

University of Delaware  
2011-2012 Hardship Appeal Form

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Student Name: \_\_\_\_\_

Date: \_\_\_\_\_

Student ID #: \_\_\_\_\_

Phone Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Student Email Address: \_\_\_\_\_

Consistent with federal regulations, the Office of Student Financial Services reviews special circumstances where current financial situations of students and/or their families may not be accurately reflected in a student's Free Application for Federal Student Aid (FAFSA). The University is committed to assisting students and families throughout the financial aid process.

Traditionally, the University only reviews special circumstance appeals for the situations detailed on the following page, however, please review the guidance below:

- Appeals should be submitted for major or unforeseen changes in circumstances that affect your ability to contribute to college costs. Examples include loss of income, unemployment, high medical expenses (already paid), divorce, etc.
- Appeals can be submitted in situations where important financial information was not included in your original application materials or may not have been considered when your application was reviewed.
- **Appeals based on discretionary expenditures such as car payments, wedding expenses, vacations, or high credit card debts are not considered.**

**Check List:**

- I have filed a Free Application for Federal Student Aid (FAFSA)<sup>1</sup> (An appeal cannot be reviewed until a FAFSA is filed)
- I have provided a signed copy of parents'/student's **2010** year federal tax form (including W-2 forms).
- Attachment A:** I have checked the appropriate circumstance on the following page and submitted the relevant documentation.
- Attachment B:** I have completed the personal statement describing my special circumstance appeal.
- Attachment C (1-4):** I have completed the income expense worksheet

I certify that all the information furnished on this form, including personal statements and documentation, is complete and correct. I understand that by submitting this form, I acknowledge I am not guaranteed to receive additional financial aid.

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Student's Signature      Date                      Parent's Signature (if applicable)                      Date

<sup>1</sup> To file, please visit: [www.fafsa.ed.gov](http://www.fafsa.ed.gov)

## Attachment A

- Please check the special circumstance that most accurately reflects your situation.
- You must submit at minimum **all** of the documents listed under your selected option for your appeal to be reviewed. Please, feel free to send any additional financial documents that further support your appeal.

**Unemployment:** Please submit the 4 documents specified below

1. Letter from student's/parent's employer or termination notice that confirms last date of employment.
2. Unemployment documentation from state/federal agency indicating amount of unemployment benefits. If ineligible, please provide documentation.
3. Statement detailing severance and/or vacation pay from previous employer.
4. Copy of two most recent pay stubs.

**Loss of income or salary reduction—this should amount to a loss of income for a period of at least 8-10 weeks:** Please submit 2 documents specified below.

1. Copy of start letter and salary quote from new employer.
2. Copy of two most recent pay stubs for parent(s)/ student/ spouse with YTD information.

**Loss of child support:** Please submit the document specified below.

1. Statement regarding alimony/child support from attorney or court.

**Separation/Divorce:** Please submit the documents specified below.

1. Copy of separation/divorce agreement, letter from 3<sup>rd</sup> party which confirms date of divorce or other official document.

**Death of Parent/Spouse** Please submit the two documents specified below.

1. Copy of death certificate or newspaper obituary.
2. Documentation of life insurance and/or social security benefits.

**Unusually high medical expenses—Your family incurred significant medical/dental expenses that were PAID in 2010 and not reimbursed by insurance (out of pocket expenses):**

Please submit the two documents specified below.

1. Provide brief description of out of pocket medical expenses on following page.
2. Schedule A from tax return – copy of medical receipts.

**Retirement:** Please submit the two documents specified below.

1. Documentation of pension plan and retirement benefits.
2. Letter from Social Security Administration describing change in benefits.

## Attachment B

Please provide a brief personal statement describing your financial situation below:

## Attachment C

<b>1. Family Information</b>	
<p>List the people in your household that will be provided with more than half their support from July 1, 2011 through June 30, 2012:</p> <p><b>If DEPENDENT Student*, include:</b></p> <p>* Yourself and your parents you live with (include stepparent)</p> <p>* Your parents' dependent children, if your parents provide more than half of their support or if the children would be required to provide parent information when applying for Federal aid.</p> <p><b>If INDEPENDENT Student**, Include:</b></p> <p>** Yourself and your spouse</p> <p>** Your dependent children, if <u>you</u> provide more than half of their support</p>	<p><b>Include other people as part of your household only if:</b> They now live with you (if independent) or your parents (if dependent) <b>AND</b> you or your parents provide more than half of their support from July 1, 2011 through June 30, 2012.</p> <p><b>** A STUDENT IS CONSIDERED INDEPENDENT IF ANY OF THE FOLLOWING ARE TRUE:</b></p> <ol style="list-style-type: none"> <li>1) born before January 1, 1988</li> <li>2) will be working on a master's or doctorate program at the <u>beginning</u> of the 2011 – 2012 school year.</li> <li>3) married</li> <li>4) have children or <u>legal</u> dependent(s) other than a spouse</li> <li>5) emancipated minor</li> <li>6) legal guardianship</li> <li>7) at risk of homelessness</li> <li>8) an orphan or ward of the court or in foster care at any time since you turned age 13</li> <li>9) veteran of the U. S. Armed Forces</li> <li>10) on active duty for other than training purposes</li> <li>11) unaccompanied youth determined by your high school or HUD on or after July 1, 2011</li> </ol>

