

# 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

## 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:

- \* Born before January 1, 1987
- \* Orphan or ward of the court until age 18
- \* Graduate student in 2010-2011
- \* Veteran of U.S. Armed Forces
- \* Married as of date FAFSA was signed
- \* Has legal dependents

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 refuse to provide information on the application or for verification
- ◆ 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 2010-2011 FAFSA.

### Questions Answered

What is a dependency override?	1
What makes a student dependent or independent?	2
What conditions don't merit	3
What is needed for the	4
What happens next?	5
Checklist	6
Student Information	7
Student Certification	8

### Other Alternatives:

Dependency overrides affect federal financial aid eligibility. A student is not required to submit parental information for alternative loans. Students may feel free to apply for any non-federal loans if they do not want to use parental information.

#### 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 2009 federal taxes and schedules
- 2009 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 2010-2011 verification worksheet with parents' household information listed, parents' 2009 federal taxes, parents' 2009 W-2s, a signed 2010-2011 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.

<b>Dependency Status Appeal</b>	<b>Taxes and W-2s</b>	<b>Additional documentation</b>
<input type="checkbox"/> A detailed explanation is attached.	<input type="checkbox"/> Taxes are signed.	<input type="checkbox"/> I have reviewed front side of
<input type="checkbox"/> Letters from witnesses are attached.	<input type="checkbox"/> Tax schedules attached.	request for dependency
<input type="checkbox"/> The form is completed and signed.	<input type="checkbox"/> W-2s add up to wages on taxes.	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

## 2010-2011 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 is not considered 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).

#### Required Documentation

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.**

#### Required Documentation

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.

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**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: \_\_\_\_\_