

FAFSA Data Appeal Form Instructions

We understand that the FAFSA does not take into account all situations and some students have special circumstances that impact their ability to pay for college. In order to review these situations, we require certain documentation. Prior to submitting an appeal, please read the following information.

GRADUATE STUDENTS – this type of appeal is not beneficial to you as your financial aid options through our office are limited to student loans. Please contact our office to discuss other options.

- **Our office will verify all 2019-2020 FAFSA data prior to considering any appeal.**
- **During the appeal review, if any of the provided documentation conflicts with any information previously reported on the FAFSA, then our office is required to resolve the conflicting information regardless if the appeal is approved or denied. This could cause an increase or decrease to your current financial aid.** Any increases in aid are subject to fund availability.
- We may request more information after reviewing the required items listed on this form.
- The average processing time is **3 weeks**.
- **Please ensure that all required documentation is provided upon initial submission.**
- Approval of an appeal **does not guarantee** additional aid.
- Appeals cannot be used simply to request more financial aid.

Reasons for Appeal:

Examples of appeal reasons include, but are not limited to the following:

- Unemployment of more than 4 weeks following involuntary job loss.
- Death of a student's parent or spouse.
- The family has incurred extraordinary medical/dental expenses.
- The student's parent is attending college at least half-time in a degree-seeking program
- The student or the student's parents have separated or divorced or retired from work.
- The student or parent(s) no longer receives recurring income such as child support, or other sources of income.
- The parent or student has received payment(s) of non-recurring income (i.e. severance package, bonus, etc...) which were unavailable for educational expenses.

Deadlines:

- Appeals must be submitted by **November 8, 2019** for students attending fall semester only.
- Appeals must be submitted by **May 1, 2020** for students attending fall/spring or spring semester only.

Please include the student's Virginia Tech ID (begins with 90xxxxxx) on the top of each page.

Please review the attached FAFSA Data Appeal Form which lists the additional items for each type of appeal. **If you choose to pursue the appeal, please submit all required documents upon initial submission.**

(Please Note: Email is not always a secure method of communication and may inadvertently expose your information if misdirected. Virginia Tech suggests using fax, U.S. Postal Service or personal delivery as a more secure method of delivery. If you choose to submit information through email, Virginia Tech will not be responsible for any exposure of data.)

2019-2020 FAFSA Data Appeal Form

Student ID #: _____
Email _____
 Grad Date _____
Month/Year

Student's
 Full Legal Name: _____,
 (Please print clearly) **Last** **First** **Middle**

Your appeal will be reviewed by the Office of University Scholarships and Financial Aid and you will be notified of the outcome of the appeal.

Deadlines:

- Appeals must be submitted by **November 8, 2019** for students attending fall semester only.
- Appeals must be submitted by **May 1, 2020** for students attending fall/spring or spring semester only.

Required for all appeals:

- Written statement of **student or parent** describing the appeal circumstances. Use box provided on this form or attach a separate document.
- FAFSA Data Appeal Form, completed and signed by both student and parent, if student is dependent
- Verification Worksheet
 - Dependent students
 - https://finaid.vt.edu/content/dam/finaid_vt_edu/forms/1920/1920_V1DEP.pdf
 - Independent students
 - https://finaid.vt.edu/content/dam/finaid_vt_edu/forms/1920/1920_V1INDP.pdf
- Required tax return documentation
 - If the Data Retrieval Tool was used on the 1920 FAFSA, no tax documents are required.
 - If the Data Retrieval Tool was not used, provide a copy of your 2017 tax return transcript.
- Additional documentation listed below. Any forms or worksheets requested below can be found at this link:
<http://finaid.vt.edu/forms.html>

	REASON FOR APPEAL	REQUIRED DOCUMENTATION
<input type="checkbox"/> 1.	Student's parent or spouse has died since completion of FAFSA.	<input type="checkbox"/> Copy of the parent's or spouse's death certificate. <input type="checkbox"/> Complete Marital Status/Tax Filing Worksheet (for parents or student/spouse as applicable).
<input type="checkbox"/> 2.	The student's parent(s) is attending college at least half-time in a degree-seeking program.	<input type="checkbox"/> Documentation of parent's enrollment including credits for the 2019-2020 academic year. <input type="checkbox"/> Documentation that parent is enrolled in a degree-seeking program. <input type="checkbox"/> Documentation of any cost reimbursement (by employer for example).
<input type="checkbox"/> 3.	The student or parent(s) no longer receives recurring income such as child support, taxable social security, alimony, or other sources of income.	<input type="checkbox"/> If benefits are terminated - documentation of the monthly benefit amount received and date of benefit termination. <input type="checkbox"/> If benefits are reduced – documentation of both original benefit amount, date of reduction, and reduced benefit amount.
<input type="checkbox"/> 4.	Parent or student has received payment(s) of non-recurring income that is not available for educational expenses.	<input type="checkbox"/> Documentation of fund amount and the source of the funding. <input type="checkbox"/> Documentation of how funds were spent or obligated. Examples may include severance package, one-time bonus, IRA early withdrawal, etc.

