



### **2011-2012 Dependency Status Override Policy and Procedures**

For the 2011-2012 academic years, you are automatically independent for Federal student aid if you meet one of the following criteria:

- You were born before January 1, 1986;
- You will be working on a master's or doctorate program (such as an MA, MBA, MD, JD, or PH.D, etc.) during the school year 2011-2012 (this is not applicable to students attending Southern Vermont College);
- You were married on or before the date you applied for aid;
- You have children who receive more than half of their support from you;
- You have dependents (other than your children and spouse) who live with you and who receive more than half of their support from you, from July, 1 2011 through June 30, 2012;
- You are an orphan or ward of the court or you were a ward of the court until age 18;
- You are currently serving on active duty in the U.S. Armed Forces for purposes other than training;
- You are a veteran of the U.S. Armed Forces.

**Use of Professional Judgment:** Federal regulations permit a financial aid officer to exercise professional judgment to give an otherwise dependent student independent status if unusual circumstances can be documented by the student. The determination is made on a case-by-case basis, and must be supported by documentation provided by the student.

**What Does Not Constitute Unusual Circumstances:** Southern Vermont College maintains that certain circumstances cannot be considered unusual. For example, a parent refusing to provide data, a student who does not want to ask parents for information, a student who has been "on his/her own" for several years, and/or a student who does not want to communicate with his/her parents will not be considered unusual circumstances.

**Please Note:** Your living situation (whether or not you live with your parents) does not affect your dependency status. If you do not satisfy at least one of the Federal criteria for independent status listed above, you are a dependent student for the purpose of Federal student aid.

**Student Procedures:** if you are a dependent student by the Federal definition, but you believe that unusual circumstances are present that establish you as "independent," you can request a review of your situation by the Financial Aid Office. The following procedure is required:

- A. You must provide the Financial Aid Office, in writing, a full explanation of your unusual circumstances. This letter must provide all relevant information about your claim, including specific dates and court documentation (if applicable).
- B. You must provide written documentation from **at least one** disinterested third party and/or agency confirming the specifics as described by you in (A). This documentation must be in writing, on the appropriate letterhead, and must be signed (see reverse side for instructions).
- C. Submit a signed copy of your 2010 Federal Tax Return and all related W2 forms. If you did not file a tax return, you must provide a written explanation of how you were supported during the calendar year of 2010.

### **Instructions for Third Party Documentation**

In extraordinary and documented cases, the Financial Aid Office has the authority to use professional judgment to override a student's dependency status. An approved override would make a student independent for the purpose of applying for financial aid. A student must be unable to obtain his/her parent's information because of extenuating circumstances.

Parent's unwillingness to provide the information or inability to help support the student is not acceptable reasons for an appeal. Students must submit a Dependency Override Request and a third party reference letter to the Financial Aid Office for consideration of a dependency override.

The information stated in the Dependency Override Request must be verified by a third party who is aware of your home situation and can verify from first-hand knowledge the information you have provided. Examples of such a person include, but are not limited to: employer, clergy, social worker, attorney, court official, teacher, counselor, psychiatrist, psychologist, medical professional, law enforcement agent, etc.

### **Instructions for Third Party Reference:**

Third party documentation must be on a SEPARATE sheet of official letterhead. Please include any information of which you have first hand knowledge and that you feel best describes the student's situation.

The following is a list of information that **MUST** be included in your letter:

- How long have you known the student?
- Your relationship to the student.
- When was the last time the student lived with and/or received financial support from his/her parents?
- Any knowledge of his/her current relationship with their parents.
- The steps that the student has taken to establish independence from his/her parents.
- Please make sure to include your professional title, name and type of business, business address, telephone number, and where to contact you should any additional information be required.

***The Financial Aid Office will determine if unusual circumstances exist based on the documentation submitted. The student will be notified in writing of the decision.***