



University of New Haven

2023-2024 Special Circumstances Appeal Instructions (Dependent Students)

If you believe you have extenuating circumstances which were not considered as a part of your financial aid application, or if you can now document a significant change in your family's financial situation, you may submit a Special Circumstances Appeal form. Please be aware, both federal and institutional guidelines require that financial aid appeals fall within specific parameters and are accompanied by supporting documentation. The results of your appeal will be based on the circumstances described, as well as the quality of supporting documentation provided.

**** Submission of an appeal does not guarantee an adjustment to a student's financial aid award ****

NOTE: We are unable to consider an appeal for circumstances that include, but are not limited to:

- ◆ High consumer debt (credit card debt, mortgage debt, personal loans, etc.)
- ◆ Lifestyle expenses (pets, cars, vacations, weddings, sports, etc.)
- ◆ Expenses that have not yet occurred
- ◆ Educational expenses for parents, siblings and/or other family members, including private elementary or secondary school tuition
- ◆ Expenses for grandparents, relatives, siblings, children or other family members not in your household

If your situation meets one of the circumstances listed, go to the appropriate section to complete the worksheet as well as view appropriate documentation needed to support your appeal:

- Death of Parent (Section 1)
- Involuntary Loss of Income (Section 2)
- Divorce or Separation of Parents (Section 3)

ALL APPEALS REQUIRE THE FOLLOWING ITEMS PRIOR TO REVIEW

1. **A detailed letter to the Financial Aid Office** explaining your appeal request. Be sure to include all relevant information, such as the date circumstances occurred, specific details regarding the special circumstance and any other information to support your request. You may provide documentation, even if it is not specifically asked for on this form, if you feel it will strengthen your appeal.
2. **A copy of your 2021 IRS Tax Return Transcripts or Signed Tax Return Forms** for both parent(s) and student. Your IRS Tax Return Transcript can only be obtained directly from the Internal Revenue Service (IRS). You can contact the IRS by visiting www.irs.gov, calling the IRS at 1-800-829-1040 to speak with a representative, calling their automated line at 800-908-9946 or possibly by visiting a local IRS office.
3. **Signed and complete Certification of Special Circumstance Appeal Form**

2023-2024 Special Circumstances Appeal Form (Dependent Students)

Student Name (Last, First)

UNH Student ID #

Section I: Death of a Parent

Instructions: Select below the reason for your Special Circumstances Appeal, and submit to the Financial Aid Office this completed form along with all appropriate documentation for the specific circumstance. Make sure you include a letter detailing your situation.

<p>Death of a Parent: In which year did your parent pass away (Circle one):</p> <p style="text-align: center;">2021</p> <p style="text-align: center;">2022</p> <p style="text-align: center;">2023</p>	<p>Please provide the following documentation:</p> <ul style="list-style-type: none">• A separate letter detailing your circumstances• Copy of death certificate• Copy of 2021 or 2022 W-2 form of the deceased parent (whichever is applicable)• Provide information about any <u>income</u> you are receiving (social security benefits, pension or retirement funds, etc) resulting from this event.• Describe any pending or finalized changes in assets (including life insurance benefits received).
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Student Name (Last, First) _____

UNH Student ID # _____

Section 2: Involuntary Loss of Income

Instructions: Select below the reason for your Special Circumstances Appeal, and submit to the Financial Aid Office this completed form along with all appropriate documentation for the specific circumstance. Make sure you include a letter detailing your situation.

<p>Involuntary Loss of Wages or Employment: Involuntary loss of employment must exist for a period of more than 12 weeks before this appeal can be submitted.</p> <p>COVID -19 Related Loss of Income If you believe you have a loss of wages due to the Covid-19 pandemic, the 12 week appeal wait time is removed.</p> <p>Note: We are <u>unable</u> to consider a loss of wages resulting from termination of employment resulting from unethical behavior or from any voluntary termination.</p>	<p>Please provide the following documentation to support your appeal</p> <ul style="list-style-type: none"> A separate letter detailing your circumstances Copy of last pay stub from previous employer Copies of both parent's 2021 & 2022 W-2 forms Copy of letter from previous employer on company letterhead, verifying job status/change Copy of most recent pay stubs showing new or changed salary (if applicable) Complete projected income chart Copy of unemployment documentation and/or any employee severance benefits received /or expected If furloughed, documentaton of when salary resumes.
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Please complete the applicable Parent sections. *If second parent was reported on the FAFSA complete Parent 2 information:*

