

There are instances when a student's Free Application for Federal Student Aid (FAFSA) may not reflect the family's current situation. These are special circumstances that can be considered that may impact the student's financial aid eligibility. In these rare cases, a financial aid administrator may exercise professional judgment to adjust data that determines the student's Expected Family Contribution and/or Cost of Attendance components. There must be a significant change to the family's income to be considered for a Professional Judgment. **Students who already have an Expected Family Contribution (EFC) of \$0 per their FAFSA should not apply for a professional judgment as this type of change will have no impact on fund eligibility**

Professional Judgments appeals are reviewed on a case-by-case basis, and **require a letter of explanation and supporting documentation**. You must submit all required documentation in order for the Professional Judgment to be reviewed.

Student Name: _____ TXWES ID #: _____

Phone #: _____ Email: _____

STEP ONE: Required Verification Documents (if not already submitted)

If your 2023-2024 FAFSA was not selected for verification, we are required to have you complete the verification process prior to processing your professional judgment.

Dependent Students - please submit the following documents:

- 2023-2024 Dependent Verification form, completed and signed by at least one parent
- Copy of your and your parent's signed 2021 IRS Tax Returns or Tax Return Transcript

Independent Students - please submit the following documents:

- 2023-2024 Dependent Verification form, completed and signed (by spouse too if applicable)
- Copy of your (and spouse's) signed 2021 IRS Tax Returns or Tax Return Transcript

STEP TWO: Reason for Professional Judgement Request (Check all that apply)

DECREASE IN INCOME

We review decrease in income that took place for at least 12 consecutive weeks after Jan. 1, 2022, as a result of job loss, retirement, death/disability, or other wage reduction.

REQUIRED DOCUMENTS:

- Signed and dated letter on company letterhead from employer listing last date of employment, total earnings from January 1, 2022, through the last date of employment.
- Copy of last pay stub.
- Documentation of severance/benefits/unemployment compensation.
- Copy of your or your parents' (if a dependent student) signed 2022 IRS Tax Return or Tax Return Transcript and W2(s).
- Any of other supporting documentation.

DEATH OF PARENT OR SPOUSE *after the FAFSA was completed*

REQUIRED DOCUMENTS:

- Death certificate of the deceased individual.

2022-2023 Income Review Request – Continued

DIVORCE/SEPARATION

REQUIRED DOCUMENTS:

- Copy of divorce decree, or a notarized statement of separation.
- Copy of W2(s) and 2022 IRS Tax Transcript if taxes were filed jointly.

DECREASE IN ALIMONY OR CHILD SUPPORT *after the FAFSA was completed*

REQUIRED DOCUMENTS:

- 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 (canceled checks, written agreement, civil judgment, etc.)

EXCESSIVE MEDICAL OR DENTAL EXPENSES

REQUIRED DOCUMENTS:

- A signed detailed written statement describing expenses paid out of pocket
- Attach bills/receipts and an itemized list with a total of all medical and or dental expenses.
- Copy of Schedule A from 2021, or 2022 Federal Tax Return, if applicable

LUMP SUM DISTRIBUTION

Lump sum distribution or non-recurring income in 2021 has inflated your or your parents Adjusted Gross Income. In some cases, not all distributions or non-recurring income can be removed.

REQUIRED DOCUMENTS:

- Please indicate amount here \$_____.
- Attach 1099-R or statement showing amount received.
- An itemized statement detailing how this additional income was spent
- Copies of your or your parent's signed 2022 IRS Tax Return or Tax Return Transcript,

Certification and Signatures

If circumstances change, I/we accept the responsibility for contacting the Office of Financial Aid in writing with the corrected information. I/we also understand that submitting this form late in any term may eliminate potential eligibility due to processing time, awarding, and disbursement requirements. All submitted documentation becomes part of the official record and therefore cannot be returned. Documents that become part of the Education Record are protected for privacy under federal law.

I/we certify that all the information contained on this form and in the supporting documentation is complete and correct. I/we understand that I/we must complete all sections, sign, and return this form for the appeal to be processed for financial aid consideration. I/we understand that it may take 5 – 7 business days for this request to be processed.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Print this form and sign with a pen. Electronic signatures are not accepted.

Student's Signature (Required)

Date

Parent's Signature (Required)

Date

Please DO NOT submit this form until you have gathered all required documents/forms to avoid delays in processing