



Financial Aid Office
 Phone: 419-824-3732
 Fax: 419-517-8921
 Email: financialservices@lourdes.edu

2019-2020 Special Conditions Appeal Form

Student Name: _____ Student ID: _____

Contact Information: Phone _____ Email _____

Sometimes the information you filed on the FAFSA does not reflect your current financial situation or take into account an unusual circumstance with you and/or your family. In certain circumstances, the Lourdes Financial Aid Office may use professional judgment, on a case-by-case basis, to adjust the information you filed on your FAFSA so it better reflects your current situation. *NOTE: Even if an adjustment is made, it may not result in additional aid*

The Appeal process:

- Your 2019-2020 FAFSA must be on file with Lourdes University
- This completed Appeal form and any required documentation must be received
- Additional documents may be requested throughout the process

Timeline for Processing Special Conditions: The time needed to process these special situations can depend on several factors including the time of year, the amount and receipt of required documentation, and, if required, resubmission of data to the U. S. Department of Education. Please follow all instructions completely as missing information will delay the review of your appeal. You will be notified by email of the decision of this appeal. Also, if additional information is being requested, you will be contacted by email.

General Information Needed:

1. Provide a letter explaining your situation. Your letter should have a clear and detailed explanation of your circumstances.
2. Provide documentation that supports your case (see examples in the next section). We may also request additional information as needed.
3. If your FAFSA has been selected for the process of Verification, students requesting a Special Conditions Appeal must complete a process called Verification first. For Verification, you must provide copies of the following:
 - a. Your 2017 Federal tax transcripts, unless you transferred your tax information directly to your FAFSA using the IRS Data Retrieval Tool.
 - b. Your 2017 W-2's (and your parents' or spouse's, if applicable).
 - c. Verification worksheet, independent or dependent, based on your FAFSA dependency status. The worksheet form is available from the Financial Aid Office or www.lourdes.edu at the financial aid section under 'Forms.'
4. If *not* selected for Verification, please submit copies of the following documents:
 - a. Your 2017 1040 tax returns.
 - b. Your 2017 W-2's (and your parents' or spouse's, if applicable).

Basis for Appeal: Check all that apply.

Note: Contact our office if you have a special situation that is not covered here, including dependency status adjustments.

_____ **Unemployment.** Please provide documentation of unemployment status. This can be a letter from the previous employer or a statement from the unemployment office. Also, please provide documentation of the amount of unemployment benefits you, your spouse, or your parent will be receiving. If you are filing a new appeal due to termination of unemployment benefits, please provide a document from the unemployment office showing the termination date.

_____ **Marital status change.** If you are a dependent student and your parents' marital status changes because of divorce, separation, or death, you may request an adjustment. Please submit legal documentation that supports your claim. If you are independent and your marital status changes because of divorce, separation, or death, you may also request an adjustment. Please submit any legal documentation that supports your claim. If you get married *after* you file your FAFSA, we will not consider any adjustments based solely upon this reason.

_____ **Private school tuition paid.** If private elementary or high school tuition was paid by your family, you may request an adjustment. Please submit proof of payment from any private school where you paid tuition last year, a letter or statement showing payments.

_____ **Loss or reduction of income or benefits,** such as layoff, plant closing, reduction of hours, or termination. Please provide termination letter or loss of benefit notification. Please provide copies of three recent pay stubs showing decreased income, if applicable. If you are quitting employment or reducing hours to return to school, please provide a document from your employer stating the effective date, along with three recent pay stubs. For loss of child support, please provide a letter or court document stating termination of benefit.

_____ **Lump Sum/One time Payments.** Sometimes large sum one-time payments must be reported as taxable income on your federal tax return. For example, converting a regular IRA into a Roth IRA by transferring funds, the amount converted has to be reported even though you do not actually have additional income or assets available. Please submit a detailed letter and all supporting documentation of the conversion or roll over, including copies of official statements from banks or investment firms. If this was not rolled over, please provide documentation and detailed proof, such as receipts, of how the money was used.

_____ **High medical expenses.** If you *paid* over 11% of your adjusted gross income in medical and/or dental expenses, you may request an adjustment. You will need to show proof of your payments. Please note this does NOT include what is paid by your insurance, only what you have paid out of pocket is considered. Also, please note that only expenses *over* 11% of your adjusted gross income will be considered for an adjustment. A copy of your 2017 Schedule A is also accepted.

_____ **Other.** Please describe _____

Under the Higher Education Act of 1965, the Financial Aid Office has full discretion under the Professional Judgment clause to either approve or deny requests as they determine appropriate. An aid administrator's decision regarding adjustments is final and cannot be appealed to the Department.

CERTIFICATION:

Each person signing this form certifies that all the information reported on it is complete and correct. The student and at least one parent, if applicable, must sign and date.

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

Student: _____ Date: _____

Parent: _____ Date: _____

Please return to:

Lourdes University Financial Aid Office

6832 Convent Blvd.

Sylvania, OH 43560

419-824-3732

Fax: 419-517-8921 financialservices@lourdes.edu