

## UMass Lowell Residency Classification Worksheet: In-State Eligibility

This worksheet will assist enrolled and potential students to determine if they qualify for In-State residency reclassification (tuition and fee purposes). Submit all documentation to the Office of Financial Aid unless directed otherwise. More information is found at [www.uml.edu/residency](http://www.uml.edu/residency).

Continuing Studies Corporate Education (CSCE) students are advised to forward residency classification and tuition inquiries to [CSCEAdmissions@uml.edu](mailto:CSCEAdmissions@uml.edu) or call (978)934-2470.

### I. Citizenship Status

Are you a U.S. citizen, permanent resident, legal immigrant, eligible to apply (in receipt of [I-485](#)), or have refugee/asylum status?

Yes – proceed to section [II](#).

No – not eligible for In-State tuition.

### II. Sources of Financial Support

Are you 18 years and financially independent from your parents/legal guardians? If under 18 years of age, are you legally married, have no parents or your parents have no legal obligation to support or maintain you?

Yes – you are considered *emancipated*. Proceed to section [III](#).

No – you are considered *unemancipated* (you are claimed on someone else's income tax returns). Proceed to section [III](#).

### III. Enrollment Status

Are you a first time applicant for admissions to UMass Lowell (freshman or transfer)?

Yes – Proceed to section [IV](#). This also applies to readmit applicants with a new legal residency.

No - If you are already enrolled at UMass Lowell, proceed to section [V](#). If you are a readmit student, proceed to section [VI](#). If unsure, send inquiry to [residency@uml.edu](mailto:residency@uml.edu).

### IV. Freshman and Transfer Applicants

Physical Residence in Massachusetts - Have you resided in Massachusetts for approximately 12 months prior to applying to UMass Lowell? If unemancipated, have your parents/legal guardians resided in Massachusetts for approximately 12 months prior to applying to UMass Lowell?

Yes – most cases will be considered In-State unless conflicting information is identified on the admissions application, such as:

- parent's permanent residence in another state
- recent relocation to another state
- transcripts from out of state schools
- graduation from a prep/private school in Massachusetts but parents live out of state

The Admissions Office reserves the right to request additional documentation to support a residency claim.

No – Unless one of exceptions in Section [VII](#) applies, your classification will probably be Out-of-State, New England Regional Student Program (NERSP) or Proximity Program. If unemancipated, your residency classification will be based on your parent/legal guardian's residency.

If unsure of your residency classification, check the exceptions listed in section [VII](#) or send a detailed e-mail with all pertinent information to [residency@uml.edu](mailto:residency@uml.edu).

## V. Enrolled Students

Physical Residence in Massachusetts - Initially, did you relocate from another state or country to Massachusetts to attend UMass Lowell? Please note – According to state regulations, **“residency is not acquired by mere physical presence in Massachusetts while the person is enrolled in an institution of higher education.”**

- Yes – This action is not considered intent to become a resident, and therefore the applicant is not eligible for In-State residency classification unless:
- The applicant (*or spouse or parent/legal guardian*) interrupts his/her continuous attendance (Spring and Fall) and lives in Massachusetts as a "traditional resident" (*not a student*) for approximately 12 months immediately preceding the applicant’s re-enrollment at UMass Lowell;
  - The applicant’s spouse or parent/legal guardian lived in Massachusetts as a "traditional resident" (*not a student*) for approximately 12 months immediately preceding the semester for which the request is made for; or
  - One of the exceptions listed in section [VII](#) applies.

- No – The applicant is eligible for In-State residency classification under the following circumstances:
- The emancipated applicant relocated to Massachusetts for reasons other than to attend school in Massachusetts, and meet all requirements to prove intent to maintain residency;
  - The emancipated applicant’s spouse has lived in Massachusetts as a "traditional resident" (*not a student*) for approximately 12 months immediately preceding the semester for which the request is made for;
  - The unemancipated applicant’s parent/legal guardian has lived in Massachusetts as a "traditional resident" (*not a student*) for approximately 12 months immediately preceding the semester for which the request is made for; or
  - One of the exceptions listed in section [VII](#) applies.

