

Ave Maria University

2022-2023

Professional Judgment Request Form

This form is used to request a reconsideration of your 2021-22 financial aid award. Please read the circumstances below and submit this form only if you have experienced one of these named circumstances. Please include supporting documentation for review. Your application for reconsideration will be considered incomplete without ***all*** of the requested information.

LAST

FIRST

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PHONE NUMBER

student I.D.#

Eligibility for financial aid is determined by the Free Application for Federal Student Aid (FAFSA), which currently uses financial information from two years prior to estimate a household's current circumstances. Financial Aid Services recognizes that households can experience changes in income or other finances that are not reflected in their information from two years prior.

When these situations occur, it is possible to re-evaluate a student's aid eligibility based on their current circumstances through the Professional Judgement (PJ) process. **All Professional Judgement applications are required to have a detailed letter of explanation and supporting documentation.** Ave Maria University has a policy that all students going through this reconsideration of aid complete the Verification process.

Method of submission of documents

The financial aid office will not accept documents via e-mail or fax as these documents often contain personal information such as social security numbers and income information. Please use our secure method through the student [Financial Aid portal](#).

- Once in the portal go to the [Quick Links](#) on the right hand side and click the ***“Application to Upload Document”*** link.
- Upload this form along with all documents in support of your appeal.
- To complete the Verification process, go back to the welcome page and click on ***“Documents & Messages”***
- Click on the ***“Federal Verification Worksheet”*** link and complete the form.
- If prompted, upload copies of respective tax returns and/or W2's

There must be a significant change to the household finances to be considered for a Professional Judgement.

Non-applicable Circumstances

- Standard living expenses (utilities, car payments, etc)
- Mortgage payments
- Credit card/other personal debts
- Filing for bankruptcy
- Vacation expenses
- All other discretionary expenses

Types of Professional Judgement:

Change to Expected Family Contribution (EFC)

- Loss or change of employment
 - Note: A change in student's aid eligibility will likely not occur if:
 - The person who lost employment has currently been rehired and is earning a similar or higher salary than two years prior
 - The loss or change to income was not significant
- Child Support reduction or change
- Divorce/Separation of parents/spouse
- Change of marital status for dependent students
- Death of parent(s) or spouse
- Excessive out of pocket medical and/or dental expenses that exceed 11% of household's Adjusted Gross Income
- One-time taxable income (IRA disbursement, pension distribution, etc)

A change to the EFC could, but is not guaranteed to, result in a change of eligibility for need based awards.

Change to Cost of Attendance (COA)

Out of pocket costs for the following:

- Costs associated with a student's disability
- Childcare expenses for a dependent child of the student
- One-time purchase of a computer for educational use
- One-time costs of professional licensure required for student's major

A change to the COA does not result in a change for eligibility for need-based awards, only increases the room in a student's budget for aid including PLUS and private loans.

Reasons for review of financial circumstances: (***Check only the box or boxes that apply***)

A. Loss or change of employment or income

- Signed detailed statement describing changes that resulted in loss or reduction of income, **include dates and all sources of income**
- Copy of applicable tax return transcripts and/or W-2's, if applicable
- Employer letter on letterhead reflecting last date of employment or DD-214 (Member-4)
- Proof of unemployment benefits, if applicable
- Most recent paystubs showing year-to-date earnings, if applicable

B. Change in student marital status after FAFSA filing

- A signed detailed written statement describing the change in circumstances
- Copy of student's marriage certificate or divorce agreement, whichever is applicable
- Signed copies of student's and spouse's most recent Federal Tax Returns

C. Death of Parent or Spouse

- A signed detailed written statement describing the change in circumstances
- Copy of a death certificate of the deceased individual
- Copy of the final paycheck
- Documentation of any death benefits received (including but not limited to life insurance, social security, pension payouts, etc.)

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D. Excessive Medical or Dental Expenses

- A signed detailed written statement describing expenses paid out of pocket
- Copy of Schedule A, from 2019, 2020, or 2021 Federal Tax Return, if applicable
- Attach bills/receipts and an itemized list with a total of all medical and or dental expenses

E. Disability

- A signed detailed written statement describing expenses paid out of pocket
- Documentation of disability diagnosis
- Documentation of costs *paid by you and not reimbursed by anyone else* related to the student's disability (e.g. personal assistance, transportation, equipment, or supplies).

F. Reduction in Child Support or Alimony

- A signed detailed written statement describing the changes in circumstances
- Documentation of change in divorce agreement specifying alimony and/or child support (if applicable)
- Documentation of the total amount of alimony and child support for each child (cancelled checks, written agreement, civil judgment, etc.)

G. Unusual or unexpected expenses not covered by someone else

- Signed detailed statement describing unusual or unexpected expenses, **include dates**
- Copy of applicable tax return transcripts and/or W-2's, if applicable
- If one of the following apply, please check the box and provide appropriate documentation:
 - Tuition expenses for elementary, secondary education, or daycare paid within the 2021-22 award year. Please provide receipts
 - Computer expenses that were paid within the 2021-22 award year. Please provide receipts
 - Parent Attending College and paying out of pocket without reimbursements. Copy of schedule and tuition receipt, certified enrollment from Registrar's Office at the parent institution

H. Other Reduction of Income

- Signed detailed statement describing unusual or unexpected expenses, **include dates**
- Copy of applicable tax return transcripts and/or W-2's, if applicable
- Any supporting documentation that pertains to your income reduction

I. One-time Increase in Income

- Signed detailed statement describing unusual or unexpected income, **include dates**
- Copy of applicable tax return transcripts and/or W-2's, if applicable
- Any supporting documentation that pertains to your income increase Please explain how these funds were used along with proof (i.e. Pension, IRA, Capital Gain)

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Certification

I (we) certify that all the information provided is correct. I (we) understand that adjustments can be approved only in situations provided for by federal regulation and policy that have been appropriately documented. If I (we) have not provided the required documents my (our) request will be automatically denied. I (we) understand that providing false or deliberately misleading statements is a violation of federal law and may result in a prison sentence, fines, or both.

Signature of student

Date

Signature of Parent

Date

***** All requested documentation must be attached to this form or it will not be accepted. *****

For Office Use Only

Decision

Approved

Denied

Comments: _____

Reviewed by: _____

Date: _____

Reviewed by: _____

Date: _____