



Rec'd by: \_\_\_\_\_  
Date: \_\_\_\_\_

FAO Action: \_\_\_\_\_  
By: \_\_\_\_\_  
Date: \_\_\_\_\_

### The University of Mississippi

Office of Financial Aid (Professional Judgment Review Committee)  
257 Martindale Center  
P.O. Box 1848  
University, MS 38677-1848

Phone: 1-800-891-4596  
Fax: (662) 915-1164  
Email: [finaid@olemiss.edu](mailto:finaid@olemiss.edu)

## Adjustment to Expected Family Contribution 2017-18

You may complete this professional judgment request if your, your spouse's, or your parents' (*for dependent students*) financial, marital, or family situation has changed or differs significantly from the information you originally provided on your 2017-18 Free Application for Federal Student Aid (FAFSA), which was based on 2015 tax and income information, but current household and asset information.

Our office will review the information from this form, required supporting documentation you provide (see below), and information from your FAFSA application to determine if we can make any adjustments to your Expected Family Contribution (EFC), which may assist you in receiving increased eligibility for need-based federal financial aid. **Please note: submitting this form in and of itself, does not guarantee that your request will be approved, or that you will qualify for additional aid. Whether you receive additional financial aid will depend on your new eligibility status and the availability of funds.**

#### REQUIRED SUPPORTING DOCUMENTATION (must be submitted with this form):

- **Personal Statement:** Please attach a personal statement, written, signed, and dated statement that explains your special circumstances. Also list ALL income currently received by your household. Be sure to include all pertinent information and dates of events.

- **2015 IRS Tax Return or 2015 Tax Return Transcript:**

Because the IRS Data Retrieval Tool may not have been available for use when submitting the 2017-18 FAFSA, you may provide signed copies of the 2015 federal income tax return (completed IRS 1040, 1040A, or 1040EZ form) or the 2015 IRS Tax Return Transcript.

To request a transcript, contact the IRS at 1-800-908-9946 or visit <https://www.irs.gov/>, click on "Get My Tax Record" bar on the IRS homepage. From there select "Get Transcript Online" to receive an electronic version of the transcript, or "Get Transcript by Mail" to receive a copy by mail. Transcripts requested by phone or by the online mail request, are generally received within 10 business days.

- **Copies of 2015 W-2 forms, tax schedules, and/or other income documents (such as benefits statements).**

NOTE: If copies of the tax return, tax return transcript, W-2 form(s), tax schedules, or other income documents were provided for the FAFSA verification process, do not submit them again. Was this type of documentation submitted for the verification process?  Yes  No

- **Other documentation** supporting your request.

To be completed by student (please print):

\_\_\_\_\_  
STUDENT LAST NAME

\_\_\_\_\_  
STUDENT FIRST NAME

\_\_\_\_\_  
STUDENT MIDDLE NAME

\_\_\_\_\_  
OLE MISS STUDENT NUMBER

\_\_\_\_\_  
LOCAL TELEPHONE NUMBER

\_\_\_\_\_  
OLE MISS EMAIL ADDRESS @go.olemiss.edu

If a dependent student:

\_\_\_\_\_  
PARENT CONTACT NAME

\_\_\_\_\_  
PARENT PHONE NUMBER

\_\_\_\_\_  
PARENT EMAIL ADDRESS

Please check the appropriate box indicating your student status:

Undergraduate/Pharmacy (EE 1-3/PY1)  Graduate/ Law/ Pharmacy (PY2-PY4)

Check the appropriate reason(s) for your request below.

\_\_\_\_\_ 1) **A CHANGE IN THE FAMILY SITUATION OCCURRED DUE TO THE DEATH OF A SPOUSE OR PARENT.**

Please provide a copy of the spouse's or parent's death certificate.

\_\_\_\_\_ 2) **THERE ARE LOSSES OF INCOME OR BENEFITS.**

Please indicate if you, your spouse, or your parents (*for dependent students*) are now earning less than what is reported on your 2017-18 FAFSA, or if there are benefits that have been reduced or suspended.

\_\_\_ **A. Loss of income from work:** There must be at least 3 months of lost income.

Attach documentation from your employer stating the effective date of separation from work or pay change and confirming the amount of reduced wages if applicable. PLEASE NOTE: we cannot use any documentation that reflects *future* events (i.e., anticipated date of resignation or separation from job) – the event must have already happened.

Was a severance package provided? **Yes** or **No**  
(If so, provide severance agreement.)

Is unemployment being received? **Yes** or **No**  
(If so, attach statement of benefits.)

Is disability being received? **Yes** or **No**  
(If so, attach documentation of benefits.)

