



## Office of Student Financial Aid

(504) 520-7835 or FAX (504) 520-7906

### 2021 – 2022 PROFESSIONAL JUDGMENT (PJ) FORM

If your financial situation has changed and you feel the income information on your FAFSA no longer accurately reflects your family’s current income, you may consider submitting documents to be reviewed for a professional judgment.

**Priority deadline date to submit is June 1, 2021 to ensure you receive a response prior to fee payment date. Final deadline date to submit a PJ request is September 30. (Please send all documents to your financial aid counselor).**

- If you are selected for verification, it must be completed.
- Along with this PJ form, you should include all of the valid required documents at the time of submission.  
*Note: The Financial Aid Office reserves the right to request additional documentation.*
- After evaluating and processing your documents, the results may not change your federal financial aid offer.

<b>Student Name</b> _____	<b>XULA ID</b> _____
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Check the reason for this request as indicated from the items listed below.

<u>Reasons for P.J Request</u>	<u>Required Documents</u>
<p><input type="checkbox"/> <b>Decrease in Income/Loss of Income (Injury, full time to part time employment, layoff, termination, quit job, left job to return to school)</b></p> <p><i>Note: Please ensure your letter and documentation provide the total amount of income that is no longer available to you due to the income reduction.</i></p>	<p><input type="checkbox"/> Signed letter from student/parent explaining the situation and requesting an income adjustment review.</p> <p><input type="checkbox"/> Signed Letter of termination/end of employment from the employer with the date your employment ceased.</p> <p><input type="checkbox"/> Official Letter of Unemployment Benefits</p> <p><input type="checkbox"/> <b>I used the IRS Data Retrieval on the 21-22 FAFSA. All 2019 income and tax information is accurate.</b></p> <p><input type="checkbox"/> <b>I did <u>not</u> use the IRS Data Retrieval. You should attach a “signed” copy of your 2019 and 2020 IRS Federal Tax Return for parent as well as the student, if applicable. *Attach 2018, only if you believe it is needed for support.</b></p> <p><input type="checkbox"/> Attach W2s, 1099s, only if you believe it will support your PJ.</p> <p><input type="checkbox"/> Include <i>ALL</i> of your federal tax Schedules (Schedule 1, 2, 3), if applicable.</p> <p><input type="checkbox"/> If you were <u>not</u> required to file taxes, in accordance with the IRS guidelines, attach a <u>signed</u> statement indicating “I did not file taxes and was not required to file taxes based on IRS guidelines.” <input type="checkbox"/> Attach all W-2s, 1099s, if applicable.</p> <p><input type="checkbox"/> If loss in 2021, include last 3 months check stubs of person who lost his/her job.</p> <p><input type="checkbox"/> Other</p>
<p><input type="checkbox"/> <b>Death of Spouse or Parent (Consideration to remove that person’s income)</b></p> <p><i>Note: You should include in your letter and the supporting documentation the total amount of income which has been loss due to the spouse/parent’s death.</i></p>	<p><input type="checkbox"/> Signed letter from parent/student explaining the situation including <i>date</i> of occurrence with the <i>name(s)</i> of the deceased parent(s).</p> <p><input type="checkbox"/> Copy of official death certificate.</p> <p><input type="checkbox"/> <b>I used the IRS Data Retrieval on the 21-22 FAFSA. All 2019 income and tax information is accurate for both parents.</b></p> <p><input type="checkbox"/> <b>*I did not use the IRS DRT. You should attached a Signed copy of 2019 IRS Federal Tax Return for parent and if applicable the student.</b></p> <p><input type="checkbox"/> Supporting documents if death happened in 2020: Signed 2020 Tax Return and 2020 W2s and 1099’s.</p> <p><input type="checkbox"/> Supporting documents if death happened in 2021: Signed 2020 tax return W2s and 1099’s and if available, check stubs for last 3 months income prior to death from employer.</p> <p><input type="checkbox"/> Other</p>

