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 2020-2021 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. Note: Any professional judgments related to the economic impacts of the COVID-19 pandemic will not be considered until June 2, 2020.
- 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 6, 2020 for students attending fall semester only.
- Appeals must be submitted by April 2, 2021 for students attending fall/spring or spring semester only.

Please include the student’s Virginia Tech ID (begins with 90xxxxxxx) 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.)
2020-2021
FAFSA Data Appeal Form

Student ID #: ___________________________  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 6, 2020 for students attending fall semester only.
• Appeals must be submitted by April 2, 2021 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
  o Dependent students
  o https://finaid.vt.edu/content/dam/finaid_vt_edu/forms/2021/2021_V1DEP.pdf
  o Independent students
  o https://finaid.vt.edu/content/dam/finaid_vt_edu/forms/2021/2021_V1INDP.pdf
☐ Required tax return documentation
  o If the Data Retrieval Tool was used on the 2021 FAFSA, no tax documents are required.
  o If the Data Retrieval Tool was not used, provide a copy of your 2018 federal tax return transcript or a signed copy of your 2018 federal tax return.
☐ Additional documentation listed below. Any forms or worksheets requested below can be found at this link: http://finaid.vt.edu/forms.html

<table>
<thead>
<tr>
<th>REASON FOR APPEAL</th>
<th>REQUIRED DOCUMENTATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Study’s parent or spouse has died since completion of FAFSA.</td>
<td>☐ Copy of the parent’s or spouse’s death certificate. ☐ Complete Marital Status/Tax Filing Worksheet (for parents or student/spouse as applicable).</td>
</tr>
<tr>
<td>2. The student’s parent(s) is attending college at least half-time in a degree-seeking program.</td>
<td>☐ Documentation of parent’s enrollment including credits for the 2020-2021 academic year. ☐ Documentation that parent is enrolled in a degree-seeking program. ☐ Documentation of any cost reimbursement (by employer for example).</td>
</tr>
<tr>
<td>3. The student or parent(s) no longer receives recurring income such as child support, taxable social security, alimony, or other sources of income.</td>
<td>☐ If benefits are terminated – documentation of the monthly benefit amount received and date of benefit termination. ☐ If benefits are reduced – documentation of both original benefit amount, date of reduction, and reduced benefit amount.</td>
</tr>
<tr>
<td>4. Parent or student has received payment(s) of non-recurring income that is not available for educational expenses.</td>
<td>☐ Documentation of fund amount and the source of the funding. ☐ Documentation of how funds were spent or obligated. Examples may include severance package, one-time bonus, IRA early withdrawal, etc.</td>
</tr>
<tr>
<td>CHECK</td>
<td>REASON FOR APPEAL</td>
</tr>
<tr>
<td>-------</td>
<td>-------------------</td>
</tr>
<tr>
<td>5.</td>
<td>Extraordinary family medical/dental expenses not covered or reimbursed by insurance.</td>
</tr>
<tr>
<td>6.</td>
<td>The student or the student’s parents have separated or divorced.</td>
</tr>
<tr>
<td>7.</td>
<td>The student or parent(s) income has been significantly reduced.</td>
</tr>
<tr>
<td>8.</td>
<td>Correction to income or asset information reported.</td>
</tr>
</tbody>
</table>

*Please note that the earliest we will consider an appeal due to unemployment will be 4 weeks from the date of termination.
### Statement describing the reason for appeal request

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.

- 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.

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**Student’s Signature**

__________________________  Date

Electronic signatures are not allowed

**Parent’s Signature**

__________________________  Date

Dependent students only

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**Asset Information (as of the date you filed the FAFSA)**

<table>
<thead>
<tr>
<th>Description</th>
<th>Parent Amount (whole dollars only)</th>
<th>Student Amount (whole dollars only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance of Cash, Savings, and Checking</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Net worth of Investments <em>(Value minus debt = current net worth)</em></td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Net worth of Business and/or Farm <em>(Value minus debt = current net worth)</em></td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>
2020-2021
Statement of Estimated Earnings

VT Student ID ___________________________ Last Name ___________________________ First Name ___________________________

*This is supplemental information for the FAFSA Data Appeal Form

Please complete the following page **only if you or your parent will earn less income in 2020 than was earned in 2018.**

<table>
<thead>
<tr>
<th>Income Sources</th>
<th>Earned Income (Year-to-Date)</th>
<th>Estimated Income (Today to Year-End)</th>
<th>= 2020 Total Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent #1 – Wages (all jobs)</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Parent #2 – Wages (all jobs)</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Student – Wages (all jobs)</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Spouse (if applicable) – Wages (all jobs)</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Income or loss of Business or Farm</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>IRA Distributions</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Unemployment Compensation</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Severance Pay</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other Taxable Income</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

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** ________________

**Parent’s Signature** ___________________________ **Date** ________________

Electronic signatures are not allowed.