

Special Circumstance Appeal Form

(Please use black or blue ink to complete this form)

Student First Name _____ M.I. _____ Last Name _____ University ID Number _____

Indiana State University recognizes that situations occur which may affect a student's eligibility for need-based financial aid. Complete this form if you have special circumstances which have resulted in a reduction in resources or a decrease in disposable income for calendar year 2017 or 2018. Note: Not all special circumstances will result in additional financial aid. You know your family finances better than we do. Therefore, review your household income for 2017 and the anticipated income for 2018. You will need to tell us which year to base your appeal on. We cannot co-mingle years. Check the box for the appropriate year on page 2 of this form.

SECTION A. Complete the following steps:

1. Provide a written signed statement that explains your special circumstance. Include an explanation of how you arrived at the figures listed on page 2.
2. If you are a Dependent Student – Complete a Dependent Verification Form and provide 2016 Tax Return Transcripts for both yourself and your parent(s). Tax Return Transcripts can be obtained at www.irs.gov or call 800-908-9946.
3. If you are an Independent Student – Complete an Independent Verification Form and provide 2016 Tax Return Transcripts for yourself and/or your spouse, if married. Tax Return Transcripts can be obtained at www.irs.gov or call 800-908-9946.
4. On Page 2 of this form, complete the actual income if using 2017 or complete the estimated income if using 2018. Please report your Gross or Estimated Gross income (income before taxes) on the appropriate lines. If a source of income does not apply to you enter zero (0).
5. Provide documentation to verify each item listed on page 2. If using 2017 please provide an IRS 2017 Tax Return Transcript. If using 2018 please provide most recent or final pay stub, verification of pay received from various agencies such as Unemployment, Worker compensation, or disability.
6. Additional supporting documentation may be submitted to support your case. This documentation could include: letters from employers, death certificates, statements from insurance companies, proof of medical bills and payments, divorce decree or separation arrangements, Tax Schedules such as Schedule A to show medical expenses, Letters from an Attorney, statement from an Accountant, etc.

SECTION B. Examples of Special Circumstances that can be considered:

- Loss of employment
- Decrease in wages or salary
- Death or divorce of a spouse or parent
- Exceptions to normal income (lottery, inheritance, IRA/Pension one time distribution)
- Unusually high medical/dental expenses not covered by insurance (does not include insurance premium)
- Other unusual circumstances

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M.I.

Last Name

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SECTION C. Income information: Select one option and complete the chart

I would like to base the review on our ACTUAL income in 2017; complete Column A

I would like to base the review on our ESTIMATED income for 2018; complete Column B

Income	Column A 2017 Gross Earnings	Column B 2018 Estimated Gross Earnings
Father/Stepfather (Earned Income from work)	\$	\$
Mother/Stepmother (Earned Income from work)	\$	\$
Student (Earned Income from work)	\$	\$
Spouse (Earned Income from work)	\$	\$
Interest/Dividend Income	\$	\$
Unemployment Compensation	\$	\$
Severance Pay	\$	\$
Workers' Compensation/Disability Benefits	\$	\$
Alimony	\$	\$
Other Taxable Income (specify source):	\$	\$
Non-Educational Veterans benefits	\$	\$
Child Support	\$	\$
Other Untaxable Income (specify source):	\$	\$

SECTION D: Certification and Signatures

(Electronic signatures will not be accepted)

Certification Statement: (If you are a dependent student, you and one of your parents must sign) I/We certify that all of the information reported on this worksheet is complete and correct.

Student Signature (Required)

Date

Parent Signature (Required if dependent)

Date

WARNING: If you purposely give false or misleading information on this form, you may be fined, sentenced to jail or both.

For priority processing, please submit ALL required documents by:

Fall: August 1, 2018

Spring: November 15, 2018

Summer: April 15, 2019

Documents submitted after these dates are not guaranteed to be processed prior to the start of classes.

ATTENTION: If additional information is needed, a financial aid staff member will e-mail the student's ISU e-mail account. Allow 10-14 business days for processing.