

**FOR OFFICE USE ONLY**

Date Received: \_\_\_\_\_

Approved: ☐ Yes ☐ No

☐ Notify Registrar

☐ Notify Student

☐ Outcome Date: \_\_\_\_\_

## Undergraduate Residency Reclassification: Cover Sheet

**Do not** complete this form unless you are an enrolled UNDERGRADUATE student.

**This form and all appropriate documentation must be submitted prior to or during the semester for which you want to be considered for residency status. Retroactive appeals WILL NOT be considered.**

**IMPORTANT – Please Read Carefully:** Your residence status for tuition purposes will be determined primarily on the basis of information given in this form. Please answer all questions. **This form will not be accepted unless all of the questions are answered.** CONCEALMENT OF FACTS OR UNTRUTHFUL STATEMENTS MAY CAUSE YOU TO BE SUBJECT TO DISMISSAL FROM THE UNIVERSITY. The Registrar's Office must be notified immediately of any change in residence status that may occur after you have submitted this form. In cases where the question is not applicable, write "NA" in the space provided.

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Student I.D. Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

UMass Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Semester you are applying for: ☐ Fall ☐ Spring 20\_\_\_\_\_

What was your state/country of residency 12 months prior to enrolling at UMass Amherst? \_\_\_\_\_

When did you first enroll at UMass Amherst? ☐ Fall ☐ Spring \_\_\_\_\_ Expected Graduation: (mo)\_\_\_\_/(yr)\_\_\_\_\_

Permanent Home Address (number, street, city, state, zip code) \_\_\_\_\_ Since: mo/day/yr: \_\_\_\_\_

Present Mailing Address (if different from Permanent Home Address) \_\_\_\_\_ Since: mo/day/yr: \_\_\_\_\_

What has changed in your circumstances since first being enrolled at UMass Amherst, and why do you believe you now qualify for in-state tuition and fees?

---

---

---

---

---

---

---

Please submit this cover sheet along with the *following*:

- ☐ In-State Eligibility Worksheet
- ☐ Residency Application Form
- ☐ Supporting Documentation

## Undergraduate Residency Reclassification: In-State Eligibility Worksheet

This worksheet is intended to help enrolled students, or those planning to apply for readmission, determine if they qualify to submit a request for a residency reclassification. It may also assist potential students in determining whether or not they will be accepted as an in-state or out-of-state student upon admission. *Incoming students do **NOT** need to complete this worksheet unless directed to by Admissions.*

Keep in mind that in-state status is based on both citizenship/immigration status and fulfilling the state requirements. If your answer to any question brings you to a statement that you do not qualify for in-state status, it is likely an indicator that a request for a reclassification will be denied.

All questions, or any clarifications, should be posed to [bursar@admin.umass.edu](mailto:bursar@admin.umass.edu) or call to speak with the Residency Officer at 413-545-2368.

### How to submit application and documentation:

In person or by mail:

Office of The Bursar  
215 Whitmore Administration Building  
University of Massachusetts Amherst  
181 Presidents Drive  
Amherst, MA 01003

By email (put all documents into one combined PDF file):

[bursar@admin.umass.edu](mailto:bursar@admin.umass.edu)

By fax:

413-545-2297

### Section 1: Citizenship Status

A. Are you a U.S. citizen or permanent resident? ☐ Yes, proceed to Section 2 ☐ No, proceed to Question B

B. Have you been granted DACA status (Deferred Action for Childhood Arrivals)?

☐ YES, proceed to Section 2, and use Section F for your Supporting Documents ☐ NO, proceed to Question C

C. Use this link: <https://www.umass.edu/admissions/apply/residency> to the Illustrative List to see if your status may qualify for in-state consideration. If you believe you qualify, please submit the relevant document from the list to prove your status and proceed to Section 2. *The Illustrative List contains potentially eligible immigration statuses; the student still must meet the state requirements to qualify for instate status.* If you hold a citizenship/immigration status other than those above, you do *not* qualify for in-state student status.

### Section 2: Sources of Financial Support

A. Are you at least 18 years old **and** completely financially independent from your parents/legal guardians?

☐ YES, you are considered *emancipated*, proceed to Section 3A.

☐ NO, you are considered *unemancipated*.

If a parent/guardian contributed to your financial support in the past 12 months, \_\_\_\_\_% of support.

