



Professional Judgment Appeal for 2008-2009

OFFICE OF FINANCIAL AID

PLEASE READ before completing other side:

What's a Professional Judgment appeal?

Professional Judgment is our ability to change a student's financial aid based on your documented special circumstances. These circumstances may include a decrease in income, change in family size, loss of assets, unusual expenses, etc. Examples of possible circumstances are listed on the reverse side of this appeal form; the list is not all inclusive since you may have a situation that is not categorized.

Your eligibility for financial aid was originally calculated based on the information you provided on the *Free Application for Federal Student Aid* (FAFSA). The income and asset information you submitted was evaluated using a formula established by Congress. The formula assumes that 2007 income, assets and family size are good predictors of the family's financial strength during the student's 2008-2009 enrollment. Based on this assumption, financial aid eligibility is determined using 2007 income information.

The Office of Financial Aid at CU-Boulder recognizes that many families experience changes in income, assets or family situations that are not reflected in the 2007 tax return data. Therefore, it is possible for students to appeal their financial aid offer if they have special financial circumstances. **All appeals require that parents (if the student included parental information on the FAFSA) submit a signed copy of their 2007 federal income tax return** to the Office of Financial Aid if they have not already done so.

In order for us to process an appeal, you need to be eligible for financial aid and officially admitted into the university. In addition, you need to be currently enrolled for the academic year or semester for which you are appealing.

How to start an appeal:

You can initiate a Professional Judgment appeals by completing the reverse side of this form and submitting it to our office at the address or FAX number listed below. Once your appeal is received and the situation has been documented, the Professional Judgment team will review it and notify you of the result.

The changes made by the Professional Judgment team may or may not increase a student's financial aid. Since funding is limited, it is important to submit your appeal as early as possible. **The review process may take as long as eight weeks.**

You will be reconsidered for federal, state and university funds. Depending upon fund availability, this may include the Federal Pell Grant, Federal Supplemental Educational Opportunity Grant, Federal Perkins Loan, Federal College Work-Study, Federal Direct Student Loan Programs, State grants, CU-Boulder grants and scholarships, etc.

Required Documentation

In order for us to make changes to a student's financial aid, you **must** submit documentation of your special circumstances. Typical documentation may include, but is not limited to, the following:

Decrease in income: one of our Estimated Income Forms completed by you, copies of year-to-date pay stubs, federal tax returns, a termination notice from employer, notice from Social Security regarding termination of benefits, copy of severance document.

Medical expenses: one of our medical expense forms completed by you, with copies of Explanation of Benefit (EOB) statements, receipts, pay stubs to show health/dental insurance premiums, letter(s) from doctor(s) indicating cost of future care, etc.

Maintenance of two households: Letter outlining why two households must be maintained, copies of lease agreements, mortgage notes and utility bills for each of the two residences.

Divorce or Separation: Copy of court documents showing separation or divorce, documentation of living in two separate residences (utility bills, leases, etc.).

Parent in College: Parent should complete our "Parent Enrollment Verification Form" available from the Office of Financial Aid.

Purchases of a Computer: Up to \$2500 can be added to the student's budget every three years for the costs of a computer, printer, software and/or other peripherals. The student should complete the "2008-2009 Cost of Attendance Adjustment for Computer Purchase" form. The form can be requested from the Office of Financial Aid.

Once we have received all appeal documentation requested, it may take us up to 2-4 weeks to process the appeal.

All Appeals And Documentation Must Be Submitted By April 1, 2009.

RETURN THIS FORM TO:
University of Colorado at Boulder
Office of Financial Aid
Professional Judgment Team
77 UCB
Boulder, CO 80309-0077
(303) 492-5091

FAX: (303) 492-0838, Attn: PJ

Please include student's name and student identification number on each page of the FAX.

Colorado
University of Colorado at Boulder

*SLTR

G:\COUNSEL\PJ\Docs 08\SLTR 07-08.doc

Professional Judgment Appeal

08/09

OFFICE OF FINANCIAL AID

Student Name (Last, First, M.I.). *Please Print*

Student Identification Number

Street Address/P.O. Box

City

State

Zip Code

Local Phone

➤ **Appeal Letter:** Write a detailed description of your special circumstance(s) and attach it to this form. Explain each of the circumstances you check below. If your statement is unclear, incomplete or illegible your appeal can not be processed. Please make sure your name and student identification number are clearly marked on the top of all documents.

➤ **Circumstances affecting your financial situation – check each that applies:**

Adjustments to EFC (Expected Family Contribution) - for Parents, Student, Student's Spouse -	Adjustments to Student Budget - for Student only -
<input type="checkbox"/> Decrease in student/spouse income since 2007	<input type="checkbox"/> Tuition Paid to ACCESS/Continuing Education
<input type="checkbox"/> Significant decrease in parent income since 2007	<input type="checkbox"/> Course Fees Assessed
<input type="checkbox"/> Loss of Social Security Benefits	<input type="checkbox"/> Rent/utilities exceed \$610 per month
<input type="checkbox"/> Nursing home expenses paid by family	<input type="checkbox"/> Books/supplies exceed \$1749 for the AY*
<input type="checkbox"/> Unusual medical expenses for family members	<input type="checkbox"/> Student medical costs exceed \$1845 for AY*
<input type="checkbox"/> Payments to IRS for back taxes prior to 2007	<input type="checkbox"/> Day care expenses over \$832/month per child
<input type="checkbox"/> Divorce or separation from spouse	<input type="checkbox"/> Handicapped student expenses
<input type="checkbox"/> Required educational loan payments	<input type="checkbox"/> Purchase of computer during the AY*
<input type="checkbox"/> Parent in college	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Other:	*AY = Academic Year: August 25, 2008-May 7, 2009

➤ **Certification of Understanding:** The information I submit in support of this appeal is true and complete to the best of my knowledge. I agree to give proof of all appeal information, which may include but is not limited to copies of federal income tax returns, court documents, real estate information, termination notices, year-to-date pay stubs, estimates for computer purchase, etc. Failure to comply could result in cancellation of financial aid disbursements, fines, and/or criminal action. I understand that approval of this request does not assure approval of a similar future request, and that any financial assistance offered is limited by the availability of funds in any given year.

I understand that the information I provided in past appeals may be reviewed for accuracy and this can impact the outcome of this appeal. Further, the accuracy of the information I submit in this appeal can affect the outcome of any future appeals I may submit.

Student Signature

Date

Spouse Signature

Date

Parent Signature (REQUIRED for Dependent Students) Date

Parent Signature (for Dependent Students) Date

All Appeals and Documentation Must Be Submitted By April 1, 2009.