

**FINANCIAL AID/VETERAN SERVICES/SCHOLARSHIPS**  
**Professional Judgment Request Form**  
**2015 – 2016**

**INSTRUCTIONS:**

According to federal laws and regulations, a family’s 2014 income is used to assess financial need for the 2015-2016 school year. Professional Judgment refers to the school’s authority to make adjustments to the data elements reported on the Free Application for Federal Student Aid (FAFSA) to recalculate the Expected Family Contribution (EFC). If a student is required to first appeal due to aid reinstatement, that process must be completed prior to a Professional Judgment evaluation.

\_\_\_\_\_  
**Student Name: Last, First, M.I.**

\_\_\_\_\_  
**Student SSN/ID#**

\_\_\_\_\_  
**Father/Step-father Name: Last, First, M.I.**

\_\_\_\_\_  
**SSN\***

\_\_\_\_\_  
**Mother/Step-mother Name: Last, First, M.I.**

\_\_\_\_\_  
**SSN\***

If you believe you have a special circumstance, you may request the Financial Aid Office to re-evaluate your family’s ability to pay the cost to attend college. In order to do so, you and your family must complete the attached form and provide **documentation of your situation**.

**Please attach the following required documentation:**

- **Dependent Students (students required to provide parental information on FAFSA) must submit the following documents:**
  1. Student/Parent/Stepparent(s) 2014 IRS Tax Return Transcripts and all 2014 W-2 forms.
  2. Student/Parent/Stepparent(s) copy of 2015 IRS Tax Return Transcripts and all 2015 W-2 forms (if submitting this information **after** Dec. 31, 2015).
  3. 1099 forms as proof of other income or Pension/IRA/Annuity payments.
  4. If the parental Professional Judgment is for recent separation from the Armed Forces, a copy of the parent’s DD-214 form.
  5. Completed 2015-2016 Dependent Verification Document.
- **Independent Students (students not required to provide parental information on FAFSA) must submit the following documents:**
  1. Student/Spouse 2014 IRS Tax Return Transcripts and all 2014 W-2 forms.
  2. Student/Spouse 2015 IRS Tax Return Transcripts and all 2015 W-2 forms (if submitting this information **after** Dec. 31, 2015).
  3. 1099 forms as proof of other income or Pension/IRA/Annuity payments.
  4. If the student Professional Judgment is for recent separation from the Armed Forces, a copy of the student’s/spouse’s DD-214 form.
  5. 2015-2016 Independent Verification Document.

**Examples of Documentation to Submit:**

- |   |                          |                          |
|---|--------------------------|--------------------------|
| -Layoff notice or letter from employer  | -Proof of current income | -Proof of Marital Status |
| -Proof of unemployment benefits   | -Death Certificate       |                          |
| -Medical records, proof of disability benefits  | -Workers Compensation    |                          |
| -Social Security Statement  | -Child Support Statement |                          |
| -Divorce decree or legal separation documents or letter from attorney stating marital status of parties involved. |                          |                          |
| -Proof of out-of-pocket expenses paid in 2014 (childcare/eldercare/medical/dental).                               |                          |                          |

**NOTE:** The Financial Aid Office will re-evaluate your financial aid eligibility **ONLY** after receiving all requested and required documentation.

## Student Checklist

Please submit this checklist with your completed  
Professional Judgment Request package.

• **Completed Request Form (Mandatory)**

Mark  
Yes    No

**Dependent Students:**

- |  |       |       |
|--|-------|-------|
| 1. Attach copies of Student/Parent/Stepparent(s) 2014 IRS Tax Return Transcripts   | _____ | _____ |
| 2. Attach copies of Student/Parent/Stepparent(s) 2014 W-2 forms  | _____ | _____ |
| 3. Attach copies of Student/Parent/Stepparent(s) 1099 forms as proof of other income or Pension/IRA/Annuity payments   | _____ | _____ |
| 4. If the parental Professional Judgment Request is for a recent separation from the Armed Forces, provide a copy of the parent's DD-214 form  | _____ | _____ |
| 5. Complete a 2015-2016 Verification Document  | _____ | _____ |
| 6. Attach copies of Student/Parent/Stepparent(s) 2015 IRS Tax Return Transcripts and 2015 W-2 forms (if the Professional Judgment request is submitted <b>after</b> December 31, 2015) | _____ | _____ |
| 7. Latest pay stub for Student/Parent/Stepparent(s)  | _____ | _____ |

**Independent Students:**

- |  |       |       |
|--|-------|-------|
| 1. Attach copies of Student/Spouse 2014 IRS Tax Return Transcripts   | _____ | _____ |
| 2. Attach copies of Student/Spouse 2014 W-2 forms  | _____ | _____ |
| 3. Attach copies of Student/Spouse 1099 forms as proof of other income or Pension/IRA/Annuity payments   | _____ | _____ |
| 4. If the Professional Judgment Request is for a recent separation from the Armed Forces, provide a copy of the student/spouse DD-214 form                               | _____ | _____ |
| 5. Complete a 2015-2016 Verification Document  | _____ | _____ |
| 6. Attach copies of Student/Spouse 2015 IRS Tax Return Transcripts and 2015 W-2 forms (if the Professional Judgment request is submitted <b>after</b> December 31, 2015) | _____ | _____ |
| 7. Latest pay stub for Student/Spouse  | _____ | _____ |

