



PROFESSIONAL JUDGMENT REQUEST FORM

Name (Please Print) _____ Student's LOLA ID # _____

Email Address: _____ Phone # _____

Financial aid eligibility for the academic year is calculated based on the information you provided on the Free Application for Federal Student Aid (FAFSA). The income and asset information that you submitted was evaluated by a formula called Federal Methodology as set by Congress. This formula assumes that prior year's income is a good predictor of the family's financial strength during the student's current year enrollment. Based on this assumption, financial aid eligibility is determined using prior year's tax return information.

The Financial Aid Office at Central Louisiana Technical Community College recognizes that many families have changes in income or family situations that cannot be reflected in the tax return data. Therefore, it is possible for students to appeal their financial aid eligibility if they have unique financial circumstances. A Request for Professional Judgment may be filed if you have extenuating circumstances, which you believe warrant a reevaluation of your financial aid.

How to Request IRS Transcripts

All Requests for Professional Judgment require Tax Return Transcripts for student/spouse and parent (if student is dependent) along with W-2's and/or 1099's used to complete the tax return. You may obtain a tax return transcript by going online to www.irs.gov or you can call the IRS at 1-800-908-9946 and follow the prompts to request a Tax Transcript for the prior two (2) years.

Please allow 2-3 weeks processing time from the time all documentation has been submitted. Notification of the decision by the Financial Aid Office will be sent to your e-mail address. All decisions made by the Financial Aid Office concerning special circumstances are final. If you have questions, please contact the financial aid specialist at your campus. **Please ensure that student's LOLA ID and name is on ALL submitted documents.**

REQUEST FOR PROFESSIONAL JUDGMENT INSTRUCTIONS

<i>Circumstances may include, but are not limited to:</i>	<i>Circumstances that are NOT considered as extenuating include, but are not limited to:</i>
<ul style="list-style-type: none"> ▪ Loss or change of employment ▪ Loss or change in amount of child support, Social Security, or other benefits ▪ Divorce or separation of parents or spouse ▪ Death of parent(s) or spouse ▪ Unusual medical expenses (not covered by insurance) ▪ One-time taxable income used for life changing events (e.g. IRA, pension distribution, back-year Social Security payments) ▪ Student's parent has retired 	<ul style="list-style-type: none"> ▪ Standard living expenses (e.g. utilities, credit card payments, children's allowances, etc.) ▪ Mortgage payments ▪ Car payments ▪ Credit card or other personal debts ▪ Vacation expenses ▪ All other discretionary expenses

Submit all of the following (from Items 1-4) to have your request reviewed by the financial aid office and choose only one option:

1. This completed and signed form;
2. **A letter from the student and parent (if dependent)** describing the situation and the reason for the request;
3. A copy of last year's IRS transcript and all W2s & 1099 for student/spouse and parent (if a dependent student)
4. Select only **ONE** of the below options and check reason in #4 and provide **ALL** required documentation.

OPTION 1: Initial Here

I understand by choosing Option 1 to use the previous tax year, I cannot request later to re-evaluate my aid using Option 2, and that any changes are permanent for this year.

- All previous year's tax transcripts from IRS. **Independent students** need to request student and spouse, if married and **Dependent students:** student and parent(s)/step-parent listed on the FAFSA
- All previous year's 1099's Schedules and/or W2's for **Independent students** need to request student and spouse, if married and **Dependent students:** student and parent(s)/step-parent listed on the FAFSA.

OPTION 2: Initial Here

I understand by choosing Option 2 to use the current tax year, I cannot request later to re-evaluate my aid using Option 1, and that any changes are permanent for this year.
(Cannot be submitted until after July 1 of each year)

- Letter from employer that states separation date or change
- Copy of all latest check stubs - Dependent students: students and parent(s)/step-parent / Independent students- student and spouse
- Below current year Projected income (total income earned/to be earned from January to December of the current calendar year)

Check one of the boxes below and provide the additional documents accordingly:

<u>ADDITIONAL DOCUMENTS NEEDED FOR THE FOLLOWING REQUEST</u>	
<i>Check Reason and Provide documentation</i>	<i>Documentation Required</i>
<input type="checkbox"/> Loss or change in employment	<ul style="list-style-type: none"> • Letter from former employer(s) stating the last date of employment • Copy of unemployment compensation letter or signed statement that you did not or will not receive unemployment benefits, copy of DD214 if appeal is due to discharge from active military duty
<input type="checkbox"/> Loss or change in amount of child support, social security or other benefits	<ul style="list-style-type: none"> • If benefit is terminated, provide documentation of monthly benefit amount and date of benefit termination. If benefits are reduced, provide documentation of original amount, date of reduction and reduced amount.
<input type="checkbox"/> Divorce or separation of parents or spouse	<ul style="list-style-type: none"> • Legal signed Petition for Divorce document, proof of separate households, or divorce decree
<input type="checkbox"/> Death of parent(s) or spouse	<ul style="list-style-type: none"> • Copy of death certificate
<input type="checkbox"/> Unusual medical expenses	<ul style="list-style-type: none"> • Submit of proof of payment of medical bills.
<input type="checkbox"/> One-time taxable income (e.g. IRA, Pension distribution, Social Security payments)	<ul style="list-style-type: none"> • Documentation to identify the source of the income • Proof of payment and an itemized statement showing how the funds were spent (e.g. cancelled checks, receipts, bank statements)
<input type="checkbox"/> Student or Parent has retired	<ul style="list-style-type: none"> • Documentation of monthly income sources for all retirement income, including social security (if applicable)

