2027-2028 Case Western Reserve University
Financial Aid Special Circumstances Appeal Form

While the FAFSA and CSS Profile provide a snapshot of your family's 2025 finances, we understand those figures may not accurately reflect your current ability to contribute toward educational costs. If a specific event has significantly changed your family's resources since then, you can appeal and ask for a new review of your need-based aid eligibility. While each appeal is reviewed on a case-by-case basis, please note that submission does not guarantee an increase in your financial aid offer. It does not change merit-based scholarships.

Students making an enrollment decision should base it on the financial aid offer they have until their review is completed.

Examples of situations that may be reviewed:

- Involuntary loss or reduction of income for a student, spouse, or parent such as layoffs, employer closures, and employer-imposed hour cuts
- Unreimbursed medical or dental expenses that are unusually high (typically more than 11% of income)
- Death of a parent or spouse
- A parent maintaining two households at least 75 miles apart due to employment

Examples of situations we generally can't review:

- Credit card balances, car payments, and loans
- Lifestyle or optional spending
- Normal ups and downs in income, such as a slower year for a self-employed parent or less overtime or bonus pay

If you're not sure whether an appeal can be considered for your circumstances or have other questions, contact us at financialaid@case.edu or 216.368.4530 for assistance.

Before you submit

Ensure the following have been completed:

- You've submitted the FAFSA (003137) and CSS Profile (1105) to CWRU using the correct school code.
- Any requested documents have been submitted.
- You have documentation from someone outside your family (such as an employer, government agency, or medical provider) to support your request.
- You have your CWRU network ID and passphrase for your portal: https://go.case.edu/register/FA-Eval.

Timeline

You can submit your appeal now, and documents you upload will be saved, but we can't start your review until all of the required information is received. A review can take 2 to 3 weeks and can be longer during busier times.

What happened	What we compare	What's typically needed	Review begins
Death of a parent or a second household for work	Your current situation vs your 2025 situation	Written explanation, event proof	Once your request is complete
Change affecting 2026 information	2025 actual information vs 2026 actual information	Written explanation, event proof, signed 2026 tax return (if applicable)	After the 2026 return is complete
Change in 2027 information (known or expected)	2025 information vs 2027 estimated information	Written explanation, event proof, Section C (2027 estimate)	June 2027 or later
Change in 2025 information	Already on FAFSA/Profile	Nothing	Not eligible

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Student's Last Name	Student's First Name	SIS/PeopleSoft Student ID ***(1234567)***

A. Written explanation of your special circumstance

Please use the space below to explain your circumstances. Make sure your explanation specifies who was affected, what happened, and when the change occurred. Please also include the previous and current income or expense amounts, whether the change is ongoing or temporary, and whether any replacement income is being received. ***Attach a separate page if needed.***

B. Supporting Documentation

In addition to the explanation statement in Section A, all appeal requests require supporting documentation. Below are examples of common circumstances and the documentation we typically request. This list does not cover all circumstances or documentation, and we will follow up via email as needed.

Circumstance Example	Typically Requested Documentation
Involuntary loss or reduction of income, and you are requesting that we use your ***2026*** income	Signed 2026 IRS tax return, plus a statement from the employer, final pay stub, or severance/unemployment info
Involuntary loss or reduction of income, and you are requesting that we use your ***2027*** income	Complete Section C below, plus a statement from the employer, final pay stub, or severance/unemployment info
A parent maintaining two households at least 75 miles apart due to employment	Rental agreement for the secondary residence and a pay stub from employment
Unreimbursed medical or dental expenses that are unusually high (typically more than 11% of income)	Receipts or statements showing amounts you paid, and any insurance statements showing what was reimbursed
Death of a parent/spouse	Copy of a death notice, certificate, or obituary

By signing below, I certify that all information reported on this form is complete and correct. I understand that providing false or misleading information may result in the cancellation of student aid.

Note: We only accept handwritten (wet) signatures or digital signatures drawn with a stylus or mouse. Typed names are not accepted.

Student's Signature – Sign here for Sections A–B. Section C has its own signature.	Date
Parent's Signature (only one signature is required) – Sign here for Sections A–B. Section C has its own signature.	Date

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C. Estimated 2027 Income – Reviews will begin after June 1, 2027

This section should only be completed for those requesting that we use their 2027 information. Report all expected income. Students (and their spouse, if applicable) should report estimated income for the academic year: ***June 1, 2027, through May 31, 2028***. Parent(s) should report estimated income based on the calendar year: ***January 1, 2027, through December 31, 2027***.

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

2027 Estimated Taxable Income				*2027 Estimated Untaxed Income*			
Income Source	***Student***	***Parent 1*** *or Student's Spouse*	***Parent 2*** *if applicable*	**Income Source**	***Student***	***Parent 1*** *or Student's Spouse*	***Parent 2*** *if applicable*
Employment				**Social Security**			
Interest				**Workers' Compensation**			
Dividend				**Disability**			
Alimony				**Retirement**			
Business / Farm				**TANF or other cash assistance**			
Partnership / Corp				**Housing Allowance**			
Capital Gains				**Child Support**			
Pensions / Annuities				**Pensions / Annuities**			
Rents / Royalties				**Veterans benefits (not educational)**			
Unemployment				**Deductible IRA / SEP**			
Other (explain)				**Other (explain)**			
Total Taxable Income				**Total Untaxed Income**			

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Note: We only accept handwritten (wet) signatures or digital signatures drawn with a stylus or mouse. Typed names are not accepted.

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