



Income Reduction/Special Circumstances Appeal 2023-2024

Student Name: _____ Student ID _____

You may request a review of your financial aid package at any time due to significant changes in your family's circumstances that affect your ability to contribute to college costs by completing this Income Reduction/Special Circumstances Appeal.

Special circumstances are defined as unexpected events or situations beyond your control. Examples include loss of employment, reduction in work hours, loss of benefits such as Social Security or child support, long-term illness or disability, unusually high medical expenses, or the death of a spouse or dependent student's custodial parent after filing the FAFSA.

We cannot consider appeals based on credit card debt, car or mortgage payments, wedding/celebration expenses, consumer debt, private school costs, vacations or other non-discretionary expenses.

In addition to completing this form and providing all required supporting documentation, all appeals must include the following:

- 1) A typed (or neatly hand-written) signed statement explaining your special circumstances.
- 2) If not previously submitted:
 - a. Completed Dependent Verification Worksheet if you were required to provide parent information on the FAFSA, including the required 2021 federal tax returns or 2021 IRS transcripts and W-2(s) for both you and your parent(s), if applicable, OR
 - b. Completed Independent Verification Worksheet if you were not required to provide parent information on the FAFSA, including the required 2021 federal tax returns or 2021 IRS transcripts and W-2(s), if applicable.
- 3) Completed Sections A & B of this appeal.
- 4) Appeals submitted after 12/31/23 must include copies of all 2023 W-2 forms as well as 2023 federal tax returns. If you submit an appeal prior to 12/31/23, and it is approved, you may be required to provide 2023 federal tax returns before your Spring aid is disbursed.

* Please note that omitting required documentation will cause delays in your appeal's review, or your appeal may be denied.

Appeal Deadline (including all documentation): March 1, 2024

Section A: Reason for Appeal and Additional Required Documentation (Check All That Apply)



A. Unemployment or reduction of hours or wages – PLEASE NOTE THAT APPEALS BASED ON A SIGNIFICANT REDUCTION IN 2023 INCOME WILL NOT BE ACCEPTED UNTIL OCTOBER 1, 2023.

Student, spouse or parent(s) who worked in 2021 is now unemployed or has had work hours and/or wage rate reduced.

Additional Required documentation:

- o Copy of last pay stub(s) from previous employer(s)
- o Copy of letter from employer on letterhead verifying the release from employment or reduction in hours/wages, the date the change became effective and the duration of the reduction if temporary
- o Documentation of unemployment benefits
- o Copy of disability benefit statement if applicable



B. Medical or dental expenses

You, your spouse or parent(s) made payments for expenses not covered by insurance. **Medical expenses for which you received no insurance or other reimbursement must exceed 11% of the family's taxable income in order to be considered** for appeal.

Additional Required documentation:

- o Submit copies of receipts or billing statements showing amounts for which you received no insurance or other reimbursement, as well as documentation of payment.
- o Total medical expenses for which you received no insurance or other reimbursement(s):
\$ _____



C. Death of spouse or parent

Spouse or parent(s) passed away during, or after, 2021.

Required documentation:

- o Copy of death certificate, obituary, or funeral program
- o Documentation of any insurance, pension or retirement benefits received
- o Documentation of any changes in assets resulting from inheritance



D. Reduction or loss of support or benefits

Student, spouse or parent(s) received support or benefits in 2021 that have been terminated or reduced. Support or benefits may include: worker's compensation, unemployment benefits, child support, Social Security benefits, pensions, etc.

Required documentation:

- o Last check stub or printout of benefit received
- o Letter from agency on letterhead verifying the date and amount of benefit lost



E. One-time income

Student, spouse or parent(s) received non-recurring income in 2021 from a pension, IRA, annuity, inheritance, settlement, etc.

Required documentation:

- o Copy of form 1099 or other statement from paying agency showing the one-time income
- o Explain why the one-time income is not available for education expenses; include documentation



F. Other

You, your spouse, or parent has other unusual circumstances not listed above.

Required documentation:

- o Explain the circumstances in detail, including the impact on your ability to pay for your educational expenses
- o Attach supporting documentation of the circumstances

Section B: Estimated Income Worksheet

The following sections require you to provide **your expected income for 2023**. Please provide figures for the **entire year**; do not report hourly or monthly wages or income. Include **all** income received from January 1, 2023 until now, and estimate amounts to be received from now until December 31, 2023 if this form is being submitted prior to January 1, 2024.

Do not leave any line blank. List the yearly amount you expect to receive in 2023. If no income is expected to be received from the specific source listed, you MUST write “\$0”.

Estimated 2023 Income Worksheet	PARENT 1 [dependent students]	PARENT 2 [dependent students]	Student	Spouse [independent student]
Gross earnings received from work				
Taxable interest/dividend income				
Taxable pensions/annuities				
Unemployment compensation				
Severance Pay				
Alimony/Spousal Support				
Taxable Social Security benefits				
Other taxed income [i.e. business, rental]				
Total taxable income				
Tax exempt interest/dividend income				
Workers' compensation				
Untaxed Social Security benefits				
Child support received				
Contributions to tax-deferred IRA/pension/savings plan				
Other untaxed income from:				
Total non-taxable income				

Certification and Signature(s):

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Each person signing this form certifies that all the information reported on it is complete and correct. The student, and at least one parent (if student is dependent), must sign and date this form. A signature of the student's spouse (if student is married) is optional.

Student Signature

Date

Parent/Spouse Signature (if applicable)

Date

Please submit this form and all requested documentation to:

Massasoit Community College
Financial Aid Office
One Massasoit Blvd.
Brockton, MA 02302

To submit documentation in person, please visit us in Student Central, located in the Upper Level of the Student Center on the Brockton Campus, the Enrollment Center on the Canton Campus, or in the main office at the Middleboro Instructional Site.

Appeals and supporting documentation may also be submitted online at
<https://massasoit.edu/enrollment/paying-for-college/financial-aid/financial-aid-form-submission/>

Documentation may also be faxed to (508) 427-1232.

To ensure the protection of your personal information, please do not submit any documents with Personally Identifiable Information (PII), including your social security number, via email.

Thank you for your interest in Massasoit Community College. If you have any questions, please contact the Financial Aid Office at 508-588-9100, ext. 1479. You may also access your personal financial aid information by clicking on the "MyMassasoit" link on our website.