<p>Parent 1 Name _____</p> <p>Currently Working (Circle one): Yes No</p> <p><input type="checkbox"/> I can't work while my place of employment is closed</p> <p><input type="checkbox"/> I was furloughed</p> <p><input type="checkbox"/> I was terminated (will not return to position previously held)</p> <p><input type="checkbox"/> I am self-employed/Own business</p> <p><input type="checkbox"/> Other, please specify in your appeal letter</p>	<p>Parent 2 Name _____</p> <p>Currently Working (Circle one): Yes No</p> <p><input type="checkbox"/> I can't work while my place of employment is closed</p> <p><input type="checkbox"/> I was furloughed</p> <p><input type="checkbox"/> I was terminated (will not return to position previously held)</p> <p><input type="checkbox"/> I am self-employed/Own business</p> <p><input type="checkbox"/> Other, please specify in your appeal letter</p>
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If you are unable to provide copy of your 2022 Federal Taxes, please complete the following:
Projected 2022 Income

Enter below, as best as you can, the amount of income you received from January 2022 through December 2022. Enter zero or N/A (not applicable) where appropriate. **Do NOT leave any item blank.**

	Parent 1 Name:	Parent 2 Name:
Income from Work during 2022		
Unemployment Compensation		
Severance Pay		
Other taxable income, i.e. Interest/Dividend Income, Alimony, Pensions, Annuities		
Business or Farm or Partnership/S-Corp, Rental Real Estate, etc.		
Untaxed Income i.e. Child Support, Disability, Workmen's Compensation		

2023 Projected Income

Enter below, as best as you can, the amount of income you expect to receive from January 2023 through December 2023. This income can come from last paystubs, unemployment or other items listed on the prior page. Enter zero or N/A (not applicable) where appropriate. **Do NOT leave any item blank.**

	Parent 1 Name:	Parent 2 Name:
Income from Work during 2023		
Unemployment Compensation		
Severance Pay		
Other taxable income, i.e. Interest/Dividend Income, Alimony, Pensions, Annuities		
Business or Farm or Partnership/S-Corp, Rental Real Estate, etc.		
Untaxed Income i.e. Child Support, Disability, Workmen's Compensation		

2023-2024 Special Circumstances Appeal Form (Dependent Students)

Student Name (Last, First)

UNH Student ID #

Section 3: Divorce or Separation of Parents

Instructions: Select below the reason for your Special Circumstances Appeal, and submit to the Financial Aid Office this completed form along with all appropriate documentation for the specific circumstance. Make sure you include a letter detailing your situation.

<p>Divorce/Separation: Prior to July 1, 2023 your parents have become divorced or separated</p>	<p>Please provide the following documents based on your circumstance:</p> <p>If your parents are DIVORCED:</p> <ul style="list-style-type: none"> • Copy of divorce decree • Documentation that your parents permanently reside in separate residences. This must include official documents such as mortgage statements, utility bills, bank statements, driver's licences, etc. Note: Documentation must show that two separate households are maintained at two different physical addresses. • Copies of both parents 2021 & 2022 W-2 forms. <hr/> <p>If your parents are SEPARATED:</p> <ul style="list-style-type: none"> • A letter explaining when the separation occurred, whether the separation is permanent, whether there are plans to file for divorce, and who will be the primary custodial parent. • Official documentation indicating permanent separate residences for both parents and student. Note: Documentation must be official such as mortgage statements, utility bills, bank statements, driver's licenses, etc. All documents must show that two separate households are maintained at two different physical addresses. • Copies of both parent's 2021 & 2022 W-2 forms. • A statement detailing how marital assets (including cash, home, other real estate, business, etc.) are being divided between parents. • A statement about child support or alimony expected to be received or paid and to whom.
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Checklist regarding Submission of Required Documents

Please check appropriate boxes below:

- Detailed appeal letter explaining your special circumstance
- Appropriate section(s) completed regarding circumstance
- All supporting documentation
- 2021 Parent Federal Tax Return Forms (signed) or Transcripts
- 2021 Student Federal Tax Return Forms (signed) or Transcripts
2021 IRS Tax Return Transcripts will not be submitted due the following reasons:
 - The student was not required to file a 2021 Federal Tax Return
 - Parent 1 was not required to file a 2021 Federal Tax Return
 - Parent 2 was not required to file a 2021 Federal Tax Return

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Certification & Signatures

By signing below,

1. We affirm that the data contained on this form, and on all attached supporting documentation, is true and complete to the best of our knowledge.
2. We acknowledge that submission of an appeal does not guarantee an adjustment to the student's financial aid award.
3. We understand that payment arrangements must be in place for the bill to be paid on time, and we will not wait for the outcome of our appeal.
4. We agree to immediately notify the Financial Aid Office in writing if any of our projections change.

STUDENT NAME (print): _____

STUDENT SIGNATURE: _____ DATE: _____

PARENT NAME (print): _____

PARENT SIGNATURE: _____ DATE: _____

Return this form along with all required documentation to:

University of New Haven
Financial Aid Office
Bergami Hall
300 Boston Post Road
West Haven, CT 06516