li>• Statement documenting retirement benefits for 2020.</li> <li>• Letter from employer documenting employment status (e.g. full-time to part-time or termination).</li> <li>• Unemployment Benefits statement.</li> <li>• Last pay stub after separation from job. If after January 1<sup>st</sup>, 2020, please submit copies of 2019 W-2s.</li> <li>• Copies of statements indicating severance pay.</li> </ul>
<input type="checkbox"/> <b>Unreimbursed medical or dental expenses paid in 2017. Must exceed 11.5% of AGI.</b>	<ul style="list-style-type: none"> <li>• Provide a summary of PAID unreimbursed expenses (deductibles, co-pays, after tax insurance, prescription medications, expenses for durable medical equipment, and other amounts not covered by insurance) for 2018.</li> <li>• Cobra payments made in 2019.</li> <li>• <b>*Elective cosmetic or dental expenses will not be considered.*</b></li> </ul>
<input type="checkbox"/> <b>Death of immediate family member whose information is on the FAFSA.</b>	<ul style="list-style-type: none"> <li>• Provide copies of 2017 W-2 forms.</li> <li>• Provide copy of Death Certificate</li> </ul>
<input type="checkbox"/> <b>Divorce or separation after filing the 2019-2020 FAFSA.</b>	<ul style="list-style-type: none"> <li>• Complete copy of divorce decree or complete copy of separation agreement. If no legal separation documentation exists, provide a statement indicating the date of the separation.</li> <li>• Provide documentation for <u>both parents'</u> living expenses at different addresses (e.g.: rental agreement, lease or mortgage statement and utility bills).</li> <li>• Provide agreement of financial support payments (e.g. alimony, spousal support, child support or dependent care).</li> <li>• List the number of family members currently in the household.</li> <li>• Copies of 2018 W-2 forms.</li> </ul>
<input type="checkbox"/> <b>Natural Disaster Expenses not covered by Insurance</b>	<ul style="list-style-type: none"> <li>• Copies of all expenses regarding natural disaster.</li> <li>• Copies of what is covered by insurance.</li> </ul>

# Appeal for Special Circumstance Form



Marietta College

Office of Student Financial Services  
2020-2021

Student ID: \_\_\_\_\_

## C. Income Information For 2020:

The following section requires you to provide your actual and expected 2020 income. Do not put hourly wage. Instead, please compute the full amount you have or will receive.

Expected 2018 Income	Student	Spouse	Father/ Stepfather	Mother/ Stepmother	Documents Required
Gross Income EARNED from work: 1/1/2020 through present date	\$	\$	\$	\$	Current or Final Pay Stub
Gross Income TO BE EARNED from work: present date through 12/31/2020	\$	\$	\$	\$	Current Pay Stub
Severance Pay	\$	\$	\$	\$	Letter from Company
Unemployment Benefits	\$	\$	\$	\$	Documentation from Agency
Workman's Comp Benefits	\$	\$	\$	\$	Documentation from Agency
Pension Distributions	\$	\$	\$	\$	Pension Statement
Business Income	\$	\$	\$	\$	Letter from Accountant or Quarterly Statement
Alimony	\$	\$	\$	\$	Letter from Court
Child Support Received	\$	\$	\$	\$	Letter from Court
Early Withdrawal from Retirement Funds	\$	\$	\$	\$	Letter outlining how funds were used
<b>Total Expected 2020 Income:</b>	\$	\$	\$	\$	

\*Do not include the value of on-base military housing or the value of a basic military allowance for housing.

# Appeal for Special Circumstance Form



Student ID: \_\_\_\_\_

## D. Personal Statement:

Explain below what has caused the changes in your family's circumstances. Attach a separate sheet if necessary. Remember to write your name and Student ID on each page.

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Please submit completed form with supporting documentation to Student Financial Services, 215<sup>th</sup> Street, Marietta, OH 45750, no later than:

✦ **November 1, 2020** - if your appeal is for the 2020-2021 Academic Year

✦ **April 2, 2021** - if your appeal is for the spring 2021 semester only.

If any information or documents are missing or incomplete, your appeal can not be processed.

## F. Signature and Certification:

I certify that the information submitted for this appeal is true and complete to the best of my knowledge. I agree to provide all supporting documentation required. I understand that failure to comply may result in the cancellation of this appeal. I further understand that if I have provided information in previous appeals, this may be reviewed for accuracy and it may impact the outcome of this and or any future appeal. It is the family's responsibility to notify our office if any of the above information should change. This notification should occur within two weeks of any change.

✦ **Please do not disregard your Marietta College bill due date while waiting for the appeal decision.** ✦

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Required for Dependent Student)

Fax completed signed form to: 740.376.4990

or email to: [finaid@marietta.edu](mailto:finaid@marietta.edu)

(Attachments must be a standard image file, or in one of the following file formats: .doc, .docx, .pdf)