

2023-2024 INDEPENDENT PROFESSIONAL JUDGEMENT APPLICATION

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Federal School Code: 002976



**UNC
GREENSBORO**
Financial Aid
and Scholarships

Student Name: _____ Student ID: _____
Last First Middle

Professional Judgment Process Overview

This application is a request for a review of special circumstances that you feel may change your financial aid eligibility. Professional Judgment refers to the school's authority to make adjustments to the data elements reported on the Free Application for Federal Student Aid (FAFSA) so that the Department of Education can recalculate the Expected Family Contribution (EFC). The EFC is the number that the school uses to determine a student's eligibility for need based financial aid. The school does not have the authority to make direct adjustments to the EFC and can only change data elements that may change the EFC.

The UNCG Office of Financial Aid and Scholarships requires that you provide certain documents to support your claim of special circumstances. The Professional Judgment process is an extensive process that requires a thorough review by a committee of senior staff to determine what, if any, changes may be appropriate based on your application. It is a time intensive process that includes the following steps:

1. A committee will meet to determine if your Professional Judgment Application meets the basic criteria for further review.
2. If the basic eligibility requirements are met, the file will then be reviewed to determine if all required documentation has been submitted. If additional documentation is required the student will be notified via UNCG email.
3. Once we have received all of the necessary documentation we will first review the accuracy of the information initially submitted on the Free Application for Federal Student Aid (FAFSA).
4. Once we have ensured the accuracy of the initial FAFSA information, we will then evaluate the Professional Judgment Application, make appropriate changes to correct the FAFSA file, and submit those changes to The Department of Education.
5. The Department of Education will then recalculate the Expected Family Contribution (EFC) and the student's eligibility for need-based aid.

PLEASE NOTE: Even if the Professional Judgment process results in a lower Expected Family Contribution, the change may not be enough to generate eligibility for need-based financial aid or an increase in the financial aid award.

Points to Remember

- Applications based on loss of employment may not be reviewed until September 1st, 2023 to allow for a more realistic adjustment to income. **You must provide the most recent documentation relative to the September 1st date.** Documents submitted prior to September 1st may be considered out of date when the review process begins. If we have to request current information it will delay review of the file.
- Applications submitted after November 1, 2023 may (and will likely) require copies of 2023 W-2 and/or 1099 forms and may not be reviewed until a 2023 IRS Tax Return Transcript can be obtained.
- Applications submitted after March 1, 2024 must include a 2022 and a 2023 IRS Tax Return Transcript.
- **We recommend you complete your current award requirements and accept any current financial aid that you need to use to satisfy your bill.** Due to the nature of the Professional Judgment process, your request may not be completed before the payment deadline. You must pay your semester bill even if your Professional Judgment application has not been reviewed or finalized or your registration will be cancelled.
- **All documentation must be submitted within 20 business days from the date of notification** to keep the application active.

Note: The U.S. Department of Education provides in the Higher Education Amendments of 1998 a reaffirmation of the use of professional judgment in determining eligibility for federal financial aid. This provision allows for consideration of projected year income, rather than prior year income, to calculate a student's eligibility. If you and/or your spouse meet a special circumstance requirement in the 2023-2024 award year, your eligibility may be recalculated using income for 2023 or expected income for 2024.

Explanation of Special Circumstances: Detailed Statement

Provide a detailed letter of explanation regarding your current situation that you are asking us to consider. Please remember to include applicable dates and any documentation supporting your circumstance. If sufficient documentation is not provided, the Professional Judgment Application will be denied due to the application being incomplete.

Student Name: _____ Student ID: _____
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STEP 1: Explanation of Circumstances and Additional Required Documents

Complete the section below that corresponds to your circumstance. **NOTE the documentation required for each situation.**

SITUATION (Check the box for your situation)	REQUESTED DOCUMENTATION (check if included)
<input type="checkbox"/> You were employed full-time (at least 35 hours per week) for at least 30 weeks in 2023, but are not working full-time now. <input type="checkbox"/> Your spouse worked full-time (at least 35 hours per week) for at least 30 weeks in 2023 but lost employment for at least 10 consecutive weeks in 2023 and is not working full-time now. <input type="checkbox"/> You <input type="checkbox"/> Your spouse lost employment due to disability or natural disaster for more than 10 consecutive weeks in 2023. This must be a complete loss of employment. Number of weeks unemployed in 2023: _____	___ Copy of most recent (2022 or 2023) IRS Tax RETURN Transcript * ___ Employer's written notice of termination of employment ___ Copies of most recent pay stubs for all 2023 employment ___ Document unemployment benefits & amount received ___ Document all other sources of income (taxed & untaxed) In addition (as applies): ___ Attending doctor's statement of disability ___ Document date disability/disaster caused unemployment ___ Documentation of employer disability payments ___ Documentation of Worker's Compensation
<input type="checkbox"/> You <input type="checkbox"/> Your spouse had a total loss of untaxed income or benefit Benefit Lost: ___ Unemployment ___ Social Security ___ Child Support ___ Other: _____ Last date benefit was received: _____	___ Copy of most recent (2022 or 2023) IRS Tax RETURN Transcript * ___ Benefit provider's notification of loss of benefit ___ Copies of most recent pay stubs for all 2023 earnings ___ Document all other sources income (taxed & untaxed) In addition (as applies): ___ Document unemployment benefits & amount received
<input type="checkbox"/> You have already filed your FAFSA and since that time: ___ You have separated/divorced. Date: _____ ___ Your spouse has passed away. Date: _____	___ Copy of most recent (2022 or 2023) IRS Tax RETURN Transcript * ___ Copy of Marriage Certificate In addition (as applies): ___ Copy of court documented separation/divorce decree ___ Copy of spouse's death certificate or obituary
<input type="checkbox"/> Other: _____	___ Copy of most recent (2022 or 2023) IRS Tax RETURN Transcript * ___ Letter of explanation regarding your situation

How to Obtain a Tax RETURN Transcript from the IRS:

You or your spouse can immediately access a Tax Return Transcript, Wage and Income Transcripts or a Verification of Non-filing Letter. The "Verification of Non-Filing" letter provides proof from the IRS that you did not file a return for the year you have selected.

*Here is the direct link: <http://www.irs.gov/Individuals/Get-Transcript#>

STEP 2: Information Required for Review of All Special Circumstances

Complete this section to the best of your ability to predict your 2023 income.	STUDENT	SPOUSE
Expected 2023 income earned from work	\$	\$
Expected 2023 U.S. income tax to be paid	\$	\$
Expected 2023 unemployment benefits	\$	\$
Expected 2023 other taxable income and benefits	\$	\$
Expected 2023 untaxed income and benefits	\$	\$

SIGNATURE AND CERTIFICATION STATEMENT

By signing this form, I certify under penalty of perjury that the information I have reported to qualify for federal student aid is complete and accurate. I understand that purposely giving false or misleading information is a federal offense that can result in fines and/or incarceration.

I ALSO UNDERSTAND THAT:

- Additional information may be required** if this form is incomplete, if documentation is missing, unclear, or insufficient, or if additional questions arise based on the information provided.
- It can take up to two weeks** for information to be processed, and for UNCGenie to reflect changes in requirements status.

Student's Signature: _____ Date: _____

*Sign in Ink or with a Stylus

Spouse's Signature: _____ Date: _____

*Sign in Ink or with a Stylus

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