

2023-24 Parent Appeal



**UNIVERSITY OF
NORTHWESTERN**
ST. PAUL

FINANCIAL AID OFFICE | 3003 Snelling Avenue North | St. Paul, MN 55113-1598 | 866-853-2455 | 651-631-5212
financialaid@unwsp.edu | unwsp.edu/finaid

The U.S. Department of Education gives the Financial Aid Office the authority to make adjustments to a student's FAFSA when financial circumstances arise that are out of the control of the parent. A current FAFSA application is required in order to be eligible for an appeal. Submit this appeal form with supporting documentation to the Financial Aid Office. We will contact you if further clarification of your appeal or if additional documentation is needed. An incomplete form and incomplete documentation will delay the appeal process.

Once the Financial Aid Office has received your completed appeal form and all of the necessary documentation, we will process your appeal and will notify you of the results within a week. Submission of an appeal does not guarantee a change in financial aid eligibility. Please note that not all situations warrant an appeal. See page 4 for a list of situations that are not appealable.

UNW Student Name #1 _____ ID# _____

UNW Student #2 _____ ID# _____

Parent Name _____ Parent Signature _____

Parent E-mail _____ Parent Phone Number _____

Date _____

PLEASE CHECK THE APPROPRIATE SECTION (S): (Complete the section(s) that apply to you and your family)

PARENT(S) REDUCTION IN INCOME OR REDUCTION IN UNTAXED INCOME

Provide the month and year that your income changed or your spouse's income changed: _____

• **Required Documentation:**

- Provide all current pay stubs for self and spouse and your signed 2021 US Income Tax Return (including all schedules). If completing the appeal after May 2023, provide your signed 2022 US Income Tax Return (including all schedules). If receiving unemployment benefits, provide a copy of benefits statement from the government.
- For loss or reduction of untaxed benefits, provide a copy of the court order or notice of termination of benefits from the appropriate agency (example: child support received).

Are you self employed? (check one) Yes _____ No _____

Is your spouse self-employed? (check one) Yes _____ No _____

If you and/or your spouse is self-employed provide your projected earnings. List only income from self-employment:

Name of Self-Employed Person	2023 Projected Self-Employment Earnings	2024 Projected Self-Employment Earnings

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ONE TIME SPECIAL INCREASE IN INCOME IN 2021 THAT WILL NOT BE REPEATED

If your family received a one-time increase in income in 2021 due to a special circumstance such as receiving an inheritance, taking an early withdrawal on retirement, income from sale of property, we may be able to make an adjustment to your FAFSA for that increase.

Provide the reason for your one-time income increase: _____

• **Required Documentation:**

- Your signed 2021 Tax Return

PARENT'S UNUSUALLY HIGH UNINSURED MEDICAL AND DENTAL EXPENSES

We can only consider out-of-pocket medical expenses that are paid within 2021, 2022, or 2023. **We cannot consider any medical expenses that have not been paid, have been paid by insurance, or have been paid by a Health Savings Account (HSA) or flexible spending account.**

We will consider medical expenses that were paid within one calendar year or within another 12 month period (must between January 1, 2021-December 31, 2023). We will only take one year's worth of medical expenses into consideration.

Check the box to indicate that year that your medical expenses occurred:

2021 2022 2023 Another 12 month period: From _____ to _____

• **Required Documentation:**

- Your 2021 Schedule A **and/or** official proof of payment that medical/dental expenses were paid in 2021/2022/2023. This could be a bill with an attached payment confirmation page printed from online, a letter from a hospital/clinic itemizing what you have paid-out-of-pocket printed on letterhead, or a printed statement of your online hospital/clinic account that shows a payment was made by you out-of-pocket. We will not accept an Explanation of Benefits Statement.

OUT-OF-POCKET TUITION EXPENSES AT PRIVATE ELEMENTARY OR HIGH SCHOOL/HOME SCHOOLING COSTS:

We can consider tuition expenses that are paid within the calendar year of 2021 **or** 2022 **or** 2023 **OR** within the 2021/2022 **or** 2022/2023 school year. We cannot consider expenses paid for children attending college/university. We cannot look at high school education expenses for incoming/current students. We will only consider one calendar year or one academic year.

Check the box to indicate that year that your schooling expenses occurred:

2021 Calendar Year 2022 Calendar Year 2023 Calendar Year

2021/2022 School Year 2022/2023 School Year

(see page 3 for required documentation)

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- **Required Documentation:**

(for out-of-pocket tuition expenses at private elementary or high school/home schooling costs)

- For private school: Provide official proof of payment of schooling costs. This could be a bill from the school that indicates the school year, the amount that was charged and the date it was paid, or it could be a letter from the school printed on letterhead, itemizing the expenses that have been paid out-of-pocket.
- For homeschooling costs: Provide an itemized list of all of your schooling expenses and provide receipts for any expenses over \$100.

SIGNIFICANT FINANCIAL SUPPORT OF AN EXTENDED FAMILY MEMBER (50% OR MORE)

Provide documentation of expenses paid in 2021 or 2022 or 2023 such as a summary of data with copies of receipts, cancelled checks, etc. We will consider expenses that were paid within one calendar year or within another 12 month period (must between January 1, 2021-December 31, 2023). We will only take one year's worth of expenses into consideration.

Check the box to indicate that year that you provided financial support:

2021 2022 2023 Another 12 month period: From _____ to _____

PARENT IN COLLEGE WITH TUITION EXPENSES NOT PAID BY LOANS

We can consider tuition expenses that are paid within the calendar year of 2021 **or** 2022 **or** 2023 **OR** within the 2021/2022 **or** 2022/2023 school year. We will only consider one calendar year or one academic year.

Check the box to indicate that year that your schooling expenses occurred:

2021 Calendar Year 2022 Calendar Year 2023 Calendar Year

2021/2022 School Year 2022/2023 School Year

Is the parent receiving employer reimbursement for the tuition expenses? (check one) Yes No

If Yes, how much is the reimbursement? _____

- **Required Documentation:**

- Provide official class schedule from the school that you or your spouse is attending
- Provide official proof of payment of schooling costs. This could be a bill from the school that indicates the school year, the amount that was charged and the date it was paid, or it could be a letter from the school printed on letterhead, itemizing the expenses that have been paid out-of-pocket.

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UNUSUAL DEBT (NOT CONSUMER DEBT)

- The government considers most debt to be consumer debt, and we are not able to consider consumer debt for an appeal. In limited situations, we can review payments that you are making on debt related to essential significant housing repairs (i.e., new roof, new furnace, repairs needed for health reasons), debt related to a legal situation and/or debt related past medical expenses or past business debt (if self-employed). We can only review actual payments made on debt in 2021, 2022, or 2023, not the total debt amount. We will only review one year’s worth of payments. Provide documentation such as a summary of data with copies of contracts, lien, billing/payment summary.

If you have another unusual financial situation that is not listed on this form. Briefly explain your circumstances. You will be required to provide documentation to support your claim. (Use additional pages if necessary.) _____

According to federal government and UNW policy, there are items that cannot be included on an appeal. These include, but are not limited to:

- Tithing/charitable giving
- Mortgage payments
- Wedding/vacation/mission trip expenses
- All consumer debt
- Standard living expenses (i.e., housing, car, credit card expenses)