*If eligible to apply for residency reclassification, submit copies of the following by these deadlines:*

- *Spring semester – application & documentation must be submitted by the previous December 1<sup>st</sup>*
- *Fall semester – application and documentation must be submitted by the previous August 1<sup>st</sup>.*

Residency Based on Emancipated or Unemancipated Applicant <u>Only</u>	Residency Based on Parent/Legal Guardian of Unemancipated Applicant	Residency Based on Spouse of Emancipated Applicant
<input type="checkbox"/> <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet	<input type="checkbox"/> <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet	<input type="checkbox"/> <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet
<input type="checkbox"/> <i>I-485 (if applicable)</i>	<input type="checkbox"/> <i>I-485 for applicant &amp; parent/legal guardian (if applicable)</i>	<input type="checkbox"/> <i>I-485 for applicant and spouse (if applicable)</i>
<input type="checkbox"/> Passport (preferred) or state-issued ID	<input type="checkbox"/> Passport (preferred) or state-issued ID for applicant and/or parent/legal guardian	<input type="checkbox"/> Passport (preferred) or state-issued ID for applicant and/or spouse
<input type="checkbox"/> Massachusetts driver’s license	<input type="checkbox"/> Massachusetts driver’s license for applicant and/or parent/legal guardian	<input type="checkbox"/> Massachusetts driver’s license for applicant and/or spouse
<input type="checkbox"/> Most recent federal income tax return (CPA-certified; otherwise, a certified copy from IRS may be required)	<input type="checkbox"/> Most recent federal income tax return (CPA-certified; otherwise, a certified copy from IRS may be required) with applicant as dependent	<input type="checkbox"/> Most recent joint federal income tax return (CPA-certified; otherwise, a certified copy from IRS may be required). If recent marriage, individual returns
<input type="checkbox"/> Most recent Massachusetts income tax return (CPA-certified; otherwise, a certified copy from the Dept. of Revenue may be required).	<input type="checkbox"/> Most recent Massachusetts income tax return (CPA-certified; otherwise, a certified copy from the Dept. of Revenue may be required) with applicant as dependent.	<input type="checkbox"/> Most recent joint Massachusetts income tax return (CPA-certified; otherwise, a certified copy from the Dept. of Revenue may be required). If recent marriage, individual returns.

<input type="checkbox"/> Pay stubs or other employer-issued documents establishing employment for the last 12 months. If unemployed, provide documentation to sources of income.	<input type="checkbox"/> Pay stubs or other employer-issued documents establishing employment for the last 12 months for parent and applicant. If parent is unemployed, provide documentation of sources of income.	<input type="checkbox"/> Pay stubs or other employer-issued documents establishing employment for the last 12 months for spouse and/or applicant. If spouse is unemployed, provide documentation of sources of income.
<input type="checkbox"/> Copy of rental/lease agreement or house ownership document that clearly establishes residence in Massachusetts for at least 12 months prior to the start of the semester applied for. Informal family/friend arrangements are not accepted	<input type="checkbox"/> Copy of rental/lease agreement or house ownership document that clearly establishes residence in Massachusetts for at least 12 months prior to the start of the semester applied for. Informal family/friend arrangements are not accepted	<input type="checkbox"/> Copy of rental/lease agreement or house ownership document that clearly establishes residence in Massachusetts for at least 12 months prior to the start of the semester applied for. Informal family/friend arrangements are not accepted
<input type="checkbox"/> Massachusetts car registration	<input type="checkbox"/> Massachusetts car registration for parent and applicant	<input type="checkbox"/> Massachusetts car registration for spouse and/or applicant
<input type="checkbox"/> Voter registration receipt or similar (if applicable)	<input type="checkbox"/> Voter registration receipt or similar for guardian/parent and/or applicant (if applicable)	<input type="checkbox"/> Voter registration receipt or similar for applicant and/or spouse (if applicable)
<input type="checkbox"/> Any other document that establishes intent to maintain residency in Massachusetts.	<input type="checkbox"/> Any other document that establishes intent to maintain residency in Massachusetts.	<input type="checkbox"/> Any other document that establishes intent to maintain residency in Massachusetts.
	<input type="checkbox"/> Birth certificate or similar document for applicant	<input type="checkbox"/> Marriage Certificate

**VI. Readmit Students**

<p>Were you an UMass Lowell student, who interrupted your attendance due to academic probation, personal reasons (<i>good standing</i>), or to establish residency, and are now applying for readmission?</p>	
<p><input type="checkbox"/> Yes – answer the following:                  Have you lived in Massachusetts as a "traditional resident" (<i>not a student</i>) for approximately twelve months? If unemancipated, have your parents/ legal guardians lived in Massachusetts as "traditional residents" (<i>not as students</i>) for approximately twelve months?</p> <p><input type="checkbox"/> Yes – most cases will be considered In-State unless conflicting information is identified on the readmit application. We reserve the right to request documentation.</p> <p><input type="checkbox"/> No – you are probably <u>not</u> eligible unless one of the exceptions listed in section <a href="#">VII</a> apply</p>	<p><input type="checkbox"/> No – You appear to be an enrolled student. Return to section <a href="#">V</a> or send inquiry to <a href="mailto:residency@uml.edu">residency@uml.edu</a>.</p>

