



2020-2021 Dependency Override Appeal

Federal financial aid regulations assume that a student's family has primary responsibility for meeting educational costs. If you are considered a dependent student according to the federal financial aid definition, your aid eligibility is determined by using parent income and asset information in addition to your information.

What Makes a Student Independent?

Your student dependency status is determined by the U.S. Department of Education based on your responses to specific questions on the FAFSA. 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, 1997;
- Married as of the date FAFSA signed;
- Have children who received **more than half their support** from the student, OR has legal dependents, other than a spouse or children, who live with student and who receive **more than half their support** from the student;
- Attending Graduate level program of study during the 2020-2021 academic year;
- Veteran of U.S. Armed Forces (or will be a veteran as of June 30, 2020), or have attended a service academy and were released under a condition other than dishonorable;
- Currently serving on active duty in U.S. Armed Forces (other than for training);
- Emancipated Minor or in Legal Guardianship as determined by the court in her/his state of legal residence;
- Orphan, Ward of Court, Foster Care (after age 13);
- A self-supporting unaccompanied youth who is homeless or at risk of homelessness (as certified by governmental or school agency).

A student who does not meet **ANY** of the above conditions is classified as a Dependent student.

What is a Dependency Override?

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

What conditions **COULD** warrant a Dependency Override?

The following are some examples of conditions that could warrant a dependency override:

- Documented Abandonment
- Physical or emotional abuse
- Parental drug abuse
- Severe estrangement from parents
- Parental mental incapacity
- Parental Incarceration

What conditions DO NOT warrant a Dependency Override?

By Federal Law, the following conditions DO NOT warrant a dependency override:

- Parents refuse to provide information on the FAFSA application or for verification
- Parents do not claim student as a dependent for income tax purposes
- Parents unwilling or unable to contribute to student's education
- Student demonstrates self-sufficiency
- Student reluctant to request the income information from parent's
- Student does not wish to communicate with parents

Financial Aid Policy at University of Charleston requires a student seeking a dependency override to complete the University of Charleston Dependency Override Appeal. Decisions made at other institutions are not accepted.

2020-2021 Dependency Override Appeal: Instructions

You should complete this form if you are considered a dependent student for federal financial aid and believe you have compelling extenuating circumstances which should allow you to be considered an independent student.

Return the completed form with the required documentation to the Office of Financial Aid. ***We understand the sensitive nature of these circumstances; all documentation received by our office will be kept confidential.***

Please note the following:

- Complete the 2020-2021 Free Application for Federal Student Aid (FAFSA) online at www.fafsa.ed.gov **prior** to completing and submitting the Dependency Override Appeal.
- Financial Aid policy at University of Charleston requires a student seeking a dependency override to complete the University of Charleston Dependency Override Appeal. **Decisions made at other institutions are not accepted.**
- When submitting your appeal, **you will be required to meet with a financial aid staff member.**
- The determination of whether to approve a dependency override is made by the Office of Financial Aid at University of Charleston-not by the U.S. Department of Education. All decisions made by the Office of Financial Aid on dependency overrides are **FINAL** and not appealable.

Dependency Override Appeal Process:

1. **Free Application for Federal Student Aid (FAFSA):**

Complete the FAFSA online at www.fafsa.ed.gov prior to submitting the Dependency Override Appeal.

2. **Dependency Override Appeal Form:**

Complete all sections of the appeal form.

3. **Third-Party Statements:**

Provide at least two letters from third-party adult individuals who personally have knowledge of your situation and who can verify your circumstances. **At least one letter (on letterhead) must be from a guidance counselor, physician, social worker, clergy person, or another individual who has been involved in the circumstances in a professional capacity.** All letters must include details as to how the person knows you, how long they have known you, and how they have been involved and/or have first-hand knowledge of your situation.

The individuals submitting letters cannot be related to one another, nor can they reside at the same address. A telephone number and address where the individual can be reached for follow up questions must be included.

