

2021-22 Dependency Override Appeal

Dependency status is determined by the answers to the questions in Step Three of the Free Application for Federal Student Aid (FAFSA) and dependent students must submit parental information. If unusual circumstances exist, a dependent student may appeal to be treated as an independent student and not submit parental information. Approved Dependency Overrides are granted on a yearly basis. Therefore, a student who was granted a Dependency Override must reapply for a Dependency Override in subsequent academic years until such time the student qualifies as an independent student for FAFSA purposes.

Priority Deadlines*: Fall 2021 – 07/22/21 | Spring 2022 – 11/29/21 | Summer 2022 – 04/21/22

A. Student Information

_____	_____	_____	B# _____
Last Name	First Name	M.I.	Student ID

B. Were you approved for a Dependency Override in a prior year?

- No** – continue to [Section C](#).
- Yes** – provide a dated, typed letter explaining your current parental situation. You must include information about both parents (biological or adoptive). Your statement should include the following information:
 - (1) Last date and nature of parental contact
 - (2) Location of your parents (if unknown, please indicate last known location)
 - (3) How you have supported yourself for the last 2 years

Skip to [Section D](#) on page 2.

C. Request Consideration for Initial Dependency Override

There are certain instances in which a student may be considered for a Dependency Override including, but not limited to, parental abuse, parental abandonment, or incarceration of a parent. ***Self-sufficiency of the student or parental unwillingness to financially contribute to a student's education are not adequate grounds for a Dependency Override.***

For your appeal to be considered you need to provide the following documentation:

- A typed letter explaining your current parental situation. You must include information on both parents (biological or adoptive). Your statement should include the following information:
 - (1) Last date and nature of parental contact
 - (2) Location of your parents (if unknown, please indicate last known location)
 - (3) How you have financially supported yourself for the last 2 years
- Attach two typed statements signed and dated from third parties who have knowledge of your unusual circumstances and knowledge concerning your relationship with your parents (e.g. teacher, high school guidance counselor, member of clergy, law enforcement representative, social worker, medical authority, clerk of courts, etc.). If applicable, please also attach any other relevant supporting documentation (such as court documents, police reports, etc.).

Continue to [Section D](#).

* This form must be submitted by the priority deadline to ensure a determination of eligibility before the Fee Due Date. Students may still apply for aid after the priority deadlines, but EFSC cannot guarantee that late submissions will be notified of aid eligibility prior to the Fee Due Date.

D. Student Income Information – You must check only 1 box below.

- I filed a 2019 IRS tax return. – Go to **Section #1** below.
- I did not and will not file a 2019 IRS tax return. – Go to **Section #2** on page 3.
- I was granted a tax extension, filed an amended return, was a victim of IRS tax-related identify theft, or filed a non-IRS income tax return for 2019. – Go to **Section #3** on page 4.

1. STUDENT TAX RETURN FILERS (IRS FORM 1040)

The best way to verify income is by using the IRS Data Retrieval Tool (IRS DRT) that is part of *FAFSA on the Web* at [FAFSA.gov](https://fafsa.gov). Use of the IRS DRT is **strongly** recommended.

Check the box that applies:

- I **have used** the IRS Data Retrieval Tool in *FAFSA on the Web* to transfer 2019 IRS income tax return information into my FAFSA.
- I **have not yet used** the IRS Data Retrieval Tool in the FAFSA but **will use** the tool to transfer 2019 IRS income tax return information into my FAFSA. *Verification cannot be completed until the IRS information has been transferred into the FAFSA.*
- I am **unable or choose not to** use the IRS Data Retrieval Tool in the FAFSA. I will submit to EFSC a **2019 IRS tax return transcript** or a **signed copy of the 2019 IRS Form 1040** I filed with the IRS. You must check **one** box below.
 - My 2019 IRS Tax Return Transcript is **attached** to this worksheet.
 - My 2019 IRS Tax Return Transcript **will be submitted to EFSC later**. *Verification cannot be completed until the IRS tax return transcript has been submitted to EFSC.*
 - My **signed** copy of the 2019 IRS Form 1040 and applicable schedules I filed with the IRS is **attached** to this worksheet.
 - My **signed** copy of the 2019 IRS Form 1040 and applicable schedules I filed with the IRS **will be submitted to EFSC later**. *Eligibility for aid cannot be determined until one of the IRS tax documents is received.*

A **2019 IRS Tax Return Transcript** may be obtained through:

Get Transcript ONLINE

- Go to www.irs.gov and click on "Get Your Tax Record." Click on "Get Transcript Online."
- To use the new Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Get Transcript by MAIL

- Go to www.irs.gov and click on "Get Your Tax Record." Click on "Get Transcript by Mail."
- Make sure to request the "IRS Tax Return Transcript" and **NOT** the "IRS Tax Account Transcript."

Paper Request Form

- Complete **IRS Form 4506-EZ** and mail or fax to the IRS.
- Do **NOT** request to have your transcript mailed directly to EFSC.
- Please allow a minimum of 5-10 days to receive the transcript.

Go to Section D on page 5.

