

INSTRUCTIONS FOR FILING A REQUEST TO CHANGE DEPENDENCY STATUS

2008 – 2009

Students who do not meet the criteria described on the back of this page and believe that they should be considered independent due to **unusual** circumstances must complete:

1. You must submit a paper FAFSA (not the FAFSA Worksheet) for the 2008 – 09 academic year. This form can be obtained by calling the US Department of Education at 1-800-433-3243. You can download a PDF file of the FAFSA by logging into www.Federalstudentaid.ed.gov. Once on the site, click the FAFSA Filing Options on the right side of the page; you will have a choice of printing the form in either English or Spanish.
2. The **IU South Bend Financial Aid Application**
3. Return all documentation listed below to the IU South Bend Office of Financial Aid. All documentation is required and must be submitted in its entirety.

Note: Failure to provide all required information will result in the appeal being returned to you. Additional information/documentation may be required after initial review by an administrator

Required Documentation

- A. **You must provide a detailed statement describing the unusual circumstances that you feel are relevant to determining your dependency status.** Circumstances that are considered unusual may include, but are not limited to, mental, emotional, physical, or sexual abuse. Even though you may have experienced these types of conditions, you must provide the following information if your parents provide any of the following support:
 1. A description of the financial support you receive from your parents. Refer directly to any amounts received, e.g., “I receive \$100 toward my rent each month.”
 2. A description of other support paid on your behalf by your parent(s), e.g., “I am still on my parent’s health insurance,” or “My parents pay for my car insurance.”
 3. The last statement must be worded as follows “I certify that all information provided in this letter and all documentation submitted to support my appeal are true to the best of my knowledge.”
 4. Your signature and the date
- B. **Include relevant documentation from at least three knowledgeable professionals (i.e. counselor, clergy, law enforcement, court officials, etc.) that have been directly involved with your situation to support your statement.** Any letters specifically written on your behalf for this appeal must be on letterhead and signed by the professional.
- C. **You must provide signed copies of your 2007 federal income tax returns, including all schedules and W-2s.**
- D. **If you are not living with your parents, you must provide a copy of your *current* lease agreement or mortgage statement.** Include the names of other people responsible for monthly rent payments. If you are living with someone and your name does not appear on the lease, please explain your living arrangements in your letter and include a copy of their lease.

Send all information to:

Office of Financial Aid
Indiana University South Bend
1700 Mishawaka Avenue
South Bend, IN 46634-1700

2008 - 2009 INDEPENDENT STUDENT DEFINITION
SEC.480(d) Federal Higher Education Reauthorization Act of 1992

An individual who meets one of the following criteria will be considered independent when applying for financial aid (Refer to 2008 - 2009 FAFSA questions #48-55.):

1. Is at least 24 years old (born before 1/1/1985)
2. Is working on a master's or doctorate program
3. Is married
4. Has children for whom they provide over 50 percent of support in a calendar year
5. Has dependents (other than children or a spouse) for whom they provide over 50 percent of support in a calendar year
6. Is an orphan or ward of the court
7. Is a veteran of the U.S. Armed Forces

Students who do not meet the above criteria are considered dependent for financial aid purposes. Parental data is required when completing the 2008 - 2009 FAFSA. If a student is adopted, then the adoptive parent is considered to be the parent and their information must be provided. If a student's biological parents are divorced, the student should report the information of only the biological parent with whom the student lived the most during the past year. If the student did not live with either parent; or lived equally with each parent, then the parental information must be provided for the parent from whom the student received the most financial support, or the parent from whom the student received the most support the last time support was given. If that parent has remarried, then the stepparent's information is also required on the FAFSA. **There are no exceptions.**

Requirement of Parental Information

The law governing the FSA programs is based on the premise that the family is the first source of a student's support, and the law provides several criteria that decide if a student is considered independent of his/her parents for aid eligibility. Note that a student reaching the age of 18 or 21 or living apart from her parents does not affect his/her dependency status (U.S. Department of Education, Student Financial Aid Handbook, 2008 - 2009, Chapter 1, page 22).

The Higher Education Act allows an aid administrator to make dependency overrides on a **case-by-case** basis for students with unusual circumstances. If the administrator determines that an override is appropriate, he/she must write a statement detailing the determination and must include the statement and supporting documentation in the student's file. **However, none of the conditions listed below, singly or in combination, qualify as unusual circumstances meriting a dependency override:**

- 1) Parents refuse to contribute to the student's education;
- 2) Parents are unwilling to provide information on the FAFSA or for verification;
- 3) Parents do not claim the student as a dependent for income tax purposes;
- 4) Student demonstrates total self-sufficiency. (U.S. Department of Education, Student Financial Aid Handbook, 2007 - 2008, Chapter 1, page 24).

Use of Legal Guardian Information

A foster parent or legal guardian is not treated as a parent when determining financial aid eligibility. If parents are deceased, the student is independent because they are considered to be an orphan. A dependent student must report information about his or her parents even if he or she has a legal guardian, unless the school does a dependency override. If a student is living with his or her grandparents or other relative, the same principle applies. Unless the relatives have adopted the student, the income of the relatives should not be reported on the FAFSA. *These definitions have been copied from the 2007 - 2008 Student Financial Aid Handbook, published annually by the U.S. Department of Education.*