

2019-2020 Professional Judgment Appeal

Student Last Name

Student First Name

Goucher ID # (or last 4 of SSN)

Best Phone # for Student

Student E-Mail

Parent Name

Best Phone # for Parent

Parent E-Mail

On occasion, families experience circumstances that warrant basing their financial aid eligibility on more recent 2018 or projected 2019 income information, rather than the federally required 2017 “Prior-Prior Year” income information. This is usually due to a significant recent family event in 2018 or 2019, such as the loss of a job, loss of untaxed income or benefits, one-time increase of income, death of parent/spouse, or other extraordinary unusual expenses.

If you feel that you have extenuating circumstances not addressed on your 2019-2020 Free Application for Federal Student Aid (FAFSA), you must complete this form and submit the required documentation to request a reevaluation of your financial aid eligibility. Appeal requests, if approved, are granted on a one-time, case-by-case basis.

Situations that WILL NOT BE CONSIDERED:

- Voluntary private secondary tuition
- Car payments/insurance
- Personal bankruptcy
- Loss of home equity
- Unemployment for less than 4 months
- Reduction of business income
- Consumer debt

Instructions:

- a) Confirm that Goucher has received a 2019-2020 FAFSA, including any required documents. Current students can confirm this on the “Documents” screen in Net Partner (<http://www.goucher.edu/financial-aid/net-partner/>). New students who have not yet deposited should check their Admissions & Financial Aid Status Portal (<https://apply.goucher.edu/account>) to view their Financial Aid Checklist.
- b) Review pages 2 & 3, and indicate the situation for which you are requesting a professional judgment review.
- c) On page 3, type a clear and brief one-page explanation of your situation and sign the Statement of Understanding. (You may attach a supplemental document if additional space is needed, but please keep your explanation limited to a single page or less.)
- d) You must also submit a [2019-2020 Verification Form](#). (Undergraduate students who provide parent information should submit the Dependent verification form.)
- e) Submit this completed appeal request and **all required documents** to the Office of Student Financial Aid.
Please make only one submission, and submit this form with all documents as a single package.

Response and Turnaround Time:

Professional Judgment Appeals are frequently a committee process. **Please allow at least 3 weeks for a response.** During peak processing times (January through April), it **may take 4-6 weeks for an appeal to be reviewed** by the committee. The student and parent will be informed of the decision by e-mail to the e-mail addresses indicated above.

CHECK THE BOX BELOW THAT BEST DESCRIBES YOUR SITUATION

Unemployment/Dislocated Worker or Loss of Income after January 1, 2017

Examples include: Termination/layoff from job, significant reduction in work hours or income from work. Loss of child support or other income/benefit. *A reduction of business income, or unemployment for less than 4 months will not be considered.*

Required Documents:

- Signed and dated letter (on company letterhead) from employer listing the following: last date of employment, total earnings from January 1st of the year in question to the last date of employment.
 - Copy of last pay stub.
 - Copy of severance/benefits/unemployment eligibility, such as benefits statement or letter from unemployment office.
 - Any appropriate documentation of termination of benefits/support/income.
 - Statement of expected 2019 wages and unemployment compensation.
 - Both 2017 & 2018 IRS Tax Return Transcripts. (Order here: <http://www.irs.gov/Individuals/Get-Transcript>.) Transcripts are required even if the IRS Data Retrieval Tool was used.
 - Copies of all 2017 & 2018 parent W-2 forms (if dependent) or student & their spouse's W-2 forms (if independent).
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Unusual Medical and Dental Expenses

Examples include: Expenses incurred between January 2017 and the present that are not covered by insurance. *Unpaid bills and voluntary medical/dental procedures will not be considered.*

2017 Total: \$ _____

2018 Total: \$ _____

Required Documents:

- Itemized list of expenses clearly showing only payments specific to the total(s) indicated above. Must be accompanied by proof of out-of-pocket payment (receipts) made by student, spouse (if married), parents (if dependent).
 - Both 2017 & 2018 IRS Tax Return Transcripts. (Order here: <http://www.irs.gov/Individuals/Get-Transcript>.) Transcripts are required even if the IRS Data Retrieval Tool was used, and should be showing medical expenses on Schedule A.
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One-Time, Non-Recurring Increase of Income after January 1, 2017

Required Documents:

- Documentation of the amount and nature of the one-time non-recurring disbursement.
 - Both 2017 & 2018 IRS Tax Return Transcripts. (Order here: <http://www.irs.gov/Individuals/Get-Transcript>.) Transcripts are required even if the IRS Data Retrieval Tool was used.
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Recent Separation or Divorce of Parent or Student

Examples include: Parent (if dependent) or student (if independent) marital status changed after the 2019-2020 FAFSA was filed. *Parties in question living in the same house will not be considered.*

Required Documents:

- Copy of separation agreement, divorce decree, or substantial evidence (mortgage/lease/utility bill) proving parents (if dependent) or spouse (if independent) live in separate residences.
 - Copy of all parent W-2 forms (if dependent) or student & their spouse's W-2 forms (if independent).
 - For any year with a jointly-filed return, a [completed "Parent Tax Separation" form](#).
 - Both 2017 & 2018 IRS Tax Return Transcripts (Order here: <http://www.irs.gov/Individuals/Get-Transcript>.) Transcripts are required even if the IRS Data Retrieval Tool was used.
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Recent Death of Parent or Spouse

Examples include: Parent (if dependent) or spouse (if independent) deceased after the 2019-2020 FAFSA was filed.

Required Documents:

- Copy of death certificate.
- Copy of all parent W-2 forms (if dependent) or student & their spouse’s W-2 forms (if independent).
- For any year with a jointly-filed return, a [completed “Parent Tax Separation” form](#).
- Both 2017 & 2018 IRS Tax Return Transcripts (Order here: <http://www.irs.gov/Individuals/Get-Transcript>). Transcripts are required even if the IRS Data Retrieval Tool was used.

TYPE BELOW A CLEAR AND BRIEF EXPLANATION OF YOUR CIRCUMSTANCES

BE SURE TO LIST SPECIFIC DATES

STATEMENT OF UNDERSTANDING

- I/we certify that all of the information provided and the supporting documentation submitted is true and accurate and represents the situation as described on this form.
- I/we understand that the request will not be considered until all adequate and complete documentation is submitted. In addition, the Office of Student Financial Aid may require additional documentation in order to document and substantiate the situation.
- I/we understand that the Office of Student Financial Aid will review my request and let me know of the outcome in approximately 3 weeks.
- I/we understand that completion of this form does not guarantee additional aid, and Billing Office payment deadlines and procedures need to be adhered to during the review process in order to avoid potential late fees.

Student Signature

Date

Parent Signature (Required for students w/ Dependent status.)

Date

(ELECTRONIC SIGNATURES NOT ACCEPTED. Please print & sign in ink, then mail, fax, or scan and e-mail.)

Please make one submission, and submit this form with all required documents as a single package.