**Examples of documentation to submit:**

- |   |       |       |
|---|-------|-------|
| • Proof of Unemployment Compensation from issuing authority   | _____ | _____ |
| • Layoff/Termination notice or letter from employer   | _____ | _____ |
| • Proof of Marital Status (marriage license/divorce decrees/legal separation documents) for professional judgments involving marital issues | _____ | _____ |
| • Death certificates for professional judgments involving death issues  | _____ | _____ |
| • Veterans Administration documentation for cases involving V.A. disability compensation awards   | _____ | _____ |
| • Workers Compensation documentation  | _____ | _____ |
| • Social Security statements for all social security recipients   | _____ | _____ |
| • Copies of medical record documentation as required  | _____ | _____ |
| • Proof of Child Support received   | _____ | _____ |

These are the routine documents required for various professional judgment packages.  
The Financial Aid Office may request additional documentation based upon their review.

**STEP ONE: Estimated Income for Current Calendar Year**

Please provide anticipated taxable and untaxable income in the table below. If you are an independent student (divorced/separated), include only your income information. If you are a dependent student and your parents are divorced or separated, include only your custodial parent's income information. If your custodial parent has remarried, include their spouse's income information. **Write zero (0) if item doesn't apply.**

<b>ESTIMATED INCOME FOR January 1, 2015 to December 31, 2015</b>	<b>ACTUAL Jan. 1, 2015 to today</b>	<b>ESTIMATED Today to Dec. 31, 2015</b>	<b>TOTAL (Actual + Estimated)</b>
<b><i>Dependent: (Students required to provide parental information on FAFSA)</i></b>			
Father/Step-father's gross wages, salaries, tips (include severance pay, disability payments and other income from work)	\$	\$	\$
Mother/Step-mother's gross wages, salaries, tips (include severance pay, disability payments and other income from work)	\$	\$	\$
Other Taxable Income (unemployment)	\$	\$	\$
Other Untaxable Income & Benefits: <ul style="list-style-type: none"> <li>• Payments to Tax-Deferred pension and saving plan</li> <li>• IRA deductions/payment to SEP, SIMPLE, Keogh</li> <li>• Child Support Received</li> <li>• Tax Exempt Interest Income</li> <li>• Untaxed Portions of IRA distributions</li> <li>• Untaxed Pension and Annuity Income</li> <li>• Housing, food and other living allowances paid to you</li> <li>• Non-educational Veterans Benefits</li> <li>• Worker's Compensation/Disability</li> <li>• Bills paid on your behalf</li> </ul>	\$	\$	\$
<b><i>Independent: (Students not required to provide parental information on FAFSA)</i></b>			
Student's gross wages, salaries, tips (include severance pay, disability payments and other income from work)	\$	\$	\$
Spouse's gross wages, salaries, tips (include severance pay, disability payments and other income from work)	\$	\$	\$
Other Taxable Income (unemployment)	\$	\$	\$
Other Untaxable Income & Benefits: <ul style="list-style-type: none"> <li>• Payments to Tax-Deferred pension and saving plan</li> <li>• IRA deductions/payment to SEP, SIMPLE, Keogh</li> <li>• Child Support Received</li> <li>• Tax Exempt Interest Income</li> <li>• Untaxed Portions of IRA distributions</li> <li>• Untaxed Pension and Annuity Income</li> <li>• Housing, food and other living allowances paid to you</li> <li>• Non-educational Veterans Benefits</li> <li>• Worker's Compensation/Disability</li> <li>• Bills paid on your behalf</li> </ul>	\$	\$	\$

Student's Name: \_\_\_\_\_ SSN:\* \_\_\_\_\_

**STEP TWO: Explanation of Special Circumstances (below)**

Please provide a detailed statement of explanation regarding your current situation for which you are asking us to consider making adjustments. Please remember to include applicable dates and any documentation supporting your circumstances. If sufficient documentation is not provided, the Professional Judgment will be denied as the application will be determined incomplete.

**Please print:**


**STEP THREE: Certification**

By signing below, I certify that the information provided on this form is true and correct to the best of my knowledge. I understand that completing this form does not guarantee financial aid will be increased. I agree that if requested, I will provide documentation to support the information provided on this form. I understand the Financial Aid Office reserves the right to review all requests on a case by case basis and make adjustments if deemed appropriate and that this decision is final. There is no appeal to USDOE available.

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

\_\_\_\_\_  
 Student Signature (Required)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Parent Signature (Required if dependent)

\_\_\_\_\_  
 Date

**FOR FA/VA OFFICE USE ONLY: Comments**


FA/VA Staff \_\_\_\_\_ Date \_\_\_\_\_

\*Required and authorized by Title IV of the Higher Education Act of 1965, as amended (§§483 and 484); 20 USC 1078, 1090, 1091 & 1092; 34 CFR 668.16; 34 CFR 668.33; 34 CFR 668.36; 34 CFR 668.32(i) and 34 CFR 668.36