2. STUDENT TAX RETURN NONFILERS

Complete this section if you will not file and are not required to file a 2019 income tax return with the IRS.

Check the box that applies:

- I **was not employed** and had no income earned from work in 2019.
- I **was employed in 2019** and have listed below the names of all employers, the amount earned from each employer in 2019, and whether an IRS W-2 form is attached. You are required to submit a copy of each W-2 that was issued. List every employer even if they did not issue an IRS W-2 form.

Employer's Name	IRS W-2 Issued by Employer	IRS W-2 Attached	2019 Amount Earned
<i>Suzy's Auto Body Shop (example)</i>	<i>Yes(example)</i>	<i>Yes(example)</i>	<i>\$2,000.00(example)</i>
Total Amount of Income Earned From Work			\$

You must submit an IRS Verification of Non-filing Letter.

- My 2019 IRS Verification of Non-filing Letter is/are **attached** to this worksheet.
- My 2019 IRS Verification of Non-filing Letter **will be submitted to EFSC later.**

Verification cannot be completed until the IRS tax return transcript has been submitted to EFSC.

A **2019 IRS Verification of Non-filing Letter** may be obtained through the following methods.

NOTE: if you have NEVER filed a tax return, you MUST use the Paper Request Form.

Get Transcript ONLINE

- Go to www.irs.gov, click under the Tools heading, click "Get Your Tax Record."
- Click "Get Transcript Online."
- Make sure to request the "Verification of Non-Filing Letter."

Get Transcript by MAIL

- Go to www.irs.gov, click under the Tools heading, click "Get Your Tax Record."
- Click "Get Transcript by Mail."
- Make sure to request the "Verification of Non-Filing Letter."

Paper Request Form

- Complete **IRS Form 4506-T** and mail or fax to the IRS
- Do NOT request to have your Verification of Non-Filing mailed directly to EFSC.
- Please allow a minimum of 5-10 days to receive the Verification of Non-Filing.

Go to Section D on page 5.

EFSC Office of Financial Aid

www.easternflorida.edu/go/aid | (321) 433-7339 | finaid@easternflorida.edu

3. STUDENT TAX FILERS WITH UNUSUAL CIRCUMSTANCES

If you are a tax filer with unusual circumstances for 2019, indicate below and submit all required documents listed. *Verification cannot be completed until all documents are submitted.* **Check the box that applies:**

- I was granted a **filing extension** by the IRS.

If you are required to file a 2019 IRS income tax return and have been granted a filing extension by the IRS, you must provide:

- A copy of IRS Form 4868, “*Application for Automatic Extension of Time to File U.S. Individual Income Tax Return*,” that was filed with the IRS for tax year 2019; **AND**
- A copy of the IRS’s approval of an extension beyond the automatic six-month extension; **AND**
- *Verification of Non-filing Letter* (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2020; **AND**
- A copy of IRS Form W–2 for each source of employment income received for tax year 2019 and, if self-employed, a signed statement certifying the amount of your Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2019.

- I filed an **amended IRS income tax return** (1040X).

If you filed an amended IRS income tax return for tax year 2019 you must provide:

- A 2019 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified **AND**
- A signed copy of the 2019 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

- I am a victim of IRS tax-related **identity theft**.

If you were a victim of IRS tax-related identity theft you must provide:

- A Tax Return DataBase View (TRDBV) transcript obtained from the IRS by calling the Identify Protection Specialized Unit (IPSU) at 1-800-908-4490, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified **AND**
- A statement signed and dated by you indicating that you were a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

- I filed a **non-IRS income tax return**.

- A tax filer who filed an income tax return with Guam, the Commonwealth of the Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if we question the accuracy of the information on the signed copy of the income tax return, the tax filer must provide us with a copy of the tax account information issued by the relevant tax authority before verification can be completed.
- A tax filer who filed an income tax return with the tax authority for American Samoa must provide a copy of his or her tax account information.
- A tax filer who filed an income tax return with tax authorities not mentioned above, i.e. a foreign tax authority, and who indicates that he or she is unable to obtain the tax account information free of charge, must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of his or her income tax return that was filed with the relevant tax authority.

Go to Section D on page 5.

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E. Certification and Signature

By signing below I certify that all of the information reported is complete and correct.

WARNING: If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student's Signature

Can be signed electronically if submitted via Financial Aid Document Upload Tool in myEFSC.

Date

F. Document Submission

You may submit this document by the following methods:

1. FINANCIAL AID DOCUMENT UPLOAD TOOL (RECOMMENDED)

Complete and sign this document, scan, and upload using the **Financial Aid Document Upload Tool** in **myEFSC** under *Financial Aid Forms & Upload*.

2. BY MAIL

Mail your document to the Office of Financial Aid at:

Eastern Florida State College
Office of Financial Aid
Building 2, Room 209
1519 Clearlake Road
Cocoa, FL 32922

3. IN-PERSON

Please visit easternflorida.edu/go/aidcontacts for current hours and availability.

QUESTIONS?

Financial Aid Specialists are available by phone at 321-433-7339 and via e-mail at finaid@easternflorida.edu.

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For additional information, visit Eastern Florida State College: easternflorida.edu/go/equity.*