



# Independence Review 2026-27, Page 1

Office of Student Financial Services  
200 Hawk Drive,  
New Paltz, NY 12561-2438  
Phone: 845-257-3250  
Fax: 845-257-3568

## Student Information

**Student Name:** \_\_\_\_\_ **Student ID:** \_\_\_\_\_

**Address:** \_\_\_\_\_

## About Independent Status for Financial Aid

Financial aid regulations assume that the family has primary responsibility for meeting the educational costs of students, therefore most students are considered dependent for financial aid purposes. However, some students can be considered independent if they meet certain criteria. This is known as a “dependency override”. The purpose of this form is for us to review your circumstances to determine whether you can be considered independent for federal financial aid purposes (FAFSA). The decision to change a student’s dependency status is based on the financial aid administrator’s judgment and is final and cannot be appealed to the U.S. Department of Education.

Please read the information on the following pages to determine whether any of the criteria apply to you. If you determine that you meet the criteria to be considered independent for federal aid purposes, please check the appropriate box, and sign and return this form to us. If there is required documentation listed for your selection, please submit the documentation with this form.

Please note, the New York State Higher Education Services Corporation has their own criteria for determining independent status for NY-based aid programs like TAP.

## **Special note for returning students who have been approved for independent status at SUNY New Paltz in prior years:**

If you are a returning student and have been granted a dependency override at SUNY New Paltz in the past, you can submit a written letter confirming that your circumstances have not changed. You will not need to provide other documentation again unless specifically requested by a Financial Aid Advisor.

Please note, transfer students who have been approved as Independent previously at another institution are not automatically independent at SUNY New Paltz and must provide documentation of their situation.

## **You are automatically considered an independent student for 2026-2027 if you meet at least one of the following criteria:**

- You were born before January 1, 2003.
- You are married or remarried (not separated) as of the date the 2026-2027 FAFSA is filed.
- You are a graduate student (enrolled in a master's or graduate certificate program).
- 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.

## **Additional Qualifying Criteria (Documentation Required)**

You may also be considered independent for 2026-2027 if you meet one of the following criteria, however, you must provide appropriate documentation before a final determination of independence can be made. Most situations that qualify for independent status involve the involuntary dissolution of the family unit and can be documented. A cover letter explaining the situation is recommended.

**Please review the information provided on the following two pages to determine if you qualify for a dependency override. Check the box for the option that best describes your situation. When submitting this form, please provide the documentation indicated immediately below your choice.**

**Option 1:** Both parents are deceased, or you were an orphan (no living biological or adoptive parent), in foster care, or a dependent/ward of the court at any time since you turned age 13.

**Required documentation for option 1:** provide death certificates or court documentation of status.

**Option 2:** Are or were a legally emancipated minor as determined by a court in your state of legal residence. (Please note, New York State does not grant emancipation status to minors)

**Required documentation for option 2:** provide court documents from your state of residence.

**Option 3:** Are or were in a legal guardianship (by someone other than your parent or stepparent) as determined by a court in your state of residence.

**Required documentation for option 3:** provide court documents from your state of residence.

**Option 4:** Now have or will have children who will receive more than half of their support from you between July 1, 2026, and June 30, 2027.

**Required documentation for option 4:** you must provide a 2024 signed IRS 1040 or tax return transcript (from the [Internal Revenue Service website](#) and request a “Return Transcript” for 2024), and/or a letter explaining living arrangements, earnings and support information, and the name of person(s) claiming child(ren) if other than self.

**Option 5:** Have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now through June 30, 2027.

**Required documentation for option 5:** You must provide a signed 2024 IRS 1040 or tax return transcript (from the [Internal Revenue Service website](#) and request a “Return Transcript” for 2024), and a letter explaining living arrangements, earnings, and support information.

**Option 6:** Were determined to be an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless by a director of an emergency shelter or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving those experiencing homelessness at any time on or after July 1, 2025.

**Required documentation for option 6:** Provide written, signed documentation from shelter or agency on organizational letterhead.

**Option 7:** Were determined to be an unaccompanied youth who was homeless or were self-supporting or at risk of being homeless by your high school or school district homeless liaison at any time on or after July 1, 2025.

**Required documentation for option 7:** Provide written, signed documentation from school liaison on district letterhead.

**Option 8:** Were determined to be an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless by a director or designee of a project supported by a federal TRIO or GEAR UP program grant at any time on or after July 1, 2025.

**Required documentation for option 8:** Provide written, signed documentation from agency on organization letterhead.

None of the following situations qualify as sufficient to merit a dependency override:

- Parents refuse to contribute to a student's education.
- Parents are unwilling to provide information for the application or verification.
- Parents do not claim the student as a dependent for income tax purposes.
- Student demonstrates total self-sufficiency and does not live with parents.

Rare and unusual circumstances that may be considered for a dependency override:

In rare, unusual cases such as a documented abusive or threatening family environment, complete parental abandonment, being estranged from their parents, both parents currently being incarcerated or institutionalized, or if neither parent can be located (and have not been adopted), a dependency override may be granted by a Financial Aid Administrator. Special unusual circumstances also include being a victim of human trafficking, having refugee or asylee status and are separated from their parents or their parents are displaced in a foreign country or unusual circumstances that prevent the student from contacting their parents or would contacting both of their parents pose a risk to the student.

In order for a Dependency Override to be considered documentation must be submitted which substantiates the special or unusual circumstances of an individual student and may include, but is not limited to:

- Court Documents
- Police Reports
- Death Certificates
- Submission of a court order or official federal or state documentation that the student or the student's parents or legal guardians are incarcerated in any federal or state penal institution

- Supplementary information, as necessary, about the financial status or personal circumstances of eligible applicants as it relates to the special circumstances or unusual circumstances based on which the applicant is requesting an adjustment.
- Signed letters from professionals who are aware of the student's situation (high school counselors, therapists, caseworkers, clergy member, or another impartial source familiar with your situation in a professional capacity). These letters should be on professional letterheads and must be signed.
- If you believe that you should be considered for a Dependency Override and are able to provide the required documentation, please submit this form with the accompanying necessary documentation to the Office of Student Financial Services.

### Withdrawing your request for a dependency override

If you have concluded that your situation does not meet the stated criteria for a dependency override and would like to withdraw your request for Independent Status, you will need to update your 2026-2027 FAFSA record to include your parent's information and FSA ID. You will also need to change your answers to the Independence questions to No. If you are having difficulty with this process, please contact the Office of Student Financial Services and ask to speak with a Financial Aid Advisor.

### Form Submission Instructions

Please sign and date below. Then, submit this form and documentation to Student Financial Services at SUNY New Paltz, located in Wooster Hall, Room 124.

Signed and completed forms can also be submitted electronically to: [faodocuments@newpaltz.edu](mailto:faodocuments@newpaltz.edu)

**Student signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_