Were you claimed as an exemption by anyone on the most recent federal income tax return?

☐ Yes (Name/relationship: \_\_\_\_\_) ☐ No

Once you've completed this question, proceed to Section 3B.

B. If you are less than 18 years of age, are you legally married, have no parents, or your parents have no LEGAL obligation to support you?

☐ YES, you are considered *emancipated*, proceed to Section 3A.

☐ NO, you are considered *unemancipated*, proceed to Section 3B.

### Section 3: Physical Residence in MA

A. If emancipated, did you reside in Massachusetts for at least 12 months, as a non-student, prior to beginning your higher education? *(Please respond to question under Question B)*

B. If unemancipated, have your parent(s)/legal guardian(s) resided in Massachusetts for at least 12 months prior to you beginning your higher education?

☐ YES. If yes, but you were accepted as an out of state student, there could be something in your record which conflicts with an in-state student designation. We can investigate that for you, and determine either (a) the reason why you don't meet the qualifications based on all of the information you provided in your application for admission, or (b) what documentation you should submit to for a residency reclassification request. Contact us at [bursar@admin.umass.edu](mailto:bursar@admin.umass.edu).

☐ NO. If no, *unless one of the following bulleted points OR the exceptions detailed in Section 5 apply to you*, you do *not* qualify for in-state student status. Relocation to pursue studies automatically means you are considered to be in Massachusetts as a student. Residency for the purpose of in-state status typically cannot be established while simultaneously enrolled in higher education.

You are not eligible for in-state status unless:

- An interruption of studies for two consecutive semesters (fall and spring only) occurs during which the applicant lives in Massachusetts as a traditional resident (NOT a student) for a 12 month period immediately preceding the applicant's enrollment/reenrollment at UMass Amherst. The applicant must be completely *self-supporting* within Massachusetts during this time, cannot be considered or claimed a dependent by a parent or someone else who resides outside of Massachusetts, and will be required to submit appropriate documentation. If the applicant will be applying for readmission to the university the residency reclassification should be submitted at the same time.
  - If this applies to you, proceed to required documentation at the end of this document.
- The applicant is unemancipated and at least one parent or legal guardian has lived in Massachusetts for at least 12 months and can document they qualify as a valid, traditional resident and the applicant is their legal dependent.
  - If this applies to you, proceed to required documentation at the end of this document.
- One of the exceptions noted in section 5 apply and sufficient documentation is submitted.
  - Proceed to Section 5 for details.

### Section 4: Readmit Students (only applies to someone who has been enrolled at the university, has withdrawn, and now intends to resume their degree program).

If emancipated, have you lived in Massachusetts as a traditional resident (not a student), supporting yourself independently for the last 12 months? If unemancipated, have your parent(s)/legal guardian(s) lived in Massachusetts as traditional residents for the last 12 months?

☐ YES, you will likely be considered in-state status but appropriate documentation will be required.

☐ NO, it is likely you do *not* qualify for in-state student status, unless one of the exceptions in Section 5 applies and required documentation is submitted.

### Section 5: Eligibility Exceptions for In-state Residency Reclassification

- Military (including spouse and dependents)
- Education funded by Commonwealth of Massachusetts
- Marriage to a valid Massachusetts Resident
- Deferred Action for Childhood Arrivals (DACA)
- Permanent Employment Relocation (one year of residence still applies)
- Massachusetts Higher Education Full-time Employees
- Refugee/Asylum Status
- Extraordinary Circumstances

Student Name (Type or Print): \_\_\_\_\_

Student I.D. Number: \_\_\_\_\_ Date: \_\_\_\_\_

## Undergraduate Residency Reclassification: Application Form

Based upon your answers to the questions in the In-State Eligibility Worksheet, if you believe you qualify to apply for a residency reclassification, submit the application and copies of the supporting documents for the semester you wish to be considered. Retroactive appeals for a prior semester WILL NOT be considered.

