Special Circumstances Information Sheet
For tax year 2017
Academic Year 2018-2019
What is needed and do I qualify?

The first step in a Special Circumstance Review is to write a detailed letter explaining your family situation and/or how expenses have changed that meets one of the specified situations below. You must provide proper documentation of your appeal (see below for specifics). This appeal information will be used to evaluate changes in your family situation and to determine if adjustments can be made in order to present a more realistic picture of the family’s ability to contribute to the cost of education. Each request will be considered on a case-by-case basis. Adjustments of financial aid awards are subject to the availability of funds. You may be asked for further documentation. Please allow at least eight weeks after the last of your documents has been received, for your request to be reviewed and processed.

Listed below are circumstances that may be considered.

<table>
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<tr>
<th>Situation</th>
<th>Do I qualify for reconsideration?</th>
<th>Documentation Required</th>
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| Books/Supplies exceed amount allowed | I paid more than allowed for books/supplies. | • Signed letter from student explaining situation  
  • Copies of paid receipts |
| Day Care (Independent Students Only) | I have child care expenses | • Signed letter from student explaining situation  
  • Paid invoice from provider or letter on letterhead from provider. |
| Death of Parent               | My parent has died since I filed my FAFSA or between January 1, 2017 and December 31, 2017 | • Signed letter from student and/or surviving parent explaining situation  
  • Copy of Death Certificate  
  • Submit a signed copy of parent’s 2016 federal tax transcript from the IRS  
  • Copy of parent’s 2016 W-2s  
  • Documentation - if surviving parent receives or is expecting to receive any type of survivor’s benefits (kinds and amounts) |
| Dependency Appeal             |                                  | • See your financial aid counselor for more specific details |
| Medical Expenses              | Excessive medical expenses.      | • Signed letter from student and or parents explaining family situation  
  • Copies of cancelled checks/credit card payments reflecting payments toward bills that are not covered by insurance during the 2017 tax year |
| Number in College             | One or both my parents are attending college for at least half-time working toward a degree | • Signed letter from student and/or parents explaining why parent(s) is enrolled in college and who is paying for educational costs, what degree is being pursued  
  • Enrollment verification from parent’s college/university for 2018-2019 academic year  
  • Statement from parent’s college showing charges |
| Retirement | Parent Retires | • Projected Year Income Form for 2017  
• Update student’s 2018-2019 FAFSA using the IRS Data Retrieval System OR submit a signed copy of parent’s 2016 federal tax transcript from the IRS  
• Copy of parent’s 2016 W-2s  
• Letter of Separation (that occurred during 2017) from employer  
• Copy of final pay stub  
• Copy of any benefits being received as part of retirement-severance pay |
| Separated/Divorced Parent | My parents have become separated or divorced since I filed my FAFSA or between January 1, 2017 and December 31, 2017 | • Signed letter from student with situation  
• Copy of divorce decree or letter from a lawyer indicating the date you/your parents filed for divorce or that you separated with the financial terms of divorce or separation  
• Projected Year Income Form for 2017  
• Update student’s 2018-2019 FAFSA using the IRS Data Retrieval System OR submit a signed copy of parent’s 2016 federal tax transcript from the IRS  
• Copy of parent’s 2016 W-2s  
• If filed, please submit a copy of the 2017 federal tax return. |
| Significant Reduction in Earned Income or Benefits (Social Security, Child Support, Alimony, other) | My parents or I have lost our job.  
(others)  
--loss of child support  
--loss of social security | • Projected Year Income Form for 2017  
• Update student’s 2018-2019 FAFSA using the IRS Data Retrieval System OR submit a signed copy of parent’s 2016 federal tax transcript from the IRS  
• Copy of parent’s 2016 W-2s  
• If filed, please submit copy of 2017 1040 tax return and 2017 W-2s  
• Signed letter from student and/or parent explaining family situation  
• Documentation from the employer, copy of unemployment benefits, copy of last pay-stub from both previous employer and current job (if applicable)  
• Loss of benefits documented from source (i.e. Social Security Administration, Veterans Administration) |
| Student Cost of Attendance (COA) | I need more to live on than amount allotted for room/board, personal, and travel | • Signed letter from student explaining why COA not adequate and describe living arrangements  
• Provide proof of expenses such as copy of lease, copy of bills etc.  
• Budget Increase Request Form |
| Travel Expenses | My actual cost is more than allowed for travel | • Signed letter from student explaining commuting situation  
• Document mileage and number of trips per week |

If you have any more questions regarding this process, please contact a Financial Aid Counselor at (540) 831-5138 or finaid@radford.edu.