

SPECIAL FINANCIAL CIRCUMSTANCES

Appeal Form Information and Instructions

Academic Year 2020-2021

appeal.mhec@maryland.gov

We recognize that the financial circumstances of students can change after they have completed and filed the 2020-2021 Free Application for Federal Student Aid (FAFSA). If your family has experienced a major reduction in income, the Office of Student Financial Assistance (OSFA) may be able to reevaluate your financial need based on your 2019 income or your total projected 2020 income. To have your financial need re-evaluated by the OSFA a 2020-2021 Free Application for Federal Student Aid (FAFSA) must be completed. The OSFA will reevaluate your financial need if you meet one of the circumstances described below:

- o Your parent or spouse died after January 2020;
- o You or your parents became separated or divorced after January 2020;
- o You, if you are independent, or one of your parents, if you are dependent, became **completely and involuntarily unemployed** for at least 10 consecutive weeks after January 2019; or
- o You or your parent(s) have lost benefits from child support or social security as a result of you reaching the age of majority.

If your special circumstance does not meet any of the above conditions, OSFA **will not** make adjustments to your financial need.

NOTE: Students demonstrating the above circumstances after January 2019 are encouraged to appeal. Adjustments will not be made due to high medical bills, bankruptcy, consumer debt or unusual expenses. Contact the financial aid office at your college for consideration due to these reasons.

Procedures:

- o You must submit a letter outlining the reasons for your appeal.
- o You must complete the attached appeal form and return it with the appropriate documentation. Each item on the form describes the documents you must submit.
- o Appeals without documentation **will not** be reviewed.
- o You are required to provide your projected 2020 income. Please include all income received to date, as well as the income your family expects to receive during the remainder of 2020. Include taxable and non-taxable income.
- o In the event that you if independent, your spouse, or if dependent your parent did not file taxes, you will need to submit a Non-Tax Filer Statement from the IRS or a notarized letter of your non-tax filing status for the 2018 & 2019 tax filling year.
- o You are required to provide a copy of your, if you are independent 2018 and 2019 Federal IRS Tax Transcript and W2 forms (if dependent your parent(s) 2018 and 2019 Federal IRS Tax Transcript and W2 forms. ***Please note that if you utilized the IRS Data Retrieval tool when submitting your 2020-2021 Free Application for Federal Student Aid (FAFSA), you are not required to submit a copy of your 2018 Federal IRS tax transcript for appeal purposes. However, under this circumstance you are still required to submit you or your parents/spouse 2018 W-2(s) as applicable.***
- o Your appeal will be reviewed and you will be notified of the result in writing within 45 days of submitting the appeal form. Incomplete appeals will delay final decisions.

Deadline: The 2020-2021 Special Financial Circumstances Appeal form and ALL required documentation must be submitted to the Office of Student Financial Assistance no later than July 15, 2020. Appeal information submitted after this date will not be reviewed. You may send the completed form via mail or email to:

Maryland Higher Education Commission
Office of Student Financial Assistance
6 N. Liberty Street, Ground Suite
Baltimore, MD 21201
Email: appeal.mhec@maryland.gov

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Appeal Form
Academic Year 2020-2021
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Instructions:

Identify below the situation for which you are requesting a review of your financial need. Appeals submitted without all required documentation will not be reviewed. Attach required documentation to this form and return it to the above address to the attention of Special Financial Circumstances Appeal.

A. Student Information: (Please print)

1. MHEC ID Number: _____ E-mail address: _____
2. Last name: _____ First name: _____ MI: _____
3. Permanent mailing address: _____
City: _____ State: _____ Zip code: _____
4. Home phone: (____) _____ Work phone: (____) _____

B. Reason for Appeal:

1. Death of ____ parent ____ spouse on or after January 1, 2020.

Required Documentation: A letter outlining the full reasons for appeal; A copy of the death certificate; Please provide your and your parent's **2018 and 2019** Federal IRS Tax Return Transcript and W-2 forms.

Note: Your financial need will be recalculated using only the income of the surviving parent. In the case where a spouse is deceased, only the student's financial information will be used.

2. Separation or divorce of ____ parent ____ student on or after January 1, 2020.

Required Documentation: A letter outlining the full reasons for appeal; A copy of the separation agreement, divorce decree or other official evidence to prove the change in marital status has occurred; Please provide your and your parent's **2018 and 2019** Federal IRS Tax Return Transcript and W-2 forms.

Your financial need will be recalculated using a prorated income.

3. Complete **involuntary** unemployment that begin on or after January 1, 2019 and continues for 10 consecutive weeks for:

Check appropriate person(s): ____ independent student ____ spouse ____ mother ____ father

Required Documentation: A letter outlining the full reasons for appeal; Written notice of involuntary job termination or layoff from former employer (loss of income from temporary positions, self-employment, or commissions may not be considered); If applicable copies of severance pay, and or/any benefits, which will continue after dismissal. Copies of unemployment benefits or proof of denial of benefits; Copies of your last pay stub(s) from previous and/or current employers; Please provide your and your parent's (or spouse for independent students) **2018 and 2019** Federal IRS Tax Return Transcript and W-2 forms.

Your financial need will be recalculated using a prorated income.

4. Loss of child support or social security benefits as a result of **you** reaching the age of majority.

Required Documentation: A letter outlining the full reasons for appeal; You must provide documentation of the loss of child support (i.e. a court order or divorce decree); or the loss of social security benefits. Please provide your and your parent's **2018 and 2019** Federal IRS Tax Return Transcript and W-2 Forms, if any. Your financial need will be recalculated using a prorated income.

(Over, please)

C. Income Information

If applicable, please provide **documentation** of your expected 2020 income. (Copies of pay stubs, unemployment benefits, and other untaxed income, {excluding Social Security benefits, and TANF})

Current and Projected Earnings for 2020

Taxable Income	Income Earned from Jan. 1, 2020 through date of appeal	Projected Total Income for Year 2020
Father's wages, salaries, tips:	_____	_____

Mother's wages, salaries, tips:	_____	_____

Student's wages, salaries, tips:	_____	_____

Spouse's wages, salaries, tips:	_____	_____

Unemployment income:	_____	_____
Other taxable income:	_____	_____

Untaxed income	Income Earned from Jan. 1, 2020 through date of appeal	Projected Total Income for Year 2020
Child support (monthly amount):	_____	_____
Other untaxed income:	_____	_____
(Include military BAQ, BAS, clothing, etc.)		

Comments: _____

D. Certification: I (We) certify that the information contained on this form is true and correct to the best of my knowledge. If requested, I agree to provide further documentation to substantiate this request for special circumstances. I understand all special circumstances are reviewed on a case-by-case basis and this written request does not guarantee approval and may not ultimately result in actual increases of State financial aid. I also understand that if the appeal is granted, the eligibility for the Educational Assistance Grant or the Guaranteed Access Grant will be recalculated and adjusted if funds are available. If funds are unavailable, I will then be placed on a waiting list until funds become available in the academic year. I also understand that all required documents must be submitted prior to reviewing my request for special circumstances. Persons providing information must sign this below

_____ Father's signature	_____ Date	_____ Student's signature	_____ Date
_____ Mother's signature	_____ Date	_____ Spouse's signature	_____ Date