

2023-2024

Professional Judgment Appeal Form



Student Name _____

Student ID# _____

Elizabethtown College recognizes that standard financial aid forms do not always capture the full financial profile of our students and their families. Through the use of Professional Judgment (PJ), the Financial Aid Office may be able to make adjustments to your FAFSA which could result in a recalculation of aid eligibility. All PJ requests are reviewed to determine if a student qualifies for an adjustment to their financial aid eligibility status. Please note that Professional Judgment requests will be processed with the understanding that it is the responsibility of the student to utilize all federal financial aid sources made available to them. **Please review the options below and check all circumstances that apply. Please submit this form and all required documents through our Secure Document Upload. If you have questions do not hesitate to contact the Financial Aid Office.**

☐ **Major medical expenses incurred between January 2021 and the present that were not covered by insurance and were paid for out of pocket**

• **DO NOT** include payments for health insurance premiums. **Expenses must be above 11% of AGI.** The medical expense must be out of pocket expenses in which you did not receive a tax credit on your Tax Return.

• **REQUIRED DOCUMENTS:**

- Itemized list of medical expenses not covered by insurance and paid out of pocket
- 2021 or 2022 Tax Transcript and Schedule A
- Proof of payment

☐ **Tuition payments made for dependent children attending private school in kindergarten through 12th grade**

• **REQUIRED DOCUMENTS:**

- Please provide proof of payment for the 2023-2024 academic year
- Age(s) of dependent children: _____
- Name(s) of dependent children: _____

☐ **Parent in college at least half-time in a degree-seeking program**

• **REQUIRED DOCUMENTS:**

- Proof of enrollment for the 2023-2024 academic year
- Proof of tuition payment for the 2023-2024 academic year
- Financial aid award letter and/or copy of employer's tuition benefit policy

☐ **Child Support received ended or reduced**

• **REQUIRED DOCUMENTS:**

- If you indicated an amount of child support received in 2021 on the FAFSA, and this support ended or was reduced after 2021, please indicate the date this occurred and current amount if reduced: _____

☐ **Lump sum distribution or non-recurring income in 2021 has inflated your Adjusted Gross Income**

- Please note that in some cases, not all distributions or non-recurring income can be removed under Professional Judgment. Your counselor will evaluate your request to determine if Professional Judgment can be exercised. Please also note that in most cases, students are only able to apply for this option once during the student's tenure at Elizabethtown.

• **REQUIRED DOCUMENTS:**

- Please indicate amount here \$ _____
- Copies of your 2021 IRS Tax Return Transcript
- An itemized statement detailing how this additional income was spent in 2021 and receipts
- 2021 Form 1099-R (if applicable)

☐ **Divorce or Separation**

• **REQUIRED DOCUMENTS:**

- Copy of separation, divorce decree or copy of mortgage/lease proving separate residences
- Copy of 2021 W-2(s) and 2021 Tax Transcript

☐ **Rollover**

• **REQUIRED DOCUMENTS:**

- Signed statement with the rollover amount
- Notation on the tax transcript that includes the word "rollover" beside any applicable item (annotation must be signed and dated by the filer)

☐ **Decrease in Parent(s) and/or Student's Income after January 1, 2022 as a result of job loss, retirement, death/disability, or other wage reduction. The reduction in income must have been for at least six months.**

☐ **2022 Income**

☐ **2023 Expected Income**

FAFSA Filer with Change in Income	STUDENT	PARENT 1	PARENT 2
Expected Earned From Work	\$	\$	\$
Other Income (Unemployment, Workman's Comp, etc.)	\$	\$	\$
Total Expected Income	\$	\$	\$

• **REQUIRED DOCUMENTS:**

- Signed and dated letter on company letterhead from employer listing last date of employment, earning from January 1, 2023 through last date of employment
- Copy of last pay stub.
- Documentation of severance/benefits/unemployment compensation
- Copy of your 2021 and/or 2022 IRS Tax Return Transcript and W-2(s)
- Employer offer letter if reemployed
- All supporting documentation

☐ **Unusual Circumstances - in rare instances such as abuse, abandonment, or neglect (for homeless youth or at risk homeless youth determination please see the Dependency Verification form)**

• **REQUIRED DOCUMENTS:**

- A personal statement regarding their home situation along with statements from three Professional Third parties whom are privy to the student and their parents' relationship and situation. Examples of Professional Third parties include: social worker, clergy, counselor, medical provider, law enforcement officer, government/state agency, court, or teacher. Statements should be on letter head, signed and dated with the Professional's title and contact information. **Please note submission of requested statements may require additional information or may not be acceptable.**

☐ **Custodial parent(s) who is incarcerated:**

• **REQUIRED DOCUMENTS:**

- Proof of incarceration

The following are not considered unusual circumstances:

- Parents' refusal to contribute to student's education
- Parents' unwillingness to provide information on the FAFSA
- Parents' do not claim student as a dependent on taxes
- Student is self-supporting

☐ **Parents refuse to support (may be able to receive unsubsidized Stafford loans only):**

• **REQUIRED DOCUMENTS:**

- Documentation (1) that parents refuse to complete FAFSA and (2) that they do not and will not provide any financial support. Include the date support ended. If the parents refuse to sign and date a statement to this effect, the student must get documentation from a third party such as a teacher, counselor, cleric, or court.

☐ **Other special circumstance(s)**

- If your concern is not covered in any of the above options, please give a brief summary of your concern below. Your counselor will evaluate the request to determine if further action is possible. Attach a separate page if more space is needed.

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Certification Statement: I certify that the information provided on this form is complete and accurate to the best of my knowledge. If requested, I agree to submit additional proof or documentation of the information listed above.

Student Signature _____ Date _____

Parent Signature _____ Date _____

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