LINCOLN UNIVERSITY

Dependency Status Appeal

Lincoln University
of Missouri
Department of Student
Financial Aid
820 Chestnut Street,
103 Young Hall
Jefferson City, MO 65101
Phone: (573) 681-6156

Questions Answered

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1. What is a dependency override?

A dependency override occurs when a financial aid administrator overrides the Department of Education's criteria for dependent students. These overrides may only be granted on a case-by-case basis for students with unusual circumstances. The unusual circumstances must show reason for a student to be considered independent rather than dependent.

2. What makes a student dependent or independent?

For financial aid purposes, federal regulations have defined an independent student as one who meets at least one of the following conditions:

- Were you born before Jan. 1, 1989?
- Are you married? (Answer "Yes" if you are separated but not divorced.)
- At the beginning of the 2012–13 school year, will you be working on a master's or doctorate degree (such as an M.A., M.B.A., M.D., J.D., Ph.D., Ed.D., graduate certificate, etc.)?
- Are you currently serving on active duty in the U.S. armed forces for purposes other than training? If you are a National Guard or Reserves enlistee, are you on active duty for other than state or training purposes?
- Are you a veteran of the U.S. armed forces?
- Do you have children who will receive more than half of their support from you between July 1, 2012, and June 30, 2013?
- Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2013?
- At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?
- Has it been decided by a court in your state of legal residence that you are an emancipated minor or that you are in a legal guardianship?
- At any time on or after July 1, 2011, were you determined to be an unaccompanied youth who was homeless, as determined by (a) your high school or district homeless liaison or (b) the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development?
- At any time on or after July 1, 2011, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?

If a student does not meet one of these criteria, you are deemed a dependent student based on the criteria used for federal financial aid eligibility, and you must provide parental information on the FAFSA (Free Application for Federal Student Aid).

3. What conditions don't merit a dependency override?

None of the conditions below, separately or in combination, qualify as unusual circumstances or merit a dependency override:

- Parents do not claim the student as a dependent for income tax purposes
- Parents refuse to contribute to a student's education
- Student demonstrates self-sufficiency
- A student who does not wish to communicate with parents
- A student who has been previously considered independent for the purpose of receiving financial aid, but does not meet the current definition as outlined in the 2012-2013 FAFSA.

4. What is needed for the application process?

- Completed Dependency Status Appeal form (next page).
- A detailed letter explaining the circumstances as to why you are applying for the dependency override.
  - * Be sure to include information explaining your relationship with both your mother and father.
- At least three letters from professional witnesses documenting the circumstances as to why you are applying for the dependency override.
  - * Witnesses must be familiar with your family circumstances and the circumstances as to why you are applying for the dependency override.
  - * Examples of professional witnesses include teachers, counselors, physicians, lawyers, and law enforcement officers.
- Any additional documentation to document the events discussed in your written explanation.
  - * Examples of necessary additional documentation include police reports, hospital reports, and court documents.
- Signed copy of 2011 federal taxes and schedules
- 2011 W-2s

5. What happens next?

* If granted:

The student's file will be processed as an independent student. Verification also must be completed before the student is awarded.

* If not granted:

The student must submit parents' information. This includes a 2012-2013 verification worksheet with parents' household information listed, parents' 2011 federal taxes, parents' 2011 W-2s, a signed 2012-2013 ISIR (Institutional Student Information Record) by student and parent as well as any additional documentation needed to complete verification.

6. Checklist

Verify that you have completed the items below. This will help decrease the number of times the Department of Student Financial Aid contacts you before being able to complete the dependency override.

Dependency Status Appeal

_____ A detailed explanation is attached.
_____ Letters from witnesses are attached.
_____ The form is completed and signed.

Taxes and W-2s

____ Taxes are signed.
____ Tax schedules attached.
____ W-2s add up to wages on taxes.

Additional documentation

____ I have reviewed front side of request for dependency override and all necessary documentation is attached.

PLEASE RETURN THIS FORM AND ALL REQUESTED DOCUMENTATION TO:

Lincoln University
Department of Student Financial Aid
820 Chestnut Street, 103 Young Hall
Jefferson City, MO 65101

2012-2013 Dependency Status Appeal

7. Student Information

Student's Name: _____ S.S.#: _____

Address: _____ ID#: _____

City/State/Zip: _____ Phone: _____

Parents have the primary responsibility to pay for their son or daughter's educational expenses. However, if there is an unintentional, involuntary or uncontrollable break in the relationship between parent(s) and student, Lincoln University may be able to consider the student independent for financial aid purposes. **A student being self-supportive and living on own <u>is not considered</u> to be a reason to grant a dependency status change.** To consider this appeal Lincoln University will need a detailed, written explanation and supporting documentation.

ALL DOCUMENTATION MUST BE SUBMITTED BEFORE YOUR REQUEST WILL BE REVIEWED

If one of the following circumstances applies to you, please check the category and provide the required documentation:

☐ **Your custodial parent has died and the other natural parent is still living.** You have neither had contact with nor received any financial support from the living parent for a significant length of time (more than 2 years).

<u>Required Documentation</u>

1. A copy of the death certificate of the deceased custodial parent.
2. Documentation of the custodial relationship (for example, a **court** document, a copy of the divorce decree or other evidence the deceased was the custodial parent), and
3. Three (3) letters, on official letterhead, from objective third parties **(i.e. minister, social worker, counselor, teacher, doctor or other professional) which supports your claim that you neither lived with nor received financial support from the non-custodial parent for a significant length of time (more than 2 years).**

☐ **You are a political refugee or eligible non-citizen, your parents do not reside in the United States and are unable to provide financial support.**

<u>Required Documentation</u>

1. Immigration and Naturalization Service (INS) documents verifying your status **(i.e., I-94 Departure Record, Employment Authorization Card I-551 or I-151 Permanent Resident Card, etc.)**, and
2. Other evidence to confirm your parents are living outside the United States and are unable to provide financial support.

☐ **Your family situation is unreasonable.** The dysfunction may be the result of physical abuse, emotional abuse or drug or alcohol abuse. In some cases, a professional may have counseled you to live apart from your parent(s).

Required Documentation

1. Three (3) letters (on official letterhead) from a minister, social worker, psychologist, high school counselor, teacher, doctor, or other professional, explaining the situation in detail.

2. A letter from you, the student, explaining the situation in detail, and one or more of the following:
   - A letter from an independent third party (non-relative or friend) (example: parents of a friend, neighbor, employer)
   - Police reports
   - Court reports
   - Documentation from a social agency

☐ **Other Unusual Circumstances**

Required Documentation

1. A detailed, written explanation and supporting documentation of unusual circumstances.

8. Student Certification

I certify all information on this appeal, and the attached documentation, is complete and accurate.

_____ _____

Student's Signature Date

OFFICE USE ONLY

_____ Approved _____ Denied

Comments:

_____

_____

_____

_____

Date: _____ FAO Signature: _____