Please be aware that unless the income loss is permanent in nature (e.g., retirement, or quitting work to return to school full-time), processing a request of this type is somewhat premature until 2016 tax information is available. In most cases we will request **both** the 2015 and 2016 tax documents. In some cases, we may also wait until the 2017 tax return is filed and use 2017 tax/income data as the financial snapshot when re-evaluating eligibility for the 2018-19 academic year.

\_\_\_ **B. Loss of benefits** (e.g., Social Security, Veterans' benefits, retirement income, child support, or unemployment).

Provide notification of benefit termination or reduction, stating effective date and new monthly amounts if applicable.

Specify type of benefit affected: \_\_\_\_\_

\_\_\_\_\_ 3) **A CHANGE IN MARITAL STATUS OCCURRED SINCE THE INITIAL APPLICATION FOR FINANCIAL AID WAS PROCESSED.**

\_\_\_\_\_ If this involves the separation or divorce of a **dependent student's** parents, please submit a copy of the Divorce Decree or documentation to verify that a separation has occurred. Also provide confirmation of who will be the student's *custodial* parent during the academic year.

\_\_\_\_\_ If this involves the separation or divorce of an **independent student**, please submit a copy of the Divorce Decree or documentation to verify that a separation has occurred.

\_\_\_\_\_ If this involves a **dependent student** marrying *after* the initial FAFSA was filed, please provide a copy of the marriage license, and appropriate tax documentation for *both* student and spouse (additional documentation may be requested before FAFSA corrections are made).

\_\_\_\_\_ 4) **EXTRAORDINARY MEDICAL/DENTAL EXPENSES HAVE BEEN PAID.**

To adjust for medical/dental expenses, you must document whether you have **paid, out-of-pocket expenses** beyond the set amount for medical/dental care that is already figured into the federal EFC formula. **Unpaid bills, estimates, or amounts strictly covered by insurance will not be considered.** Please provide:

The **IRS Tax Return** that matches the calendar year when the medical expenses were incurred, and a copy of the **federal tax Schedule A** for that year's return.

OR

For the appropriate calendar year when the medical expenses were incurred, a **signed statement from your medical/dental provider** (which must include the name, address, and contact information of the medical/dental provider), or documentation that details:

- Original medical/dental expenses, patient's name, and dates of service
- Amount paid (or to be paid) by insurance—including any other adjusted amounts off the balance due
- Amount actually paid by the individual for any medical services rendered

\_\_\_\_\_ 5) **A SIGNIFICANT AMOUNT OF ONE-TIME INCOME WAS REPORTED ON THE 2015 FEDERAL INCOME TAX RETURN THAT WILL NOT BE RECURRING.**

Specify type of income reported (i.e., one-time early withdrawal from IRA Account):  
\_\_\_\_\_

Please provide an explanation and documentation of these funds. Be aware that one-time funds that are not treated as recurring income will be counted, in most cases, as asset information on the FAFSA (i.e., an increase to cash/savings/checking data). This is because the FAFSA formula assumes that part of these funds, when considered as income, should be used for the student's education. However, considering them as asset information, instead of recurring income, often benefits the student when it comes to financial aid eligibility.

\_\_\_\_\_6) **TUITION FOR PRIVATE SCHOOL (K-12) for 2017-18.**

To adjust for private school tuition, you must document **out-of-pocket expenses** for 2017-18 and provide an itemized paid receipt from the school or signed school contract showing tuition less any scholarships or discounts applied to the account (**anticipated/estimated charges or expenses will not be considered**).

\_\_\_\_\_7) **THERE ARE OTHER UNUSUAL OR SPECIAL CIRCUMSTANCES.**

If you do not meet one of the conditions above, provide a detailed explanation in your Personal Statement and attach documentation of how your financial status has changed. Please know that the federal formula does not allow us to take discretionary spending or outstanding debts into account – so things including, but not limited to, bankruptcy, large credit card balances, or the costs of a second home cannot be the basis for a change in the student’s calculated financial need.

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**CERTIFICATION STATEMENT**  
*(Please read carefully before signing.)*

*By signing below, we affirm that all information contained in or attached to this request for an adjustment to the Expected Family Contribution (including any attached personal statements and/or other documentation) is true and correct to the best of our knowledge, and the information is complete and accurate. We agree to provide additional information or documentation if requested. We understand that if we are found to have knowingly or intentionally given false or fraudulent statements and/or documentation, this request will be denied, any eligibility for federal and state student aid may be suspended or canceled, and any false or fraudulent information may be reported to the U. S. Department of Education’s Office of the Inspector General.*

\_\_\_\_\_  
Student’s Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent or Spouse’s Signature

\_\_\_\_\_  
Date

***Requests are processed as quickly as possible, but may take several weeks during peak periods (June through October).***