Name of student and family members (as outlined above)	Relationship to the student	Date of Birth mm/dd/yyyy	College - (if enrolled at least half-time for 2011-2012 in an undergraduate program). <b>Note:</b> Do <u>not</u> include parents in college.	Expected Graduation Date
	SELF		UNIVERSITY OF DELAWARE	

If you need additional space for family members, attach a separate sheet.

2. Student's and Spouse's (if married) Income Information	
<p>1. Check <b>one</b> of the appropriate boxes below:</p> <p><input type="checkbox"/> I / We have enclosed the <b>SIGNED</b> Tax Forms***</p> <p><input type="checkbox"/> I, the student, certify that <b>I did not, will not and/or am not required to file</b> a 2010 U.S. Income Tax Return. Please note if you are a dependent student you may just check here, but if you are an independent student you must also contact the IRS to obtain a 2010 Non-Tax Filer Status document.</p> <p>2. If you did not file and are not required to file a 2010 U.S. Income Tax Return, list below your employer(s) and any income received in 2010. (Attach the W2 form(s) or other earnings statement if available).</p>	
Sources:	2010 Amount:

3. Parent (s') Tax Forms and Income Information	
<p>1. Check <b>one</b> of the appropriate boxes below:</p> <p><input type="checkbox"/> I / We have enclosed the <b>SIGNED</b> Federal Tax Forms***</p> <p><input type="checkbox"/> I, the parent(s), certify that <b>I did not, will not and/or am not required to file</b> a 2010 U.S. Income Tax Return. Please note you must contact the IRS to obtain a 2010 Non-Tax Filer Status document.</p> <p>2. If you did not file and are not required to file a 2010 U.S. Income Tax Return, list below your employer(s) and any income received in 2010. (Attach the W2 form(s) or other earnings statement if available)</p>	
Sources:	2010 Amount:

\*\*\*Federal Tax Forms include the 2010 U.S. IRS Forms 1040, 1040A, 1040EZ, 1040 Telefile, Puerto Rico Tax Return, or Foreign Tax Return including all pages and schedules. Tax returns printed in another language must be translated to English before submitting for processing.

4. Additional Financials (from FAFSA Question 43 and/or 91) and Untaxed Income (from FAFSA Questions 44 and/or 92)		
<b>Do not leave any spaces blank below. If Zero, please write "0"</b> Please note: Forms submitted without being properly completed will be returned, slowing the process for completion.		
Additional Financials		
Student/Spouse		Parent(s)
	Child support PAID because of divorce or separation. Do NOT include child support for children listed in Part B.	
	Taxable earnings from Federal Work Study or other need-based work programs earned in 2010.	
	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	
Untaxed Income		
	Payment to tax-deferred pension and savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, & S.	
	Child support received for <b>all</b> children. Do not include foster care or adoption payments.	
	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value benefits).	
	Veterans non-educational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
	Any other untaxed income not reported, such as workers' compensation, disability, etc. DON'T include student aid, earned income credit, additional tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	

### Important information:

- The Office of Student Financial Services cannot review appeals until all required documentation has been received. We strongly encourage families to email scanned documents to [finaid-appeals@udel.edu](mailto:finaid-appeals@udel.edu).
- In situations where a student is selected for verification by the federal government, appeals cannot be completed until the verification review is complete.
- The University can only review appeals where a current FAFSA is on record. If you have not completed a FAFSA, please visit: <http://www.fafsa.ed.gov>.
- **You are responsible for payment of your university charges while this appeal is being reviewed.**

### Submittal Instructions:

In order to receive the timeliest appeal evaluation, the Office of Student Financial Services strongly encourages families to scan or fax the information. Information can be mailed to the address below:

Attn: Processing Division  
 Office of Student Financial Services  
 Newark, DE 19716  
 Ph: (302) 831-2126  
 Fax: (302)831-3041  
 Email Scanned Copies to: [finaid-appeals@udel.edu](mailto:finaid-appeals@udel.edu)