**VII. Eligibility Exceptions for In-State Residency Classification**

- [Active Duty Member of the Armed Forces \(Spouse & Dependents\)](#)
- [Divorced Parent/Legal Guardian Resident of Massachusetts](#)
- [Education Pursuits Funded by the Commonwealth of Massachusetts](#)
- [Employment-Related Relocation](#)
- [Extraordinary Circumstances](#)
- [Marriage to Massachusetts Resident](#)
- [Massachusetts Higher Education System Employees](#)
- [Massachusetts National Guard Waiver](#)
- [Refugee/Asylee Status](#)

**Active Duty Member of the Armed Forces (Spouse & Dependents)** - A member of the U.S. Armed Forces who is stationed in Massachusetts on active duty pursuant to military orders, his or her spouse and dependent children, are eligible for In-State classification. This also applies to members separating from the Armed Forces with Massachusetts as their "Home of Record" or "State of Legal Residence Certificate" but before they establish residency in another state.

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| Submit the following: | <input type="checkbox"/> <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet.<br><input type="checkbox"/> Copy of permanent change of station orders, travel orders, honorable discharge documents, or any other legal document from the Armed Forces.<br><input type="checkbox"/> Legible copy of military identification card for the service member and/or spouse/dependent. |
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**Divorced Parent/Legal Guardian Resident of Massachusetts** - If the applicant has a parent/legal guardian that is a legal resident of Massachusetts, and has documented responsibility for financial support of the applicant's education, we will grant In-State residency with documentation.

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| Submit the following: | <input type="checkbox"/> <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet.<br><input type="checkbox"/> Applicant – copy of birth certificate.<br><input type="checkbox"/> Applicant - copy of driver's license and/or passport.<br><input type="checkbox"/> Parents/legal guardians - copy of divorce decree.<br><input type="checkbox"/> Parents/legal guardians - copy of most recent federal and state income tax returns ( <i>signed or certified by a CPA, or issued by IRS for federal returns, or issued by Mass Dept. of Revenue for state returns</i> ).<br><input type="checkbox"/> Massachusetts parent - copy of Massachusetts driver's license or passport.<br><input type="checkbox"/> Massachusetts parent - copy of Massachusetts car registration<br><input type="checkbox"/> Massachusetts parent - copy of rental/lease agreement or house ownership document that establishes residence location for at least 12 months. Informal family/friend arrangements are not accepted.<br><input type="checkbox"/> Massachusetts parent - copy of pay stubs or other employer-issued documents establishing employment for the last 12 months. |
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**Education Pursuits Funded by the Commonwealth of Massachusetts** - Students whose higher education pursuits are funded by the Department of Institutional Assistance, the Massachusetts Rehabilitation Commission, Department of Children and Families (*Department of Social Services*) or other Massachusetts public assistance programs are eligible for In-State classification.

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| Submit the following: | <input type="checkbox"/> <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet.<br><input type="checkbox"/> Copy of letter from Massachusetts agency confirming financial responsibility for the student.<br><input type="checkbox"/> Copy of student's driver's license or official identification. |
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**Employment-Related Relocation** - UMass Lowell will consider applicants whose relocation to Massachusetts is due to a formal offer of employment to the applicant, to a parent/legal guardian, or to a spouse. The employment location has to be in Massachusetts. The relocation has to be completed prior to the beginning of the semester for which the application is made.

