

Southwest community college

2011-12 Special Consideration Form

Student Name _____

Student SCC ID #/SSN _____

Phone Number _____

Email: _____

FINANCIAL AID APPEAL PROCESS:

Financial aid awards are generally based on the parent's and/or student's income for the prior year. Federal law defines a parent/student's ability to contribute towards a college education by calculating the Expected Family Contribution (EFC), as determined by completing the Free Application for Federal Student Aid (FAFSA). Due to certain financial circumstances a parent/student may not be able to contribute as much as the FAFSA initially determined. Federal law does provide some flexibility to allow a Financial Aid Officer to re-evaluate a parent/student's financial situation and use "professional judgment" in making adjustments that adequately reflect ability to support the educational expense. If a professional judgment is allowed the financial aid officer will recalculate your EFC.

The college cannot make across-the-board professional judgments for entire groups of people with similar circumstances (such as all employees laid off by a particular employer). The professional judgment must be exercised on a case-by-case basis – only after all documentation is submitted to the Financial Aid Office. **If it is determined that a recalculation of the EFC is appropriate, it is valid for the current academic year only. Any adjustment made to the EFC should not be construed as a commitment for adjustments in future academic years.**

► Examples of circumstances that MAY warrant a Professional Judgment:

- Loss of job/Reduction in income - for dependent students, significant changes in parental income from 2011 to 2012
- Loss of job/Reduction in income - for independent students, significant changes in student's and/or spouse's income from 2011 to 2012
- Loss of benefits, child support, retirement, VA or Social Security benefits
- Un-reimbursed medical/dental expenses
- Death of family member
- Divorce/Separation

► Examples of circumstances NOT warranted:

- Medical costs paid for by insurance, other parties, flex plans, co-payments or any other tax deductible expenses
- Routine dental, physical or eye care
- Personal expenses such as monthly bills, purchase of new vehicle/home or other lifestyle choices
- Vehicle or home maintenance
- Travel expenses for vacations or entertainment

CIRCUMSTANCES AND DOCUMENTATION:

Check below the section(s) that best fits your special circumstance and **be sure to submit the type(s) of documentation** that can be used to substantiate your request (**submit all that apply to your case**):

► Loss of Job or Income Reduction

- Projection of family income for the entire year of 2011 – include all family members (i.e. both parents and student)
- Letter of termination from employer – must indicate the termination date
- Last pay stub from lost employment – identify whether it is weekly, bi-weekly or monthly amount on pay stub
- Unemployment benefits – including amount of benefits, length of time you are eligible for benefits, start date and end date
- A typed statement (must be signed and dated) explaining your circumstances and why your Expected Contribution (EFC) should be recalculated
- If the student is **dependent**, a **signed copy** of parent(s) & student's 2010 federal tax return including all schedules and W-2's.
- If the student is **independent and/or married**, a **signed copy** of the students (and spouse's) 2010 federal tax return including all schedules and W-2's.

► Loss of Benefits (Disability, retirement, worker’s compensation, social security benefits), alimony and / or child support

- Notice of termination of disability, social security, workers compensation – must include the date of termination and the dollar amount terminated
- Notice of termination of child support/alimony – must include the date of termination and the dollar amount terminated
- Copy of divorce decree with section highlighted showing orders of child support (when it begins, dollar amount)
- Must provide amount of social security benefits expected for 2011 for all members of the household who will received benefits for 2011
- A typed statement (must be signed and dated) explaining your circumstances and why your Expected Contribution (EFC) should be recalculated
- If the student is **dependent**, a **signed copy** of parent(s) & student’s 2010 federal tax return including all schedules and W-2’s.
- If the student is **independent and/or married**, a **signed copy** of the students (and spouse’s) 2010 federal tax return including all schedules and W-2’s.
- Projection of family income for 2011 – include all family members (i.e. both parents and student)

► Unusually high/un-reimbursed Medical/Dental/Prescription Expenses – not covered by insurance

- Copy of all medical/dental expenses not covered by insurance – include itemized sheet with documents
- Copies of prescription bills not covered by insurance – include itemized sheet with documents
- A typed statement (must be signed and dated) explaining your circumstances and why your Expected Contribution (EFC) should be recalculated
- If the student is **dependent**, a **signed copy** of parent(s) & student’s 2010 federal tax return including all schedules and W-2’s, especially Schedule A
- If the student is **independent and/or married**, a **signed copy** of the students (and spouse’s) 2010 federal tax return including all schedules and W-2’s.
- Projection of family income for 2011 – include all family members (i.e. both parents and student)

► Other Circumstances (those that severely impact income and cause extreme hardship)

- Separation or divorce of parents/student since applying for Federal financial aid – must provide date & documentation of separation or divorce – must indicate which parent will be providing more than 50% of your support (if dependent)
- Death of a parent or spouse since applying for Federal financial aid – must provide date of death & copy of Death Certificate
- A typed statement (must be signed and dated) explaining your circumstances and why your Expected Contribution (EFC) should be recalculated
- If the student is **dependent**, a **signed copy** of parent(s) & student’s 2010 federal tax return including all schedules and W-2’s.
- If the student is **independent and/or married**, a **signed copy** of the students (and spouse’s) 2010 federal tax return including all schedules and W-2’s.
- Projection of family income for 2011 – include all family members (i.e. both parents and student)

NOTE: IN ORDER FOR THE FINANCIAL AID OFFICE TO REVIEW YOUR SPECIAL CONSIDERATION YOU **MUST RETURN ALL DOCUMENTATION FOR THIS APPEAL AT THE SAME TIME.** (DO NOT SEND IN DOCUMENTATION PIECE BY PIECE).

Without proper documentation and the required information, this request can delay your financial aid award from being provided to you in a reasonable timeframe.

Your signature and your parent’s or spouse’s signature below will attest to the accuracy of information provided.

Certification: the information on this form and provided documentation is true and complete to the best of my knowledge. I agree to furnish additional information if asked. I understand that purposely giving false or misleading information is subject to a fine of up to \$10,000, federal imprisonment of up to five years, or both.

Student’s Signature

Date: _____

Parent/Step Parent or Spouse Signature

Date: _____