



Office of Financial Aid and Scholarships
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2008-2009 Special Condition Appeal

Student Name

OSU ID #

The Office of Financial Aid and Scholarships has the authority to make adjustments to an individual's federal student aid application based on special conditions within the household. Anyone requesting an appeal must also go through the verification process. It is important to know that not all changes in circumstances will result in an adjustment to the student's aid eligibility. When reviewing an appeal the Office of Financial Aid and Scholarships takes into account the availability of funds and the nature of the change in circumstances. Before an appeal can be considered, the 2008-09 FAFSA must have already been filed.

Please submit ALL the following information and documentation:

- A written statement describing your financial circumstances and what caused a decrease in your resources (use a separate sheet of paper).
- A signed copy of the 2007 Federal income tax returns for the individual(s) whose income is being reviewed. If the parent income situation is changing, only the parent documents are required.
- This form completed, signed and reporting your anticipated 2008 Calendar year income from January 2008 to December 2008, along with other documentation as requested for your situation. (Note: It may be required that parent and/or student provide copies of the 2008 Federal tax return depending on the date of this request and when reasonable projections cannot be made.)

Include your student's name and OSU ID on all documentation. Please follow all instructions completely as missing information will delay the review of your appeal. Your student will be notified through their OSU email if any changes to their financial aid award occurred.

Return completed forms to the OSU Office of Financial Aid and Scholarships.

BASIS FOR APPEAL – Indicate the Individual with the loss of the resource as noted.

Mother Student

Father Spouse

A. **LOSS OR REDUCTION OF INCOME OR BENEFITS:**
Was employed in 2007, but experienced a loss of job or reduction of income in the 2008 calendar year.
Date change occurred: _____

(Adjustments for loss of overtime or commission income are not considered)

Received unemployment compensation or some untaxed income benefit in 2007 and have lost that income or benefit in the 2008 calendar year.

Documentation Required: 1) Termination letter or loss of benefit notification, if applicable. 2) Copy of 2007 Federal Tax forms, 3) Current pay stubs showing decreased income, if applicable, 4) Written statement describing circumstances

B. **ONE TIME BENEFIT**

Received a ONE-TIME income or benefit in 2007 and will not receive that Income or benefit in the 2008 calendar year.

Documentation Required: Letter explaining source of funds received in 2007 and the reason you will not receive that same income or benefit in the 2008 calendar year.

C. **CHANGE IN MARITAL STATUS** since filing the FAFSA
Individual has become separated, divorced or widowed in 2008.
Date of separation divorce widowed:

_____/_____
Month Year

Documentation Required: 1) Divorce or legal separation papers indicating the date of marital change, 2) Written statement of when separation occurred, 3) Copy of death certificate, or obituary.

D. **MAJOR MEDICAL/DENTAL EXPENSES**
Outstanding major medical/dental expenses in the 2008 calendar year that are not covered by insurance OR insurance premiums paid.

Documentation Required: 1) Copy of your 2007 Federal Tax return-Schedule A from tax forms if applicable, 2) Attach bills and an itemized list with a total of ALL expenses not covered by insurance for 2008. Expenses not itemized or clearly defined will not be reviewed.

ESTIMATED 2008 INCOME

Estimate your income for the 12 month period of 01/01/2008 – 12/31/2008 for each category below. Do not leave blanks. Report zero (\$0) where applicable. Incomplete information will delay processing. Only report the income of the person indicating the change of income.

ANTICIPATED INCOME FOR 2008	PARENT(S)	STUDENT/SPOUSE
○ Gross wages, salaries, tips, before taxes: Father	\$ _____	\$ _____ Student
Mother	\$ _____	\$ _____ Spouse
○ Severance Pay:	\$ _____	\$ _____
○ Interest and dividend income:	\$ _____	\$ _____
○ Alimony Received:	\$ _____	\$ _____
○ Business and/or Farm Income:	\$ _____	\$ _____
○ Partnership and/or S-Corporation Income:	\$ _____	\$ _____
○ Capital Gains:	\$ _____	\$ _____
○ Pensions and Annuities:	\$ _____	\$ _____
○ Rents & Royalties:	\$ _____	\$ _____
○ Unemployment Compensation:	\$ _____	\$ _____
○ Other Taxable Income:	\$ _____	\$ _____
○ Social Security Benefits for ALL family members:	\$ _____	\$ _____
○ Worker's Compensation:	\$ _____	\$ _____
○ Retirement and/or Disability Benefits:	\$ _____	\$ _____
○ Welfare Benefits, including TANF:	\$ _____	\$ _____
○ Untaxed portion of pensions and/or annuities:	\$ _____	\$ _____
○ Living and housing allowance for clergy/military:	\$ _____	\$ _____
○ Child support received for ALL children:	\$ _____	\$ _____
○ Veteran's non-educational benefits:	\$ _____	\$ _____
○ Deductible IRA/Keogh payments:	\$ _____	\$ _____
○ Other Untaxed income: Source: _____	\$ _____	\$ _____
○ Cash received, or money paid you your behalf:	\$ _____	\$ _____
Source/recipient: _____		
TOTAL 2008 INCOME:	_____	_____

CERTIFICATION STATEMENT

I certify that all information noted above for my federal student aid eligibility is true and complete to the best of my knowledge. If my financial situation/circumstance changes from what I have reported on this appeal, I agree to notify the Office of Financial Aid and Scholarships. I understand that this appeal is based on projections and that it may be required that the student and/or parent provide copies of their 2008 Federal tax return at a later date.

Student Signature
(required for STUDENT change only)

Date

Parent/Step-parent Signature
(required for PARENT change only)

Date