

7.2 Professional Judgment

The Higher Education federal statutes grant authority to the Financial Aid Officer to exercise discretion in a number of areas. (Higher Education Act, Section 479(A)(a.) Students who have special, documented circumstances may receive special consideration on a case-by-case basis. Changes in student eligibility made in this manner are called "adjustments" rather than "corrections" or "recalculations".

7.2.1 Areas of Discretion

7.2.1.1 Dependency Status

In rare cases, a student who is "dependent" may be considered "independent." (Cases would include extremely adverse home conditions or other highly unusual events.) Students cannot claim independence simply by proving they are self-supporting. The FAO cannot change an "independent" student to a "dependent"; however, the FAO can include contributions from the parents as part of the resources of an "independent" student.

7.2.1.2 Resources

In rare cases, the FAO may adjust the expected EFC by changing data provided by the student for one or more data elements used in the EFC formula, but may not alter the formula itself. Such cases might include a loss of employment (student, spouse, parent), loss of benefits (student, spouse, parent), deduction of a one-time payment (student, spouse, parent), death of a spouse or parent, or other circumstance outside of the student, spouse, and/or parent's control. Typically, an adjustment is made only in circumstances when the updated information results in a significant change in eligibility that benefits the student. For 2017-18 special circumstances, students must use earnings and other income received during the 2017 calendar year as replacement of 2015 tax income used on the FAFSA.

7.2.1.3 Budgets

Expenses may be added to or subtracted from the student budget to more accurately reflect the actual costs of the individual student. Such adjustments, for example, might include a budget addition for equipment associated with a disability or a budget deletion if the student is fully supported by someone other than a parent. Adjustments may be allowed only for items which are not already accounted for within the EFC formula (e.g. certain protections are built in to the EFC formula for health care costs and living expenses).

7.2.1.4 Satisfactory Academic Progress

As stated in Section 7.1.4, discretion will be exercised to review extenuating circumstances that might affect a student's academic performance or progress.

7.2.2 Procedures for Exercising Professional Judgment

In all cases, without exception, the actions taken must be described in writing in the student record. (This could be on a petition copy, a comment sheet or an anecdotal comment in Colleague.) Additionally, the description must clearly state the reason(s) for the discretionary action, clearly summarizing the unique circumstances that warranted the action. Finally, there must be adequate documentation to prove the unique circumstance(s) as related to

eligibility. The Verification Guide can be used as a general guide for acceptable documentation standards.

7.2.3 Reporting Adjustments

Certain adjustments (dependency change, EFC change which affects Pell eligibility) must be reported to the central processor on the SAR. Other changes (budget, satisfactory progress, EFC changes not affecting Pell) only need to be reflected internally at WCC.