

2026-2027 CWRU Financial Aid Special Circumstances Appeal Form

At Case Western Reserve University, we recognize that a family's financial situation can change unexpectedly. While the FAFSA and CSS Profile provide a snapshot of your past finances, we understand those figures may not accurately reflect your current ability to contribute toward educational costs. If your financial circumstances have changed significantly, we can reevaluate your need-based financial aid eligibility. While each request is reviewed on a case-by-case basis, please note that submission does not guarantee an increase in your financial aid offer.

Special Circumstance Examples and Exclusions

The following are common examples of special circumstances that may be considered for review:

- Involuntary loss or reduction of income for a student, spouse, or parent.
- Unusual and extreme medical or dental expenses (typically exceeding 11% of your income).
- Death of a parent or spouse.
- Maintaining two households due to employment (at least 75 miles apart).
- Other significant financial challenges that were not reflected in your initial applications.

Please note that we generally cannot grant an appeal based on discretionary spending, standard consumer debt, or expected fluctuations in assets and income (such as self-employment, overtime, or bonuses).

Undergraduate Student Submission Process

To begin your appeal, you will need your CWRU network ID and passphrase to upload this completed form and all supporting documents to our secure portal: <https://go.case.edu/register/FA-Eval>.

You must provide the following for your appeal to be reviewed:

- **Section A** – A detailed explanation of your circumstances, the specific impact they have on your financial resources, and the date the change occurred.
- **Section B** – Third-party evidence of the change. Examples include:
 - For loss of income: Signed tax returns, last pay stubs, or severance/unemployment statements.
 - For medical expenses: Signed federal tax returns listing expenses or copies of paid receipts.
 - For the death of a parent: A copy of the death notice or certificate.
- **Section C (if applicable)** – The Estimated 2026 Income is only required if you are requesting a review based on 2026 finances.

Timeline and Next Steps

We aim to review your request as quickly as possible. Please keep the following timing in mind:

- Ensure you have submitted any outstanding verification documents requested in your My Financial Aid portal.
- Reviews for recently admitted students begin in March. Reviews for current students begin in July.
- Once all documents are submitted, a review usually takes about 2 weeks.

If you have any questions or are unsure if your situation qualifies, please reach out. We are happy to talk you through the process. You can reach us at financialaid@case.edu or 216.368.4530.

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Student's Last Name	Student's First Name	SIS/PeopleSoft Student ID	Date of Birth
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A. Explanation of your special circumstance

If your financial situation has changed significantly from the information reported on the CSS Profile and FAFSA, you might qualify for a reevaluation of your need-based financial aid. Examples include:

- Involuntary changes in income
- Unusual and extreme expenses
- Other financial challenges not reflected in your forms

Please use the space below to explain your circumstances, the impact they have on your financial resources, and the person being affected. Include the dates of your circumstances. *Attach a separate page if needed.*

B. Supporting Documentation

In addition to the explanation statement in section A, all appeal requests require additional supporting documentation. Your circumstances, as well as when they occurred, will help to determine what type of documentation is required. Below are examples of common circumstances and typically requested documentation. This list does not cover all circumstances and documentation.

Circumstance Example	Typically Requested Documentation
Loss or Reduction of Employment in 2024 or 2025, and you are requesting that we use your 2025 finances	Signed 2025 IRS tax return, as well as a statement from the employer, last pay stub, or severance/unemployment info
Loss or Reduction of Employment in 2025 or 2026, and you are requesting that we use your 2026 finances	Complete section C below, as well as a statement from the employer, last pay stub, or severance/unemployment info
Maintaining two households due to employment that are at least 75 miles apart	Rental agreement for secondary residence, pay stub from employment
Medical expenses greater than 11% of income	Signed federal tax return listing the medical expense for the year being used or receipts of the amount paid
Death of a parent/spouse	Copy of a death notice

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C. Estimated 2026 Income – Can only be accepted after June 1, 2026

This section should be completed for any person(s) requesting that we use their 2026 information. It should be completed only for the person(s) whose income is being affected by the special circumstance. Students, or their spouse, should report estimated income for the academic year: *June 1, 2026, through May 31, 2027*. Parent(s) will report estimated income based on the calendar year: *January 1, 2026, through December 31, 2026*.

Documentation of how you came to these figures may be requested. Proactively providing them can help prevent delays.

2026 Estimated Taxable Income			2026 Estimated Untaxable Income		
Income Source	Student/Spouse	Parent(s)	Income Source	Student/Spouse	Parent(s)
Employment (Student/Parent 1)			Social Security		
Employment (Spouse/Parent 2)			Worker's Compensation		
Interest / Dividend			Disability		
Alimony			Retirement		
Business / Farm			ADC, TANF, Welfare Benefits		
Partnership / Corp			Housing Allowance		
Capital Gains			Child Support		
Pensions / Annuities			Pensions / Annuities		
Rents / Royalties			Veteran's Non-Educational Benefits		
Unemployment			Deductible IRA / SEP		
Other:			Other:		
Total Taxable Income			Total Untaxed Income		

I/we affirm that the information provided on, and submitted with, this form are true and complete to the best of my/our knowledge. Upon request, I/we will provide additional documentation to verify the information provided. **Electronic signatures are not accepted.**

Student's Signature	Date
Parent's signature (only one signature is required)	Date