2020-2021 Change in Circumstances Appeal

Student Information

Student Name: ____________________________      Campus ID: ____________________

A 2020-2021 FAFSA contains 2018 income information and a point in time snapshot of your household information based on the date that you first submitted the FAFSA. If you or your family experiences a significant change in circumstances, the 2020-2021 FAFSA may no longer be an accurate reflection of your family’s financial or household information.

The purpose of this appeal is to request an update to your FAFSA based on a documented change in circumstances. If the FAFSA update creates a change in financial aid eligibility, the financial aid package will be updated to reflect the change. Approved appeals may not result in an increase in financial aid.

Please include the required documents in your initial document submission. Students can submit this completed form and additional documents using the upload form.

INSTRUCTIONS

☐ Identify the circumstances(s) for which you are requesting an appeal. (see page 2)
☐ Attach a typed, clear, concise, signed and dated, one-page explanation of your change in circumstances.
☐ Attach documentation of your change in circumstances. Examples of what may be needed can be found on the second page. Upon review of your initial appeal, additional documents may be requested.
☐ Attach required documents:
  o 2020-2021 Dependent Verification Form, if you are required to provide parent data on the FAFSA, or 2020-2021 Independent Verification Form, if you are not required to provide parent data on the FAFSA
  o 2018 Tax Return Transcripts, which can be obtained by calling the IRS at 1-800-908-9946 or by visiting the website, www.irs.gov, or signed copy of 1040s, for student and spouse, if independent, or student and parent(s), if dependent.
  o 2018 W-2(s) for student and spouse, if independent, or student and parent(s), if dependent.
☐ Contact your assigned financial aid counselor to schedule a time to discuss your appeal.
☐ Initial appeals must be submitted by April 1, 2021.
☐ Submit Change in Circumstances Appeal using upload link: https://ofas.umbc.edu/eforms/?id=21ProfessionalJudgement

I understand that intentionally providing false statements or misrepresentations will result in cancellation of my request. I understand that, if my appeal is approved, the recalculation of my eligibility does not guarantee receipt of additional aid. I understand that my 2020-2021 FAFSA will be verified and corrected using the documentation that I submit.

__________________________________  _____________  ____________________________________________  _____________
Student’s Signature                  Date                  Parent 1’s Signature                            Date

__________________________________  _____________
Spouse’s Signature                  Date                  Parent 2’s Signature  ______________________

________________________________________  __________________________
Spouse’s E-mail                      Parent’s E-mail

UMBC Office of Financial Aid and Scholarships · 1000 Hilltop Circle · Baltimore, MD 21250
Phone: 410-455-2387 · Fax: 410-455-3322 · Contact Us at financialaid.umbc.edu/contact
2020-2021 Change in Circumstances

If you have questions about what documentation to provide, please contact your assigned financial aid counselor.

Student Name: ____________________________      Campus ID: __________________

1. _________ Reduction of earned income

   Reasons for consideration include: Terminations/Layoff from job, significant reduction of work hours, retirement, or leaving work to return to school full time.

   Suggested Documentation to Include: This list is not exhaustive, please include documentation that supports the stated reason for your appeal and documents your reduction in income.
   - Signed and dated letter from employer on company letterhead detailing the last date of employment
   - The final paystub from your last employer
   - 2019 tax return transcript, 2019 signed 1040, and/or 2019 W-2(s), if your income was reduced in 2019
   - 2020 W-2(s)
   - Documentation of severance/benefits/unemployment compensation
   - Copy of your most recent paystub from current employers (include 3 most recent paystubs, if the pay is variable)
   - Documentation of start date of current employment (if applicable)
   - Documentation of retirement income

2. _________ Recent unique medical expenses, not covered by insurance, which impact the ability to pay for college

   Reasons for consideration include: Medical expenses paid, not just incurred, over a recent 12 month period not covered by health/dental insurance.

   Documentation to include: Proof of payment (receipts/cancelled checks) made by student and spouse, if married, or student and parent(s), if dependent. Invoices are not sufficient documentation – please include proof that the expenses were paid.

3. _________ Loss of untaxed income

   Reasons for consideration include: Loss of child support, disability benefits, or other untaxed income.

   Documentation to include: Documentation of termination of benefits from benefit provider. Other documentation, as applicable.
   Examples include a divorce decree, court order, etc.

4. _________ Separation or Divorce of: ________ Parent or ________Spouse after filing 2020-2021 FAFSA (Separation must be before 12/31/2020)

   Reasons for consideration include: Parent (if dependent) or spouse (if independent) no longer residing in the household due to separations or divorce.

   Documentation to include: All 2018 W-2’s must be submitted to verify separation of income. Separation agreement, divorce decree, or substantial evidence (copy of mortgage/lease, utility bills, etc.) proving parent, if dependent, or spouse, if independent, is residing in separate residence. Parties in question living in the same dwelling cannot be considered.

