

UMBC

Office of Financial Aid and Scholarships
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2009-10 PROFESSIONAL JUDGMENT APPEAL REQUEST FORM

STUDENT NAME: _____

CAMPUS ID: _____ **DATE:** _____

Sometimes families experience special circumstances which merit recalculating their financial aid eligibility based on their projected annual 2009 income rather than the federally required 2008 income. Professional judgment appeal requests are reviewed only after the student has submitted all necessary primary information. All Professional Judgment Appeal Request forms will be selected for verification of 2008 data before 2009 adjustments can be considered. Please be advised that professional judgment appeal requests, if approved, are granted on a one-time, case-by-case basis. All professional judgment appeal decisions are final. Approved appeals may not necessarily qualify the student to receive additional financial aid. **2009 income changes will not be accepted until 7/1/2009 or later (income must be documented for a minimum 6 month period).** The appeal committee also reserves the right to request your tax return for 2009 after the appeal has been approved. The appeal decision will be emailed to the student.

INSTRUCTIONS:

- Identify the situation(s) for which you are requesting a professional judgment review. (See page 2)
- Attach a **typed**, clear, concise, signed and dated, one-page explanation of your circumstances.
- Attach required documentation of your circumstances as listed on attached form. **Upon review of your appeal, the Office of Financial Aid and Scholarships may request additional documentation.**
- Complete the 2009-2010 Verification Worksheet which can be found on our web site www.umbc.edu/financialaid/forms and attach signed 2008 federal tax forms for student and spouse (if independent) and parent(s) (if dependent) **with all 2008 W-2's and all Schedules.**
- Return all requested documents to the UMBC Office of Financial Aid and Scholarships.

APPEALS SUBMITTED WITHOUT ABOVE REQUIRED DOCUMENTATION WILL NOT BE PROCESSED

I understand that intentionally providing false statements or misrepresentations will result in cancellation of my request. I understand that if my appeal is approved, the recalculation of my eligibility does not guarantee receipt of additional aid.

Student's signature Date

Mother's signature Date

Spouse's signature Date

Father's signature Date

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1. _____ **Minimum 20% reduction of 2009 income**

2009 income changes will not be accepted until 7/1/2009 or later - income must be documented for a minimum 6 month period. If you are self-employed, earn commission or overtime pay, you cannot submit an appeal until December 2009.

Reasons for consideration include: Termination/layoff from job, significant reduction in work hours, retirement or return to school full-time.

Documentation may include: Signed and dated letter from employer on company letterhead listing the following: last date of employment, total earnings from January 1, 2009 through date of unemployment, documentation of severance/benefits/unemployment compensation, copy of most recent pay stub from all employers, documentation of retirement income

2. _____ **Unique medical expenses totaling more than 20% of income**

Reasons for consideration include: Medical expenses paid, not just incurred in 2008 and were not covered by Health/Dental insurance.

Documentation may include: proof of payment (receipts/cancelled checks) made by student, spouse (if married), parents (if dependent). Invoices are not sufficient documentation. You must submit proof that the medical expense was paid in 2008.

3. _____ **Loss of untaxed income of at least 20%**

Reasons for consideration include: Loss of Social Security, AFDC/TANF, child support, other untaxed income or disability.

Documentation may include: Documentation of termination of benefits from benefit provider. Examples include Social Security Administration, Department of Social Services, divorce decree, court order, etc.

4. _____ **Separation or Divorce of: parent or spouse during the 2009 calendar year**

Reasons for consideration include: Parent (if dependent) or spouse (if independent) no longer residing in household due to separation or divorce.

Documentation may include: All W-2's must be submitted to verify separation of income. Copy of separation agreement, divorce decree, or substantial evidence (copy of mortgage/lease, utility bills, etc.) proving parent (if dependent) or spouse (if independent) is residing in separate residence. Parties in question living in same dwelling will not be considered.

5. _____ **Death of: parent or spouse during the 2009 calendar year**

Reasons for consideration include: Parent (if dependent) or spouse (if independent) deceased after student filed 2009-2010 FAFSA.

Documentation may include: Copy of death certificate and documentation of death benefits.

6. _____ **Elementary/Secondary educational tuition expenses**

Reasons for consideration include: Necessary private school tuition expenses paid due to a learning impairment or health/medical condition. Attendance must be continual throughout 2009-2010.

Documentation may include: Doctor/Health care professional's statement verifying attendance is required along with copies of cancelled checks/receipts of payment in 2008.

7. _____ **Parent of Dependent Student Also Attending College**

Reasons for consideration include: Parent of UMBC student is degree seeking at a post-secondary institution. Parent must be enrolled at least ½ time (usually 6 credits) in a degree seeking program and have been counted in the 2009-2010 FAFSA household size.

Documentation may include: Official class schedule (copy) from parent's educational institution.

UPDATED: 11/16/09