

Session 17 - Adjustments and Professional Judgment

By the end of this session, you will be able to:

- *adjust a student's COA and EFC and*
- *exercise professional judgment for sample students.*

RESOURCES

- *The 1997-98 Federal Student Financial Aid Handbook, Chapter 2*
- *Action Letter #6 (GEN-95-54)*

SESSION CONTENTS

1. Need to Know

- ◆ Lecture notes
- ◆ "School Use Only" box of Part 2 of SAR
- ◆ Sample Use of Professional Judgment — "Sally Augustine"

2. Practice

- ◆ Case Study 1 — Request for Dependency Override
- ◆ Case Study 2 — Request for Dependency Override
- ◆ Case Study 3 — Request for Adjustment to EFC
- ◆ Case Study 4 — Request for Adjustment to Student's Cost of Attendance (Budget)

SESSION CONTENTS (cont'd)

- ◆ Case Study 5 — Request for Adjustment to EFC

3. Back at the Office

NEED TO KNOW

Professional Judgment Principles

- used only for unusual circumstances;
- applied on a case-by-case basis; and
- carefully documented in the student's file.

School Use Only

The following box appears at the bottom of Part 2 of the Student Aid Report:

NEED TO KNOW (cont'd)

Sally Augustine - A Sample Use of Professional Judgment

Sally's Adjusted Packaging Worksheet

NEED TO KNOW (cont'd)

Sally's COA or EFC Adjustment

NEED TO KNOW (cont'd)

Sally's Checks

NEED TO KNOW (cont'd)

Letter from Wegotcha

PRACTICE

Case Study 1 — Request for Dependency Override

Jane Smith, 20 years old, lives with her grandparents and has done so for the past five years, since her parents divorced. She does not know where her father is, but her mother has remarried and cannot work due to a disability. Jane has supported herself with part-time jobs and with some support from her grandparents. Jane would like to be considered independent.

1. What action would you take?

2. What factors were considered in reaching your decision?

3. What documentation would you request?

PRACTICE (cont'd)

Case Study 2 — Request for Dependency Override

Joyce Lane is 19 years old with one child. She has come to you to request that you make her an independent student. Joyce has a part-time job and is living with her parents. Both her parents teach in the public school system. Also, her parents provide most of Joyce's child's financial support.

1. What action would you take?

2. What factors were considered in reaching your decision?

3. What documentation would you request?

PRACTICE (cont'd)

Case Study 3 — Request for Adjustment to EFC

John Williams is one of three children and the only one attending college. Both his parents are employed and John was denied financial aid because his EFC was too high. John's father has lost his job.

1. What action would you take?

2. What factors were considered in reaching your decision?

3. What documentation would you request?

PRACTICE (cont'd)

Case Study 4 — Request for Adjustment to Student's Cost of Attendance (Budget)

Lois Johnson is a full-time, third-year medical student and the mother of a nine-month old. Students enrolled in the third year of medical school are required to be on-call in the hospital for 36 hours straight. Lois needs child care during her normal work and school hours and also during this extended on-call time. The amount normally allotted to students with dependent children for child-care costs is insufficient in Lois's case. The student is requesting that her budget be adjusted to cover the additional cost in child care.

1. What action would you take?

2. What factors were considered in reaching your decision?

3. What documentation would you request?

PRACTICE (cont'd)

Case Study 5 — Request for Adjustment to EFC

Susan James is 18 years old and the mother of two small children. They all live with her parents. She receives \$400 a month in child support from the father of her children. During the mid-part of the award year, Susan advises her financial aid officer that the father of her children is now incarcerated and the support is no longer available.

1. What action would you take?

2. What things were considered in reaching your decision?

3. What documentation would you request?

BACK AT THE OFFICE

Back at the office, you should:

- Become familiar with or develop your own school policy for dealing with unusual circumstances and making professional judgments.
- _____
- _____
- _____