### Student Information

Are you a citizen of the United States? ☐ Yes ☐ No

If NO, have you been admitted to the United State for permanent residence? ☐ Yes ☐ No

If YES, provide date admitted \_\_\_\_\_ and Alien Registration # \_\_\_\_\_

List addresses over the past two years and dates. Provide copies of leases/deeds.	From (mo/yr)	To (mo/yr)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

List names and addresses of employers for past two years.	From (mo/yr)	To (mo/yr)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

If you have been in the Armed Forces of the United States, give state of entry and dates of service:

State of Entry \_\_\_\_\_ From (mo/yr) \_\_\_\_\_ To (mo/yr) \_\_\_\_\_

### Student's Father

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Permanent Address (number, street, city, state, zip code)

Does your parent own this property in Massachusetts? ☐ Yes ☐ No

Present Mailing Address (if different from Permanent Address)

List residences maintained for the past two years, and dates:	From (mo/yr)	To (mo/yr)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Did he file a Massachusetts state income tax return on total income last year? ☐ Yes ☐ No

Is he a citizen of the United States? ☐ Yes ☐ No

If NO, has he been admitted to the United State for permanent residence? ☐ Yes ☐ No

If YES, provide date admitted \_\_\_\_\_ and Alien Registration # \_\_\_\_\_

If deceased, provide date of death \_\_\_\_\_

## Student's Mother

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Permanent Address (number, street, city, state, zip code)

Does your parent own this property in Massachusetts? ☐ Yes ☐ No

Present Mailing Address (if different from Permanent Address)

List residences maintained for the past two years, and dates:	From (mo/yr)	To (mo/yr)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Did she file a Massachusetts state income tax return on total income last year? ☐ Yes ☐ No

Is she a citizen of the United States? ☐ Yes ☐ No

If NO, has she been admitted to the United State for permanent residence? ☐ Yes ☐ No

If YES, provide date admitted \_\_\_\_\_ and Alien Registration # \_\_\_\_\_

If deceased, provide date of death \_\_\_\_\_

## Student's Spouse

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Permanent Address (number, street, city, state, zip code)

Present Mailing Address (if different from Permanent Address)

List residences maintained for the past two years, and dates:	From (mo/yr)	To (mo/yr)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Date of Marriage \_\_\_\_\_ (provide copy of marriage license)

Does he/she own an automobile registered in Massachusetts? ☐ Yes ☐ No

Did he/she file a Massachusetts state income tax return on total income last year? ☐ Yes ☐ No

Is he/she a citizen of the United States? ☐ Yes ☐ No

If NO, has he/she been admitted to the United State for permanent residence? ☐ Yes ☐ No

If YES, provide date admitted \_\_\_\_\_ and Alien Registration # \_\_\_\_\_

If deceased, provide date of death \_\_\_\_\_

## Applicable only if Unemancipated

If your parents are divorced, separated or deceased, with whom do you make your permanent home (mother, father or legal guardian)? \_\_\_\_\_

If person is your legal guardian or has custody, include proof of court appointment:

Date of proceedings: \_\_\_\_\_ Court: \_\_\_\_\_

Did he/she file a Massachusetts state income tax return on total income last year? ☐ Yes ☐ No

Is he/she a citizen of the United States? ☐ Yes ☐ No

If NO, has he/she been admitted to the United State for permanent residence? ☐ Yes ☐ No

If YES, provide date admitted \_\_\_\_\_ and Alien Registration # \_\_\_\_\_

**Undergraduate Residency Reclassification: Required Supporting Documents**

If you or the person referred to above claim Massachusetts as domicile, you will be requested to furnish evidence to support such claim. The burden of proof in all cases is upon the person making the claim.

If necessary, photocopies of the following will be required – ***do not send originals***: birth certificate, copies of federal and state income tax returns; property ownership; continuous physical presence in Massachusetts during periods when not enrolled as a student; permanent employment in a position *not normally filled by a student*; reliance on Massachusetts sources for financial support; former domicile in Massachusetts and maintenance of significant connections therein while absent; domicile of parent within Massachusetts. **Required documentation is detailed below and materials are specific to the basis of your request.**

**A. Request based upon the Applicant only:**

- ☐ Reclassification application
- ☐ Statement detailing why you believe you qualify for a reclassification
- ☐ Most recent MA resident tax return/most recent federal tax return
- ☐ MA mortgage statement or rental agreement clearly indicating residence in MA for the 12 months prior to enrollment\*\*. *Arrangements with family or friends or secondary property may not be used for this purpose.*
- ☐ MA driver's license (if applicable)
- ☐ Paystubs or letter from employer on company stationery giving dates of employment establishing full-time employment for the last 12 months
- ☐ If not a U.S. citizen, documentation of eligible immigration status
- ☐ If you are under 18, and claim emancipation from your parents, the following information must also be attached to this form:
  - *Affidavit giving date of emancipation, certification that no contribution in the form of large gifts has been made to you for your welfare or to pay directly your tuition and fees, and that you have not been claimed as a tax deduction during the past two years; statement must be signed by BOTH parents and notarized*

