

**FINANCIAL AID/VETERAN SERVICES/SCHOLARSHIPS
Professional Judgment Request Form
2016 – 2017**

INSTRUCTIONS:

According to federal laws and regulations, a family’s 2015 income is used to assess financial need for the 2016-2017 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 for federal 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) 2015 IRS Tax Return Transcripts and all 2015 W-2 forms.
 2. Student/Parent/Stepparent(s) copy of 2016 IRS Tax Return Transcripts and all 2016 W-2 forms (if submitting this information **after** Dec. 31, 2016).
 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 2016-2017 Dependent Verification Document.
- **Independent Students (students not required to provide parental information on FAFSA) must submit the following documents:**
 1. Student/Spouse 2015 IRS Tax Return Transcripts and all 2015 W-2 forms.
 2. Student/Spouse 2016 IRS Tax Return Transcripts and all 2016 W-2 forms (if submitting this information **after** Dec. 31, 2016).
 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. Completed 2016-2017 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 2015 (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 Form

• **Completed Request Form (Mandatory)**

Mark
Yes No

Dependent Students:

- | | | |
|--|-------|-------|
| 1. Attach copies of Student/Parent/Stepparent(s) 2015 IRS Tax Return Transcripts | _____ | _____ |
| 2. Attach copies of Student/Parent/Stepparent(s) 2015 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 2016-2017 Dependent Verification Document | _____ | _____ |
| 6. Attach copies of Student/Parent/Stepparent(s) 2016 IRS Tax Return Transcripts and 2016 W-2 forms (if the Professional Judgment request is submitted after December 31, 2016) | _____ | _____ |
| 7. Latest pay stub for Student/Parent/Stepparent(s) | _____ | _____ |

Independent Students:

- | | | |
|--|-------|-------|
| 1. Attach copies of Student/Spouse 2015 IRS Tax Return Transcripts | _____ | _____ |
| 2. Attach copies of Student/Spouse 2015 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 2016-2017 Independent Verification Document | _____ | _____ |
| 6. Attach copies of Student/Spouse 2016 IRS Tax Return Transcripts and 2016 W-2 forms (if the Professional Judgment request is submitted after December 31, 2016) | _____ | _____ |
| 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.

Student's Name: _____ SSN:* _____

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 as well. **Write zero (0) if item doesn't apply.**

ESTIMATED INCOME FOR January 1, 2016 to December 31, 2016	ACTUAL Jan. 1, 2016 to today	ESTIMATED Today to Dec. 31, 2016	TOTAL (Actual + Estimated)
<i>Dependent: (Students required to provide parental information on FAFSA)</i>			
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"> • Payments to Tax-Deferred pension and saving plan • IRA deductions/payment to SEP, SIMPLE, Keogh • Child Support Received • Tax Exempt Interest Income • Untaxed Portions of IRA distributions • Untaxed Pension and Annuity Income • Housing, food and other living allowances paid to you • Non-educational Veterans Benefits • Worker's Compensation/Disability • Bills paid on your behalf 	\$	\$	\$
<i>Independent: (Students not required to provide parental information on FAFSA)</i>			
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"> • Payments to Tax-Deferred pension and saving plan • IRA deductions/payment to SEP, SIMPLE, Keogh • Child Support Received • Tax Exempt Interest Income • Untaxed Portions of IRA distributions • Untaxed Pension and Annuity Income • Housing, food and other living allowances paid to you • Non-educational Veterans Benefits • Worker's Compensation/Disability • Bills paid on your behalf 	\$	\$	\$

Student's Name: _____ SSN:* _____

