



Financial Aid Office

Contact Us:
P: (972)881-5760
Financialaid@collin.edu

2023 – 2024 REQUEST FOR DEPENDENCY OVERRIDE

Student Information

Name: \_\_\_\_\_ CWID: \_\_\_\_\_

Have you ever received a Dependency Override before? \_\_\_\_\_ YES \_\_\_\_\_ NO

If so, where and when? \_\_\_\_\_

If you believe you have unusual circumstances that may impact your dependency status for the 2023-2024 academic year, you may request a review of your dependency status by submitting this form along with supporting documentation. Please fill out the form completely and submit with the documentation requested on page 2 to the Financial Aid Office. Your Financial Aid Advisor will review your case, make a determination, and advise you as soon as possible.

Please note that per federal regulations, NONE of the conditions listed below, singly or in combination, qualify as unusual circumstances or merit a dependency override:

- Parents refuse to contribute to student's education;
Parents are unwilling to provide information on the application or for verification;
Parents do not claim the student as dependent for income tax purposes;
Student demonstrates total self-sufficiency

PLEASE NOTE: Dependency status must be re-certified every year and if you transfer from, or to another school.

Continue to next page

Office use only:

Aid Year: \_\_\_\_\_ Campus: \_\_\_\_\_ Date: \_\_\_\_\_ RRAAREQ Code: DO Status Code: \_\_\_\_\_ Initials: \_\_\_\_\_

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## 2023 – 2024 REQUEST FOR DEPENDENCY OVERRIDE

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### **Required Documentation:**

#### **A. A personal typed letter from YOU explaining your request for a dependency override.**

Provide as much detail as possible describing your separation from your parents. The following information is **required**:

- Include the last contact you had with each parent and the frequency of contact with each parent over the past year.
- Explain why you cannot provide parental financial information on the 2023-2024 FAFSA
- Describe your living arrangements over the past several years, including with whom you resided and who has provided support to you.

#### **B. Letters from two (2) individuals who can attest to your situation.**

The letters should provide as much detail as possible describing your separation from your parents. Stating that you live on your own and support yourself is not grounds for a Dependency Override. We need information pertaining to your relationship/separation with your parents.

- Each letter must include the individual's name, title or position, address and signature.
- One letter must be from a professional individual and must be on letterhead. This person **cannot be related to you or living at the same address** - guidance counselor, social worker, teacher, doctor, family counselor, clergy, police, etc.
- The second letter can be from somebody who can verify your situation as described above. This person **cannot be related to you or living at the same address**. – friend's mother, etc.

These individuals cannot be related to each other **AND** must reside at separate addresses.

#### **C. An Independent Verification Worksheet.** See page 3.

#### **D. A copy of your 2021 Tax Return Transcript (NOT the tax return).** If you did not file, you **must** submit Verification of Non-Filing Letter from the IRS and other documentation, such as W-2s, copy of recent paycheck stubs, a detailed statement of income earned and support provided to you by others, government assistance received such as Worker's Compensation, Social Security Benefits, TANF, etc.

#### **E. We must have a valid Free Application for Federal Student Aid (FAFSA) on file.** The FAFSA does allow students to file and indicate that they cannot provide parental data.

### **Student Certification:**

I certify that all information submitted on and with this form is true and correct to the best of my knowledge. I agree to provide additional information or documentation if requested.

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Student Signature

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Date



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2023 – 2024 INDEPENDENT VERIFICATION WORKSHEET

Student Information

Name: \_\_\_\_\_ CWID: \_\_\_\_\_

Your application has been selected by the Dept. of Education for review in a process called "Verification." In this process, we are required by federal law (34 CFR, Part 668) to compare information from your Free Application for Federal Student Aid (FAFSA) with information from you (and your spouse if you are married) and your parent(s)/stepparents' (if you are dependent) 2021 federal tax transcripts and/or other financial documents. If there are any discrepancies, we may request further clarification. If corrections are needed, we will make them on your behalf and notify you of the change. It is important that you respond promptly to this request. We cannot award you financial aid until your file is complete.

Independent Student's Family Information

List below the people in your household. Include:

- Yourself.
• Your spouse, if you are married.
• Your children, if any, if you will provide more than half of their support from July 1, 2023, through June 30, 2024, or if the child would be required to provide your information if they were completing a FAFSA for 2023–2024. Include children who meet either of these standards, even if they do not live with you.
• Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2024.

