

2024-2025 PROFESSIONAL JUDGEMENT APPLICATION

Office of Scholarships & Financial Aid
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Federal School Code: 002986



WINSTON-SALEM
STATE UNIVERSITY

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 adjust 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 U.S. Department of Education and 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 WSSU Office of Scholarships and Financial Aid 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. 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 WSSU email.
2. Once we have received all the necessary documentation, we will first review the accuracy of the information initially submitted on the Free Application for Federal Student Aid (FAFSA).
3. 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.
4. 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

- **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.**
- Applications based on recent loss of employment may not be submitted until September 1st, 2024, 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 must request current information, it will delay review of the file.
- Applications submitted after December 1, 2024, may (and will likely) require copies of 2024 W-2 and/or 1099 forms and may not be reviewed until a 2024 IRS Tax Return Transcript can be obtained.
- Applications submitted after March 1, 2025, must include a 2023 IRS Tax Return Transcript and all 2024 W2s. If available, must also include a signed copy of the 2024 IRS Tax Return.
- **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 your parents meet a special circumstance requirement in the 2024-2025 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.

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)	DOCUMENTATION REQUIRED (based on the situation selected)
<input type="checkbox"/> You had a total loss of full-time employment _____ Check here if the loss of employment was due to disability or federally designated natural disaster Name of person unemployed: _____ Their relationship to student: _____ Number of weeks parent unemployed to date: _____ For unemployment do not submit application until after Sept. 1, 2024 (see "Points to Remember" on page 1)	_____ Copy of most recent (2023 or 2024) IRS Tax RETURN Transcript * (required) _____ Employer's written notice of termination of employment (required) _____ Copies of most recent pay stubs for all 2024 employment (required) _____ Document unemployment benefits & amount received (if applicable) _____ Document all other sources of income (taxed & untaxed) (required) In addition (as applies): _____ Attending doctor's statement of disability (if applicable) _____ Document date disability/disaster caused unemployment. (if applicable) _____ Documentation of employer disability payments (if applicable) _____ Documentation of Worker's Compensation (if applicable)
<input type="checkbox"/> You 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 (2023 or 2024) IRS Tax RETURN Transcript * (required) _____ Benefit provider's notification of loss of benefit (required) _____ Copies of most recent pay stubs for all 2024 earnings (required) _____ Document all other sources income (taxed & untaxed) (required) In addition (as applies): _____ Document unemployment benefits & amount received (if applicable)
<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 (2023 or 2024) IRS Tax RETURN Transcript * (required) In addition (as applies): _____ Copy of court-documented separation/divorce decree (required) _____ Copy of spouse death certificate or obituary (required)
<input type="checkbox"/> Other: _____	_____ Copy of most recent (2023 or 2024) IRS Tax RETURN Transcript * (required) _____ Letter of explanation regarding your situation (required)

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 2024 income.	Student	Spouse
Expected 2024 income earned from work	\$	\$
Expected 2024 U.S. income tax to be paid	\$	\$
Expected 2024 unemployment benefits	\$	\$
Expected 2024 other taxable income and benefits	\$	\$
Expected 2024 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 three weeks** for information to be processed, and for your Banner Rams Portal to reflect changes in requirements status.

Student's Signature: _____ Date: _____
 *Sign in Ink or with a Stylus

Spouse Signature: _____ Date: _____
 *Sign in Ink or with a Stylus

