



2024-2025

## Special Circumstance Appeal Form

Student Name: \_\_\_\_\_

Last 3 Digits of Student ID: \_\_\_\_\_

The University of Mount Union understands that special circumstances occur which may affect a student's financial aid eligibility. The financial aid office will review each request on an individual basis.

Please note that submission for review will not guarantee changes in your financial aid nor prevent any late charges that may be applied to a student's tuition account balance. **Please do not disregard your University of Mount Union bill due date while waiting for the appeal decision.**

**STEP 1: STUDENT AND PARENT TAX INFORMATION**

Submit **2022 & 2023 W2s, tax returns, and schedules 1, 2 & 3 (if applicable)** with this form for both the student and parent.

**STEP 2: CHECK YOUR CIRCUMSTANCE AND ATTACH THE REQUESTED DOCUMENTATION**

Special Circumstance	PLEASE ATTACH THE FOLLOWING DOCUMENTATION:
<input type="checkbox"/> <u>Loss or reduction in wages:</u> Recent loss/change of job or recently retired.	<ul style="list-style-type: none"> <li>• Documentation indicating the last day of work and any benefits received</li> <li>• Last pay stubs for parents, including the parent still employed</li> <li>• New employer pay stub showing new wages (if applicable)</li> <li>• Documentation of unemployment benefits</li> </ul>
<input type="checkbox"/> <u>Reduction or loss of other income:</u> Benefits received in the tax year on the FAFSA, such as alimony, (taxed) social security, workers' comp, retirement/pension, have ceased or been significantly reduced.	<ul style="list-style-type: none"> <li>• Original Benefit statement listing total amount received</li> <li>• Revised Benefit statement and/or court documents listing updated amount to receive and effective date</li> <li>• Documentation indicating the date of change</li> </ul>
<input type="checkbox"/> <u>Child Support:</u> Change in the amount of child support received or paid.	<ul style="list-style-type: none"> <li>• Current and previous court orders</li> </ul>
<input type="checkbox"/> <u>Divorce/Separation/Recently married after the FAFSA was filed</u>	<ul style="list-style-type: none"> <li>• Court paperwork and most recent pay stubs for parents</li> </ul>
<input type="checkbox"/> <u>Death of Parent or Spouse</u>	<ul style="list-style-type: none"> <li>• Death certificate and most recent pay stub for surviving parent</li> </ul>
<input type="checkbox"/> <u>Private School Tuition:</u> Paying for private school tuition for siblings.	<ul style="list-style-type: none"> <li>• Payments of private school tuition for <b>siblings</b> (<b>DO NOT include the prospective UMU student in these payments or calculation</b>)</li> <li>• Documentation showing tuition amount <b>PAID</b> during the tax year reflected on the FAFSA</li> </ul>



<input type="checkbox"/> <u>Medical Expenses NOT covered by insurance</u>	<ul style="list-style-type: none"> <li>• Proof of payment for out-of-pocket expenses or copy of Schedule A of 1040</li> <li>• Documentation from health insurance showing accumulated amounts paid towards annual deductible/out-of-pocket maximum</li> </ul>
<input type="checkbox"/> <u>Loss of one-time income:</u> You received one-time income that will not occur in the current tax year (e.g., rollover into a Roth IRA, moving expenses allowance, back-year Social Security payments, or a divorce settlement). Special circumstance consideration will not be given if this one-time income is a result of an inheritance, job bonus, or overtime compensation, gambling winnings, pension, capital gain, insurance settlements, or early distributions of retirement account	<ul style="list-style-type: none"> <li>• Contracts, agency notices, or legal papers that indicate the date your (or your spouse's) <b>one-time</b> income was received</li> <li>• The amount of income that came from that source</li> <li>• How that income was used</li> </ul>
<input type="checkbox"/> Other	<ul style="list-style-type: none"> <li>• Please provide detail in the letter for step 3 explaining your special circumstance and provide supporting documentation</li> </ul>

### STEP 3: EXPLANATION

Attach a letter explaining your circumstance. Please include the effective date.

### STEP 4: CERTIFICATION

After receiving all required documents, a review of your appeal information will be completed within 3-4 weeks. During the review period, you may be asked to provide additional information, in which case it may take additional time to complete the process. Once the Special Circumstance Appeal has been completed, you will be notified of any changes resulting from the appeal. **Please note that a recalculation in financial need does not guarantee that additional aid will be awarded.**

I/we certify that all information and documentation that I/we have provided pertaining to this appeal is true and complete.

Student \_\_\_\_\_ Date \_\_\_\_\_

Parent's signature is required for dependent student (as determined by the FAFSA)

Parent \_\_\_\_\_ Date \_\_\_\_\_

### STEP 5: EMAIL, MAIL, FAX, OR DROP OFF DOCUMENTS TO STUDENT FINANCIAL AID

**Email** documents to [finaid@mountunion.edu](mailto:finaid@mountunion.edu)

**Mail** to the Office of Student Financial Aid, 1972 Clark Ave, Alliance, OH 44601

**Fax** documents to (330) 829-2814

*Please do not send any personally identifiable information via email (e.g. Social Security Numbers, dates of birth, etc.)*

**Questions? Contact the Office of Student Financial Aid**

**(330) 823-2674** [finaid@mountunion.edu](mailto:finaid@mountunion.edu)