**B. Request based upon Parent/Legal Guardian of unemancipated Applicant:**

- ☐ Reclassification application
- ☐ Statement detailing why you believe you qualify for a reclassification
- ☐ Most recent MA resident tax return/most recent federal tax return of the parent/guardian
- ☐ MA mortgage statement or rental agreement of the parent/guardian clearly indicating residence in MA for the 12 months prior to enrollment\*\*. *Arrangements with family or friends or secondary property may not be used for this purpose.*
- ☐ MA driver's license of parent/guardian (if applicable)
- ☐ If not a U.S. citizen, documentation of eligible immigration status
- ☐ Proof that younger siblings are enrolled in MA school system (if applicable)

**Requests based upon Eligibility Exceptions detailed in Section 5:****C. Military**

Active duty members of the U.S. military who are stationed in Massachusetts, pursuant to military orders, spouse and dependent children, are eligible for in-state residency reclassification. The following is required:

- ☐ Reclassification application
- ☐ Assignment orders

**D. Education funded by the Commonwealth of Massachusetts**

Students whose higher education is funded by the Department of Institutional Assistance, the Massachusetts Rehabilitation Commission, the Department of Children and Families, or other Massachusetts assistance programs are eligible for in-state status. The following is required:

- ☐ Reclassification application
- ☐ Documentation from MA agency confirming financial support

### E. Marriage to a Massachusetts Resident

The spouse of any person who is classified or eligible to be classified as a Massachusetts resident is likewise eligible for the purpose of tuition and fees. (This does not apply in the case of a spouse who holds a nonqualifying visa. Please refer to the Illustrative List linked in In-State Eligibility Worksheet, Section 1, Question C).

If the request is based upon Spouse of Applicant, the following is required:

- ☐ Reclassification application
- ☐ Marriage certificate
- ☐ Statement detailing why you believe you qualify for a reclassification
- ☐ Most recent MA resident tax return/most recent federal tax return of spouse
- ☐ MA mortgage statement or rental agreement of the spouse clearly indicating residence in MA for the 12 months prior to enrollment\*\*. *Arrangements with family or friends or secondary property may not be used for this purpose.*
- ☐ MA driver's license of spouse (if applicable)
- ☐ If not a U.S. citizen, documentation of eligible immigration status

### F. Deferred Action for Childhood Arrivals (DACA)

The following is required:

- ☐ Reclassification application
- ☐ VALID EAD (employment authorization document)
- ☐ Approved I-821 or I-821D showing your DACA status
- ☐ Proof that you meet the durational residency requirement in Massachusetts, meaning you have lived in MA for the 12 months prior to enrolling in college. A Massachusetts high school diploma or GED is acceptable.

### G. Permanent Employment Relocation

Please provide information detailed in Sections A or B along with employer letter if applicable.

### H. Massachusetts Public Higher Education System Employees

Full time faculty, professional staff, and classified staff employees of the Massachusetts public higher education system along with their spouses and dependent students are eligible for in-state classification. Please contact [bursar@admin.umass.edu](mailto:bursar@admin.umass.edu) for details including required documentation.

### I. Refugee/Asylum Status

Students who hold refugee or asylum status may be eligible for in-state status consideration provided they are able to document they meet same residency requirements of US citizens. They further must provide United States Citizenship and Immigration Services documentation of their status.

***\*\*In cases of requests based upon the Massachusetts residency of parents, guardians, or spouses, or in the case of employment relocation of a student, all required evidence of eligibility must indicate one year of residence in Massachusetts, and support other residency requirements, but may include time the student was enrolled.\*\****

### Extraordinary Circumstances

Extraordinary circumstances, beyond the student's control, which lead to relocation to Massachusetts may be considered. Extensive documentation will be required for consideration. No matter what the circumstances, we are not able to consider requests for anyone who is not a U.S. citizen, permanent resident, or other legal immigrant status (see Illustrative List linked in Part One, Section 1, C). For clarification on any of the above, or questions of any kind, always contact [bursar@admin.umass.edu](mailto:bursar@admin.umass.edu).