



Professional Judgment/Special Circumstances Appeal Required Documentation, 2024-2025

for students who filed the 2024-2025 FAFSA and are registered in either of these terms, Summer 2024 through Spring 2025

Special Circumstance	Required Documentation for Parent/Student/Spouse
Income Change ●●● Job Loss/Unemployment — must be minimal income reduction of at least 20% gross income. Must have earned money during 2022 and lost his/her job, and been unemployed. Significant Income Decline - must be a minimal income reduction of at least 20% of gross income. Parents/Students/Spouses must have earned money in 2022 and experienced a significant decrease in income due to disability, natural disaster, change in employment, or other catastrophic events.	• Statement for person(s) who lost job; include: ○ Person(s)' name and relationship to you and layoff/termination date; ○ Whether the person has started another job and, if so, the date hired ○ 2022 Federal Income Tax Return ○ Pay stub prior to the income loss or change ○ Pay stub after the income loss or change • Letter from former employer(s)/Human Resources, on company letterhead, detailing the employee's termination date or income change, the reason for the change, and specifying the number of payments or benefits that were/will be received due to the separation (or income decline); and, • Online printout of unemployment benefits (should include start and end dates, gross weekly amount, and total amount of benefits) and, • Proof of severance pay received, 401K, IRA, stocks/bonds, pensions, or other assets converted to cash.
Loss of Benefits	• Letter from appropriate state or federal agency or other legal documentation specifying the total amount of benefits or support received and termination date. If child support and/or alimony, a copy of the divorce decree to include the settlement agreement • 2023 year-to-date earnings (i.e., most recent check stubs, W-2(s) or IRS Wage and Income Transcript) • Retirement pay statement for 2023 (if applicable)
Divorce/Separation - Student and/or parent is divorced or separated after filing the FAFSA.	• Statement that includes the following: ○ Date of separation/divorce (mm/dd/yy) List the members of your household that physically reside with you or for which you provide over 50% of their support, AND list the age next to each ○ List the members of your household listed above who will attend college more than half-time between July 1, 2024 and June 30, 2025 • A court-stamped copy of the divorce decree, legal court separation paperwork, or proof of separate residences by providing the following: ○ Mortgage statements OR Rental/lease agreement ○ Utility bills ○ Government agency benefit statements ○ 2023 year-to-date earnings (i.e., most recent check stubs, W-2(s) or IRS Wage and Income Transcript) • Submit proof of spousal and/or child support received in 2023.

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Professional Judgment/Special Circumstances Appeal

Required Documentation, 2024-2025 *(continued)*

*for students who filed the 2024-2025 FAFSA and are registered in either of these terms,
Summer 2024 through Spring 2025*

One-Time Income Change - Student/Spouse/Parent received a one-time income payout.	- Documentation of one-time income, including amount, type of income, and date received - Statement of how funds were spent, invested, or rolled over - Financial/Bank Statements 2023 year-to-date earnings (i.e., most recent check stubs, W-2(s) or IRS Wage and Income Transcript)
Unusual Medical or Dental Expenses - You must be able to document that your household paid at least 10% of their total income in medical or dental expenses from personal resources during 2023 (i.e., not paid by insurance or flex spending account).	- Copies of paid medical/dental receipts, Explanation of Benefits (EOB) for 2023 2023 year-to-date earnings (i.e., most recent check stubs, W-2(s) or IRS Wage and Income Transcript) - If medically necessary and cosmetic, a written statement from a doctor confirming the necessity. Do not report payments covered by insurance or payments from business or Flex Spending accounts. Only report those expenses that qualify for itemization on a personal Federal Tax Return. However, we will not count expenses that are claimed as a tax benefit. Medical/dental expenses may not be cosmetic in nature unless prescribed by a doctor and needed expressly for medical reasons.
Other Catastrophic Events during 2023 (Not covered already with your request)	- Statement explaining the situation along with supporting evidence; and - Official reports, invoices, and receipts of expenses paid by the family not covered by insurance; and - Copy of the statement(s) from the insurance company of any paid or denied claims.
Death - Spouse and/or Parent died after filing the FAFSA.	- Copy of certified death certificate or obituary 2023 year-to-date earnings (i.e., most recent check stubs, W-2(s) or IRS Wage and Income Transcript)
Loss of Child Support - received during 2022 & 2023	- Statement that includes date Child support ended (mm/dd/yy) - Submit proof of the amount of child support received in 2022 and 2023 (copy of divorce decree, canceled checks, etc.) - Submit a legal document declaring the date the child support ended
Lump Sum/ One Time Payment of retirement funds/ ROTH IRA Conversion - received during 2022	- Submit documentation explaining the circumstance behind the payment or conversion - Submit documentation showing the amount(s) removed/converted and the amounts available as resources

Next Steps:

- If you choose to submit an appeal after reviewing the special circumstances listed above, please review the required documentation and submit ALL with your appeal.
- You must have a completed FAFSA on file AND, if selected, have completed verification before starting a special circumstances (PJ) appeal.
 - If you have completed the verification process while at NLU, you only need to log in with your student portal username and password (you do not need to create a new account).
 - Please create an account here (<https://nl.verifymyfafsa.com/>) to start your PJ Appeal.
- We will email your NLU email address if we need anything else as we review your appeal so, please check it frequently for updates.