



## Professional Judgement (PJ) Policy - Direct Loan/Federal Aid

### 1. What is Professional Judgement?

Professional Judgement is the process of reviewing an individual student's unique circumstances and exercising the option to change the data elements normally applied through the Free Application for Federal Student Aid (FAFSA) application that helps calculate the federal aid package.

When there are unusual or special circumstances that impact your federal student aid eligibility, federal regulations allow you to request an adjustment based on your circumstances and give a Financial Aid Administrator (FAA) discretion or professional judgement on a case-by-case basis and with adequate documentation to make adjustments to: 1) data elements on your FAFSA form that impact the SAI, 2) your Cost of Attendance, 3) your dependency status.

The Department of Education does not have the authority to override a school's professional judgement decision.

#### Special circumstances

The FAA may use PJ on a case by case basis to adjust the student's cost of attendance or the data used to calculate the SAI. The FSA handbook gives examples of special circumstances the **may** be considered:

- Change in employment status, income, or assets
- Change in housing status (e.g. homelessness)
- Medical, dental, or nursing home expenses not covered by insurance
- Child or dependent care expenses
- Severe disability of the student or other member of the student's household

#### Unusual circumstances

The FAA may use a circumstance which affects a student's dependency status in order to do a dependency override.

For circumstances related to independent status, you are also able to indicate this on your FAFSA form, for example: if you are homeless, at risk of homelessness, or that unusual circumstances prevent you from contacting your parents. By adding this to your FAFSA, this will indicate to the FAA that you are "provisionally independent". Once in receipt of this

information, the FAA will review your circumstances to determine whether they are able to make a dependency override.

Any adjustment made under this policy is only valid at the school making the change.

## 2. What do I do if I would like to be considered for a PJ?

If you have circumstances in which you would like to be considered for PJ as special or unusual, please email the Student Financial Support Team ([sfsu@york.ac.uk](mailto:sfsu@york.ac.uk)) at the University of York. The Financial Aid Administrator (FAA) will consider your special or unusual circumstances before making a professional judgement.

## 3. How does the Professional Judgement process work?

Once you have contacted Student Financial Support, or, if you are considered “provisionally independent” via your FAFSA, you will receive an email from the Student Financial Support Team notifying you of the next steps and actions required in order for the University of York to make a professional judgement. Once all of the necessary documentation (which may include legal documents, rental agreements, bills and written statements) has been received, the FAA will review your circumstances and evidence, make a professional judgement and you will be notified of the outcome by email to your University of York email account.

Determinations are made as soon as practicable after reviewing the requested evidence and will usually be completed within 2 weeks, however during busy periods, this may take longer.

## 4. How do we manage your data?

Documentation supporting the judgement will be stored for at least 3 years after your final term. This documentation will be held securely electronically on Student financial Support's online cloud. Access to this cloud is restricted to members of Student Financial Support.

See more about our [consumer disclosure information](#) and how we manage your data.

## 5. Who makes Professional Judgement decisions?

Professional judgement decisions are made by the Financial Aid Administrator in the Student Financial Support team at the University of York and authorised by the Student Administration Manager.

## 6. How can you appeal a decision?

If you believe your request has not been assessed correctly in line with the published guidelines and you would like it reviewed, in the first instance, please email [sfsu@york.ac.uk](mailto:sfsu@york.ac.uk) with your reason for requesting this and one of the team will review your case. You will receive an outcome within 2 weeks, however during busy periods, this may take longer.

## 7. Contact

For enquiries about this document or US Federal Aid, please contact:

**Student Financial Support**

University of York

[sfsu@york.ac.uk](mailto:sfsu@york.ac.uk)

(Office Hours: Monday to Friday, 10am - 4pm)