4. Supporting Documentation:

In addition to your appeal form and third-party statements, you must provide the following document with your appeal:

- Copy of your current lease or rental agreement. If you do not have either, attach a signed statement from your current landlord verifying your tenancy.

5. Meet with a member of Financial Aid staff:

Once you have completed the appeal form and gathered your statements and supporting documentation, contact University of Charleston's Office of Financial Aid.

After Filing the Dependency Override Appeal:

If your appeal is approved: We will notify you via email, and will submit the override to the Central Processing System. Your financial aid will then be packaged based on independent status. PLEASE NOTE: Additional documents may be required after the CPS has processed the revision to your dependency status.

If your appeal is not approved: We will notify you via email of our decision. In order to receive a financial aid package, you must provide parent financial information and signature on your FAFSA, using the FAFSA website (www.fafsa.ed.gov)

All decisions on dependency overrides are made based on Professional Judgment by the Office of Financial Aid at University of Charleston. All decisions are FINAL.



2020-2021 Dependency Override Appeal

Name: _____ ID NUMBER _____

Phone (____) _____ EMAIL _____

Financial Aid policy at University of Charleston requires a student seeking a dependency override to complete and submit the University of Charleston Dependency Override Appeal form and all listed documentation to the University of Charleston Office of Financial Aid. Decisions made at other institutions are not accepted. You may refer to the instructions page for complete details.

1: Personal Statement

Personal Statement: In the space below, provide a detailed explanation of the unusual & extenuating circumstances that you believe warrant a review of your dependency status. Attach additional pages if necessary. Be sure to include the following:

1. The nature of your relationship with both your mother **AND** your father
2. The location of both parents **AND** when you last had contact with them
3. Why you cannot obtain information and/or support from your parents

2: 3rd PARTY/ PROFESSIONAL STATEMENT

Provide at least two letters from 3rd party adult individuals who personally have knowledge of your situation and who can verify your circumstances. Please note the following:

1. At least one letter (on letterhead) must be from a guidance counselor, physician, social worker, licensed therapist, clergy person, or other individual who has been involved in the circumstances in a professional capacity.
2. All letters must include details as to how the person knows you, how long they have known you, and how they have been involved and/or have first-hand personal knowledge of your situation.
3. The individuals submitting letters cannot be related to one another, nor can they reside at the same address. A telephone number and address where the individual can be reached for follow up questions must be included.

3: RESIDENCE INFORMATION

Check the appropriate box below:

Where did you live in 2019-2020? On Campus Off Campus With Parents

Where will you live in 2020-2021? On Campus Off Campus With Parents

4: EXPENSES (Pt. 1): For each item listed below, place an X in the appropriate box.

Did your parent(s) claim you as an exemption on their 2018 federal tax return? Yes No

Will/did your parent(s) claim you as a dependent on their 2018 federal tax return? Yes No

Did your parent(s) provide your health insurance in 2019-2020? Yes No

Will your parent(s) provide your health insurance in 2020-2021? Yes No

Did your parent(s) provide your auto insurance in 2019-2020? Yes No

Will your parent(s) provide your auto insurance in 2020-2021? Yes No

5: EXPENSES (Pt. 2): Indicate who pays for each expense listed in the chart below

Expense	Resource (who pays for the expense)

6: PRIOR YEAR FINANCIAL AID SUPPORT

Did you receive financial aid during the 2019-2020 year (Fall 2019, Spring 2020, or Summer 2020)?

If you answered "Yes," list the institution(s) you attended during the 2019-2020 Academic year:

Name of Institution(s)

7: STUDENT CERTIFICATION

I certify that the information provided on this form and all attached documents is true, complete, and accurate. I understand that purposefully providing false information could result in a reduction and/or repayment of aid, and/or denial of future appeals in this and future years.

Student Signature _____ Date _____

Return your completed form to:

Mail: University of Charleston- Office of Financial Aid
2300 MacCorkle Ave SE, Charleston, WV 25302

Phone: 304.357.4944

Fax: 304.352-0011

Email: ucfinancialaid@ucwv.edu