

2022-2023

Professional Judgment Appeal Form



Student Name _____

Student ID# _____

Elizabethtown College recognizes that standard financial aid forms do not always capture the full financial profile of our students and their families. Through the use of Professional Judgment, the Financial Aid Office may be able to make adjustments to your FAFSA which could result in a recalculation of aid eligibility at Elizabethtown College. All Professional Judgment cases are subject to a review and are not guaranteed to result in any additional financial aid. Please note that Professional Judgment requests will be processed with the understanding that it is the responsibility of the student to utilize all federal financial aid sources made available to them.

Please review the options below and check all circumstances that apply and submit all required documents. If you have questions do not hesitate to contact our office at finaid@etown.edu or (717) 361-1404.

Major medical expenses incurred between January 2020 and the present that were not covered by insurance and were paid for out of pocket

• **DO NOT** include payments for health insurance premiums. Expenses must be above 11% of AGI. The medical expense must be out of pocket expenses in which you did not receive a tax credit on your Tax Return.

• **REQUIRED DOCUMENTS:**

- Itemized list of medical expenses not covered by insurance and paid out of pocket
- 2020 or 2021 Tax Transcript and Schedule A
- Proof of payment

Tuition payments made for dependent children attending private school in kindergarten through 12th grade

• **REQUIRED DOCUMENTS:**

- Please provide proof of payment
- Age(s) of dependent children: _____
- Name(s) of dependent children: _____

Parent in college at least half-time in a degree-seeking program

• **REQUIRED DOCUMENTS:**

- Proof of enrollment for the 2022-2023 academic year
- Proof of tuition payment for the 2022-2023 academic year
- Financial aid award letter and/or copy of tuition benefit policy

Child Support received ended

• **REQUIRED DOCUMENTS:**

- If you indicated an amount of child support received in 2020 on the FAFSA, and this support ended after 2020, please indicate the date this occurred: _____

Lump sum distribution or non-recurring income in 2020 has inflated your Adjusted Gross Income

• Please note that in some cases, not all distributions or non-recurring income can be removed under Professional Judgment. Your counselor will evaluate your request to determine if Professional Judgment can be exercised. Please also note that in most cases, students are only able to apply for this option once during the student's tenure at Elizabethtown.

• **REQUIRED DOCUMENTS:**

- Please indicate amount here \$ _____
- Copies of your 2020 IRS Tax Return Transcript
- An itemized statement detailing how this additional income was spent
- 2020 Form 1099-R (if applicable)

Divorce or Separation

• **REQUIRED DOCUMENTS:**

- Copy of separation, divorce decree or copy of mortgage/lease proving separate residences
- Copy of 2020 W-2(s) and 2020 Tax Transcript

Rollover

• **REQUIRED DOCUMENTS:**

- Signed statement with the rollover amount
- Notation on the tax transcript that includes the word "rollover" beside any applicable item (annotation must be signed and dated by the filer)

Decrease in Parent(s) and/or Student's Income after January 1, 2021 as a result of job loss, retirement, death/disability, or other wage reduction. The reduction in income must have been for at least six months.

2021 Income

2022 Expected Income

	STUDENT	PARENT 1	PARENT 2
Expected Earned From Work	\$	\$	\$
Other Income (Unemployment, Workman's Comp, etc.)	\$	\$	\$
Total Expected Income	\$	\$	\$

• **REQUIRED DOCUMENTS:**

- Signed and dated letter on company letterhead from employer listing last date of employment, total earnings from January 1, 2021 through last date of employment
- Copy of last pay stub.
- Documentation of severance/benefits/unemployment compensation
- Copy of your 2020 and/or 2021 IRS Tax Return Transcript and W-2(s)
- Employer offer letter if reemployed in 2022
- All supporting documentation

Other special or unusual circumstance(s)

- If your concern is not covered in any of the above options, please give a brief summary of your concern below. Your counselor will evaluate the request to determine if further action is possible. Attach a separate page if more space is needed.

Certification Statement: I certify that the information provided on this form is complete and accurate to the best of my knowledge. If requested, I agree to submit additional proof or documentation of the information listed above.

Student Signature _____ Date _____

Parent Signature _____ Date _____

Please return this signed form, along with all required supplemental documentation, to the Elizabethtown College Financial Aid Office. You may return it via our [Secured Documents Upload](#) system (call for username and password) or U.S. mail.

Financial Aid Office
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Elizabethtown, PA 17022
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