<p><input type="checkbox"/> <b>Divorce or Separation</b></p> <p><i>Your letter must clearly state the name of the <u>custodial parent</u> as defined by the Department of Education. It should also include the <u>total amount of income</u> that is no longer available to you as a result of this incident.</i></p> <p><i>The status must meet all of the IRS and state guidelines. For assistance, refer to the <u>Department of Education Website</u>.</i></p>	<p><input type="checkbox"/> Signed letter from student/parent explaining the situation which includes the specific date of the incident and a note that says, "I ____" am the custodial parent.</p> <p><input type="checkbox"/> Copy of divorce decree or legal separation documents as defined by IRS and state guidelines.</p> <p><input type="checkbox"/> <b>I did not use the IRS Data Retrieval on the 21-22 FAFSA.</b> Attached is the signed 2019 <u>and</u> 2020 Tax Returns.</p> <p><input type="checkbox"/> If <b>NOT</b> legally divorced or legally separated the following documentation must be turned in <u>along with</u> a letter from a knowledgeable third party (i.e. clergy, counselor, social worker, etc.)</p> <ul style="list-style-type: none"> <li>• If available two separate letters, one from each spouse, stating month, date and year they were separated. If not, a letter from custodial parent.</li> <li>• Last three months of current utility bills and official mortgage/lease from <u>each</u> spouse showing different addresses. *If leasing from an individual, the letter must be attested."</li> </ul>
<p><input type="checkbox"/> <b>Out of Pocket Medical Expenses</b></p> <p><i>This situation is only considered if your out-of-pocket medical expenses paid exceed the <u>11%</u> income protection allowance (IPA), which is already included in the EFC calculation on the FAFSA. Your documents should clearly demonstrate the amount covered by your insurance and amount you paid.</i></p>	<p><input type="checkbox"/> Signed letter from student/parent explaining the situation and the total amount of out of pocket expenses.</p> <p><input type="checkbox"/> <b>*Signed</b> copy of Federal Tax Return for the year you had out of pocket medical expenses for student/parent. Include the Schedule with this info.</p> <p><input type="checkbox"/> Copy of receipts with <u>an</u> itemized list with total out-of- pocket medical expenses paid indicated on <u>each</u> bill as well as the <u>sum total</u>.</p> <p><input type="checkbox"/> Proof of payment (cancelled check, card pay, etc.)</p>
<p><input type="checkbox"/> <b>Elementary/Secondary Tuition Expenses for student's sibling(s)</b></p> <p><i>This situation is only considered IF the annual elementary or secondary school tuition exceeds 10% of the family's adjusted gross income.</i></p>	<p><input type="checkbox"/> Signed letter from parent/student with details of name of siblings, ages, relationships, name and address of school and year attended. Letter should indicate if any of the tuition payments were reimbursed.</p> <p><input type="checkbox"/> <b>**Signed</b> copy of 2019 IRS Federal Tax Return (student/parent). If you used the IRS DRT, you do not have to submit.</p> <p><input type="checkbox"/> Copy of <u>annual</u> tuition bill and proof of payments for the 2019-2020 or 2020- 2021 school year (statement of payments must be official school record or/ letterhead with school's official signature.)</p>
<p><input type="checkbox"/> <b>Parent(s) attending college.</b> Parent(s) must be enrolled at least half-time during the 2021-2022 academic year and working toward a degree.</p>	<p><input type="checkbox"/> Enrollment Verification from school's Registrar's Office. Documentation of Enrollment Status</p> <p><input type="checkbox"/> Documentation of Required Book and Supply Costs (syllabus)</p> <p><input type="checkbox"/> Documentation of need for program.</p> <p><input type="checkbox"/> Proof of Tuition payments from school.</p> <p><input type="checkbox"/> Statement identifying unreimbursed educational costs</p>
<p><input type="checkbox"/> <b>Retirement</b></p>	<p><input type="checkbox"/> Signed letter from student/parent explaining details such as date and reason.</p> <p><input type="checkbox"/> Letter of separation from Employer</p> <p><input type="checkbox"/> Copy of Official Retirement Income</p> <p><input type="checkbox"/> Proof and source of any additional income or signed statement for retiree</p> <p><input type="checkbox"/> Source of income for <i>other parent</i>, if applicable, 2019 &amp; 2020 Tax Return and all W-2s, 1099s and current income as well as a signed statement separating total earned income by parent. If IRS DRT was used, you do not need to submit.</p>

*\*\*If your unusual circumstance has taken place in 2021-22, please contact your Financial Aid Counselor for guidance.*

**CERTIFICATION:** By signing below I certify that all of the information reported is complete and accurate. I understand that falsifying information/ documentation can result in being fined, sentenced to jail or both. I understand that additional documents may be requested. I understand that submission does not guarantee approval. I understand the decision is final and the federal government does not allow appeal of the decision. I understand the normal turnaround time is 14 to 21 business days.

Student Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent Signature \_\_\_\_\_

Date \_\_\_\_\_