CHECK	REASON FOR APPEAL	REQUIRED DOCUMENTATION
<input type="checkbox"/> 5.	<p>Extraordinary family medical/dental expenses not covered or reimbursed by insurance.</p> <p>Paid expenses can only be appealed for one calendar year, either 2017 or 2018.</p>	<p><input type="checkbox"/> For 2017 expenses - submit a 2017 IRS 1040 Schedule A if you itemized medical expenses. If you did not itemize, submit proof of medical expenses paid in 2017*.</p> <p><input type="checkbox"/> For 2018 expenses – submit a 2018 IRS 1040 Schedule A. If that has not yet been filed or if you will not itemize, submit proof of medical expenses paid in 2018*.</p> <p>Insurance Explanation of Benefit (EOB) is <u>not</u> acceptable documentation</p> <p><u>Please do not send cancelled checks or credit card statements</u></p>
<input type="checkbox"/> 6.	<p>The student or the student's parents have separated or divorced.</p>	<p>Dependent Student</p> <p><input type="checkbox"/> Letters from both parents stating the date of separation and identifying the parent with whom the student will reside with for the majority of the year. The parent with whom the student will not reside with for the majority of the year should state how much support (if any) will be given monthly to the custodial parent for all family members.</p> <p><input type="checkbox"/> Copies of a utility bill, etc. from each parent supporting separate physical addresses.</p> <p><input type="checkbox"/> Complete Marital Status/Tax Filing Worksheet for Parent(s)</p> <p>Independent Student</p> <p><input type="checkbox"/> Letters from both student and spouse. The letters should list any dependents and include the amount of support payments (if any) provided to the student or dependents.</p> <p><input type="checkbox"/> Complete Marital Status/Tax Filing Worksheet for Students.</p>
<input type="checkbox"/> 7.	<p>The student or parent(s) income has been significantly reduced.</p> <p>*Please note that the <u>earliest</u> we will consider an appeal due to unemployment will be 4 weeks from the date of termination.</p>	<p>Significant loss of income due to termination or change in employment</p> <p><input type="checkbox"/> Copy of separation notice.</p> <p><input type="checkbox"/> Final pay stub and documentation of severance pay (if applicable).</p> <p><input type="checkbox"/> Documentation of unemployment benefits (if applicable).</p> <p><input type="checkbox"/> Copy of 2018 tax return OR written statement of estimated earnings and non-taxable income for 2019.</p> <p>Significant reduction in income</p> <p><input type="checkbox"/> Copy of last pay stub prior to income reduction.</p> <p><input type="checkbox"/> Copy of most recent pay stub showing reduced earnings.</p> <p><input type="checkbox"/> Copy of 2018 tax return OR written statement of estimated earnings and non-taxable income for 2019.</p> <p>Reduction of income due to Retirement</p> <p><input type="checkbox"/> Copy of separation notice</p> <p><input type="checkbox"/> Final pay stub</p> <p><input type="checkbox"/> Copy of 2018 tax return OR written statement of estimated earnings and non-taxable income for 2019.</p> <p><input type="checkbox"/> Documentation of monthly income sources for all retirement income, including taxable Social Security benefits (if applicable)</p>
<input type="checkbox"/> 8.	<p>Correction to income or asset information reported.</p>	<p><input type="checkbox"/> Detailed description of error and correction.</p> <p><input type="checkbox"/> Documentation of correct amount (for example, if mortgage value and debt of non-primary residence was misreported, a copy of the mortgage statement and most recent assessment of property should be sent).</p>

Asset Information (as of the date you filed the FAFSA)	Parent Amount (whole dollars only)	Student Amount (whole dollars only)
Balance of Cash, Savings, and Checking	\$	\$
Net worth of Investments (<i>Value minus debt = current net worth</i>)	\$	\$
Net worth of Business and/or Farm (<i>Value minus debt = current net worth</i>)	\$	\$

Statement describing the reason for appeal request

- Include student's last name and Virginia Tech ID number on every page of documentation.
- Allow at least **three weeks** after submitting all requested documents for your appeal results.

If I purposely give false or misleading information, I may receive a fine, a prison sentence, or both. By signing this form, I certify that all information is complete and correct.

Student's Signature _____ **Date** _____
 Electronic signatures are not allowed

Parent's Signature _____ **Date** _____
 Dependent students only