Include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a Title IV eligible postsecondary educational institution any time between July 1, 2023, and June 30, 2024. If more space is needed, attach a separate page with your name and Student ID Number at the top.

Table with 5 columns: Full Name, Age, Relationship, College, Will be Enrolled at Least Half Time. Includes an example row for Marty Jones.

Office use only:

Aid Year: \_\_\_\_\_ Campus: \_\_\_\_\_ Date: \_\_\_\_\_ RRAAREQ Code: IVST20 Status Code: \_\_\_\_\_ Initials: \_\_\_\_\_

Student's Name: \_\_\_\_\_

CWID: \_\_\_\_\_

### Income Information to Be Verified

1. **TAX RETURN FILERS** - Check one of the following:

- I, the student, certify that I have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2021 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. I also certify that I **DID NOT MAKE CHANGES** to any of the data once it was transferred.

*Your Financial Aid Advisor will verify that you a) used the IRS Data Retrieval Tool in FAFSA and b) made NO CHANGES to the data once it was transferred. If they can confirm both items, they will use the IRS information that was transferred. However, if the Financial Aid Advisor cannot confirm one or both of the above, you will be required to submit a 2021 tax transcript.*

- I, the student, was unable or chose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and am submitting to the school my (and my spouse's if married) **2021 IRS Tax Return Transcript(s)**—not photocopies of the income tax return.

*To obtain an IRS Tax Return Transcript, go to [www.irs.gov](http://www.irs.gov) and click on the "Get Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS Tax Return Transcript" and **not** the "IRS Tax Account Transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2021 IRS tax return was filed). It takes 2 - 3 weeks for IRS income information to be available for electronic IRS tax return filers, and 8 - 11 weeks for paper IRS tax return filers.*

*If you filed an amended tax return, you will need to submit an "IRS Tax Return Transcript" and a signed copy of the **1040X**.*

2. **TAX RETURN NONFILERS**—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2021 income tax return with the IRS. If you fall into either category below, you **MUST** provide a Verification of Non-Filing Letter from the IRS with this form.

**Check the box that applies:**

- I, the student, (and, if married, my spouse) was not employed and had no income earned from work in 2021.
- I, the student, (and, if married, my spouse) was employed in 2021 and have listed below the names of all employers and the amount earned from each employer in 2021. Attach copies of all 2021 W-2 forms issued to you (and, if married, to your spouse) by employers. *If more space is needed, attach a separate page with your name and CWID at the top.*

Employer's Name	2021 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>

Please note: Per federal regulations, you are required to submit a 2021 Federal Tax Return Transcript. All tax filers use IRS Form 1040 and any applicable numbered or lettered IRS schedules. Instructions for obtaining a tax transcript can be found above. Please make copies of the tax transcript for your own records **PRIOR** to submitting the verification paperwork to our office.

Student's Name: \_\_\_\_\_

CWID: \_\_\_\_\_

**Other Information to Be Verified**

1. Please complete the chart on the next page. Please put \$0's in any space where the answer is \$0. Do not leave blank.

Student/Spouse	2021 ADDITIONAL FINANCIAL INFORMATION
\$	Taxable earnings from need-based employment programs such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
\$	Grant and scholarship aid reported to the IRS in the adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
\$	Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do <b>not</b> enter untaxed combat pay reported on the W-2 (Box 12, Code Q).
\$	Earnings from work under a Cooperative Education Program offered by a college.
Student/Spouse	2021 UNTAXED INCOME
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 Form (Boxes 12a through 12d, codes D, E, F, G, H, and S).
\$	Child support you <b>received</b> for all children. Do not include foster care or adoption payments.
\$	Housing, food and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do <b>not</b> include the value of on-base military housing or the value of a basic military allowance for housing.
\$	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
\$	Other untaxed income not reported, such as worker's compensation, disability, Black Lung Benefits, untaxed portions of health savings accounts from IRS Form 1040 Line 25, Railroad Retirement Benefits, etc. <b>DO NOT INCLUDE:</b> student aid, earned income credit, additional child tax credit, TANF payments, untaxed Social Security benefits, Supplemental Security Income (SSI), Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion, or credit for federal tax on special fuels.
\$	Money <b>received</b> , or paid on your behalf (e.g., bills), not reported elsewhere on this form.

**Certification and Signature**

By signing this worksheet, I certify that all information reported on this worksheet is complete and correct. **Warning:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date