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| Submit the following: | <p><u>Emancipated Applicant or Spouse:</u></p> <input type="checkbox"/> Applicant – <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet.<br><input type="checkbox"/> Applicant - copy of Massachusetts driver's license and/or passport.<br><input type="checkbox"/> Applicant (or spouse) – copy of offer letter with employer located in Massachusetts.<br><input type="checkbox"/> Applicant (or spouse) – copy of recent pay stub<br><input type="checkbox"/> Applicant (or spouse) - copy of Massachusetts driver's license and car registration.<br><input type="checkbox"/> Applicant (or spouse) - copy of rental/lease agreement or house ownership document for a property in Massachusetts. Informal family/friend arrangements are not accepted.<br><input type="checkbox"/> Applicant (or spouse) - copy of most recent federal income tax return (signed or certified by a CPA, or issued by IRS). | <p><u>Unemancipated Applicant:</u></p> <input type="checkbox"/> Applicant – <a href="#">In-State Tuition Eligibility Form</a> (signed) & copy of completed residency classification worksheet.<br><input type="checkbox"/> Applicant - copy of Massachusetts driver's license and/or passport.<br><input type="checkbox"/> Parent/legal guardian – copy of offer letter with employer located in Massachusetts.<br><input type="checkbox"/> Parent/legal guardian – copy of recent pay stub<br><input type="checkbox"/> Parent/legal guardian - copy of Massachusetts driver's license and car registration.<br><input type="checkbox"/> Parent/legal guardian - copy of rental/lease agreement or house ownership document for a property in Massachusetts. Informal family/friend arrangements are not accepted.<br><input type="checkbox"/> Parent/legal guardian - copy of most recent federal income tax return (signed or certified by a CPA, or issued by IRS). |
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**Extraordinary Circumstances** – UMass Lowell will consider cases where the relocation to Massachusetts was due to extraordinary circumstances beyond the control of the applicant. Some examples include: death of a parent which results in relocation of unemancipated student to live with relatives in Massachusetts, unexpected loss of employment with less than 12 months residence in Massachusetts, etc. Extensive documentation is required in order for us to consider this type of request. However, as with all other situations, the applicant has to be a U.S. citizen, permanent resident, legal immigrant, or eligible to apply (in receipt of I-485). Application deadlines apply.

Submit the following: Submit detailed e-mail to [residency@uml.edu](mailto:residency@uml.edu) or contact Héctor Malavé, Office of Financial Aid, UMass Lowell, (978)934-4220. Additional documentation will probably be required from the applicant.

**Marriage to a Massachusetts Resident** - The spouse of any person who is classified or is eligible for classification as a Massachusetts resident is likewise eligible for classification as a Massachusetts resident. This provision will not apply in the case of a spouse in the United States on a non-immigrant visa (*unless the applicant has received the I-485*).

Submit the following:

- [In-State Tuition Eligibility Form](#) (signed) & copy of completed residency classification worksheet.
- Copy of marriage certificate.
- Applicant & Spouse - copy of Massachusetts driver's license and/or passport.
- Massachusetts spouse - copy of most recent federal and state income tax returns (*signed or certified by a CPA, or issued by IRS for federal returns, or issued by Mass Dept. of Revenue for state returns*).
- Massachusetts spouse - copy of Massachusetts driver's license or passport.
- Massachusetts spouse - copy of Massachusetts car registration
- Massachusetts spouse - copy of rental/lease agreement or house ownership document that establishes residence location for at least 12 months. Informal family/friend arrangements are not accepted.
- Massachusetts spouse - copy of pay stubs or other employer-issued documents establishing employment for the last 12 months.

**Massachusetts Higher Education System Employees** - Full time faculty, professional staff, and classified staff employees of the public higher education system (UMass, state colleges and community colleges), their spouses and dependent students are eligible for In-State classification.

Submit the following:

- [In-State Tuition Eligibility Form](#) (signed)
- UMass Lowell Employees - send e-mail to [residency@uml.edu](mailto:residency@uml.edu) requesting In-State residency classification. Include your name and employee ID number.
- All other Employees, Spouses & Dependents - send detailed e-mail to [residency@uml.edu](mailto:residency@uml.edu) requesting In-State residency classification. Include name and employee ID number, as well as a copy of the employee identification card.
- Also, for Spouses & Dependents - copy of first two pages of the most recent federal income tax return.

**Massachusetts National Guard Waiver** - Participants in the Massachusetts National Guard 100% Tuition and Fee Waiver program are considered Massachusetts residents for tuition purposes.

Submit the following:

- [In-State Tuition Eligibility Form](#) (signed) & copy of completed residency classification worksheet.
- Copy of Certificate of Eligibility or letter from Massachusetts National Guard confirming waiver for the period under consideration.
- Legible copy of Massachusetts National Guard identification card.

**Refugee/Asylee Status** - Non-citizens who are in, or who are eligible to apply and who have applied for, refugee/asylum status are likewise eligible to be considered for In-State residency. However, if applicant is denied refugee/asylee status, the student's residency will be changed to out-of-state.

Submit the following:

- [In-State Tuition Eligibility Form](#) (signed) & copy of completed residency classification worksheet.
- Legible copy of original passport and visa. We will not accept ineligible copies, copy of a copy, or missing documents. In lieu of these documents, we will accept a copy of an original letter from the U.S. Citizenship & Immigration Services or another federal agency. Attorney letters do not take the place of government documents.
- Legible copy of current driver's license or another type of official identification issued by a state or federal agency.
- Additional documentation may be required as determined by the Residency Reclassification Officer.

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