5. _________ Student Marriage after filing 2020-2021 FAFSA (Marriage must be before 10/1/2020)

   Reasons for consideration include: Student was single at the time they filed the FAFSA, but is now married.

   Documentation to include: Copy of marriage certificate, copy of spouse’s 2018 tax return transcript or signed 1040, and copy of spouse’s 2018 W-2’s. Copy of 2018 IRS Statement of Non-filer letter (if spouse did not file a tax return in 2018).

6. _________ Death of: ________ Parent or ________Spouse after filing 2020-2021 FAFSA

   Reasons for consideration include: Parent (if dependent) or spouse (if independent) deceased after student filed 2020-2021 FAFSA.

   Documentation to include: Copy of death certificate and documentation of death benefits.

7. _________ Parent of Dependent Student also attending college for 2020-2021 aid year

   Reasons for consideration include: Parent of UMBC student is degree seeking at a post-secondary institution. Parent must be enrolled at least ½ time (usually 6 credits) in a degree seeking program and have been counted in the 2020-2021 FAFSA household size.

   Documentation to include: Official class schedule (copy) from parent’s educational institution.
2020-2021 Change in Circumstances
2020-2021 Verification Form - Independent

An electronic form may be found and submitted here: https://ofas.umbc.edu/eforms?id=21IndVerif

Student Name: ____________________________      Campus ID: ____________________

Family Information
List the people in your household. Include:

- Yourself and your spouse, if married
- Your children, if you will provide more than half of their support from July 1st, 2020 through June 30th, 2021; and
- And other people who live with you and receive more than half their support from you and will continue to live with you and receive more than half of their support from you through June 30th, 2021.

Write the names of the household members. Also write the name of the college for any household member who will be attending college at least half time (6 credits) between July 1st, 2020 and June 30th, 2021. If you need more space, attach a separate page.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Age</th>
<th>Relationship</th>
<th>Name of College</th>
<th>Will be enrolled at least half time? Yes or No</th>
</tr>
</thead>
<tbody>
<tr>
<td>SELF</td>
<td></td>
<td>UMBC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The household information above will be compared against your FAFSA application. Since this statement is being provided after the FAFSA, it will be accepted as most current and accurate. If necessary, our office will update your FAFSA.

Tax Filing Status

Student  Spouse (if married) I have completed a 2018 Federal Tax Return.

- I worked in 2018 but was not required to file a 2018 Federal Tax Return. I am submitting:
  1. An Income Verification Form
  2. Copies of all my W2s. For any wages earned that a W2 was not received, I am providing an explanation on the Income Verification Form for why a W2 is not available.
  3. *A Verification of Non-filing Letter from the IRS (or other foreign government).

- I did not work in 2018.
  *Additional Requirement for student and/or spouse who did not work: Submit a Verification of Non-filing Letter from the IRS (or other foreign government).

*The Verification of Non-filing Letter must be dated later than October 1, 2019 and can be requested on line at www.irs.gov by selecting ‘Get a Tax Transcript’ and following the prompts to obtain the letter. Alternately, it may be obtained using the paper IRS Form 4506-T and checking box 7. DO NOT request the IRS send the letter directly to UMBC.

Signatures
Warning: If you purposefully give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both. Signing this document certifies the information reported is correct and accurate.

Student Signature: ____________________________ Date: ______________
2020-2021 Change in Circumstances
2020-2021 Verification Form - Dependent

An electronic form may be found and submitted here: https://ofas.umbc.edu/eforms?id=21DepVerif

Student Name: ____________________________      Campus ID: ____________________

Family Information
List the people in your parent’s household. Include:

- Yourself and your parent(s), including stepparent, even if you do not live with your parent(s). If your legal parents are separated and not living together, or if you are not sure who to list, please use the following chart to determine which parent(s) to include on this form: https://studentaid.ed.gov/sa/sites/default/files/who-is-my-parent.png
- Your parent’s children, even if they do not live with your parent(s) if:
  - Your parent will provide more than half of their support from July 1st, 2020 through June 30th, 2021; OR
  - The children would be required to provide parental information when applying for federal aid
- Any other people who live with your parents and your parents provide more than half their support and will continue to live with and provide more than half of their support through June 30th, 2021.

Write the names of the household members. Also write the name of the college for any household member who will be attending college at least half time (6 credits) between July 1st, 2020 and June 30th, 2021. If you need more space, attach a separate page.

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<tbody>
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<td></td>
<td></td>
</tr>
<tr>
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3. *Additional Requirement for parents who did not file: A Verification of Non-filing Letter from the IRS (or other foreign government).

□       □

I did not work in 2018.

*Additional Requirement for parents who did not work: Attach a Verification of Non-filing Letter from the IRS (or other foreign government).

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Signatures

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Student Signature: ___________________________________________ Date: _____________

Parent Signature: ___________________________________________ Date: _____________