

FAFSA Professional Judgment Policies and Procedures

There are two different categories of Professional Judgement.

Special Circumstances refer to the financial situations (loss of a job, etc.) that justify an **FAA** (Financial Aid Administrator) adjusting data elements in the **COA** (Cost of Attendance) or in the **EFC** (Expected Family Contribution) calculation.

Unusual Circumstances refer to the conditions that justify an FAA making an adjustment to a student's dependency status based on a unique situation (e.g., human trafficking, refugee or asylee status, parental abandonment, incarceration), more commonly referred to as a *dependency override*.

A student **might** have both a Special Circumstance **and** Unusual Circumstances. FAAs are permitted to make adjustments that are appropriate to each student's situation with appropriate documentation.

In both **Special** and **Unusual Circumstances**, students and parents sometimes find the information they provided on the FAFSA does not reflect their current ability to contribute to the COA. Since the FAFSA is uses tax data from 2 years prior (called *prior-prior year*), the CITSTS FAA can in certain situations adjust elements of the FAFSA and re-calculate the EFC (*Expected Family Contribution*). Students and families with special circumstances may choose to submit a Professional Judgment (PJ) request to the Financial Aid Office asking that their situation be reviewed.

Examples of Professional Judgment reasons include, but are not limited to the following:

- The family has incurred extraordinary medical/dental expenses beyond what is claimed through a Schedule A on federal taxes.
- The student's parent has retired.

- The student or parent income has significantly reduced from the tax filing year that FAFSA is using.

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- The student or parent no longer receives untaxed benefits such as child support or other sources of income, which was previously indicated on the FAFSA application.
- The parent or student has received a one-time disbursement of funds (i.e. severance package, bonus, etc.) which were unavailable for educational expenses.
- A student may find themselves no longer able to rely on their parents for support for numerous possible reasons, which may render their dependency status *Independent*.

Professional Judgment (PJ) cases are evaluated on a case-by-case basis only, and an application for PJ does not guarantee any particular outcome.

Understand that a successful appeal does not guarantee additional aid, and sometimes additional aid is not immediately, or ever, available.

Professional Judgement Review Request

The Financial Aid Office will begin accepting requests for Professional Judgement reviews on March 1st each year for the upcoming award year. To request a Professional Judgment review in your Special or Unusual circumstance, please submit your initial request in writing to the Financial Aid Office at

financialaidadministrator@circlesquare.org

Wait for the Financial Aid Administrator to reply.

Do not attach any supporting documentation to your email.

The FAA will send you a secure link and a list of required documents to support your request. However, you should be prepared to supply: tax return transcripts, and/or tax forms from the prior year *and* the prior-prior year. Additional documentation may be requested.

Please include the student's name and social security number on all documentation.

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Initial Review Process

Once the request has been received, the Financial Aid Office will do a preliminary review to determine if the family's change in circumstances has the potential to yield a significant increase to the student's need-based financial aid. If the preliminary review does not indicate a reduction in the EFC (Expected Family Contribution) low enough to increase Federal need-based aid, the office reserves the right to deny the request for processing a Professional Judgement change. Please note: an EFC of 0 (zero) cannot be reduced - therefore students requesting PJ who already have an EFC of zero will not be accepted.

The review process can take up 4 weeks after the receipt of all supporting documentation and will conclude with the student being issued a notification via email. Professional Judgement decisions are final and cannot be appealed.

Possible decisions are:

Denied without review due to inadequate supporting materials
Denied due to an insubstantial change in the student EFC

Approved due to resulting significant change in the EFC*

* Even though approved applications are identified as having the potential to yield a significant increase to the student's financial aid, the Office of Financial Aid cannot guarantee that an increase will occur.

Also, a change in EFC due to a PJ decision will not impact the next year's EFC nor amounts of Federal Aid or Institutional Scholarships. Ensuing year's FAFSAs will determine the EFC.