

2015 – 2016 USC Student Information Worksheet Instructions for Need Access Application

This worksheet represents questions that are typically asked on the Need Access application. When you log in to complete the application online, you may see additional questions that are not listed here, or you may not see questions listed below in the online application.

Note: Asterisks indicate a question that may not be left blank in the application.

Student Information

Last Name (Ref. 1a):*

Enter the last name of the student applying for financial aid.

First Name (Ref. 1b):*

Enter the first name of the student applying for financial aid.

Middle Initial (Ref. 1c):

Enter the middle initial of the student applying for financial aid.

Street Address (Ref. 1d):*

Enter the street address for the student's permanent mailing location.

City (Ref. 1e):*

Enter the city of the student's permanent mailing location.

State (Ref. 1f):*

Select the State/Province/Territory from the list in Appendix A. If no corresponding entry is on this list, select the last entry.

Zip Code (Ref. 1g):

Enter the Postal Service Zip Code.

Territory/Country (Ref. 1h):

For non-U.S. addresses, enter the name of the territory and/or country.

Area Code and Phone Number (Ref. 1i.):

Enter the area code and phone number for the phone where you may be reached during the weeks after you send in this application.

E-mail Address (Ref. 1j):* Enter the student's E-mail address. Example: name@domain.com

State of Legal Residence (Ref. 1n):

Select the State/Province/Territory from the list in Appendix A. If no corresponding entry is on this list, select the last entry.

Student's Academic Plans/Household Information

Degree Objective (Ref. 2a):*

Select the entry which best describes the student's degree objective. If you are enrolled in a certificate program or if none of the answers apply to your situation, select "Other."

1. MA, MS, etc.
2. PhD, EdD, etc.
3. MBA
4. JD, LL.M., JSD
5. MD, DDS, DMD, DVM, DO
6. M Divinity
8. AA, AS (Undergraduate)
9. BA, BS (Undergraduate)
7. Other

Primary Care Objective (Ref. 2b):*

If studying for MD, DO, DDS or DMD degree, does the student plan to practice in primary health care or general dentistry?

1. Yes
2. No

Completion of Degree Requirements (Ref. 2c):*

Select the year in which the student expects to complete the requirements for the degree listed in the question 2a above.

1. 2015
2. 2016
3. 2017
4. 2018
5. 2019
6. 2020 or later

Alien Registration/Visa Status (Ref. 2fa):

If you are a U.S. permanent resident or other eligible noncitizen, enter your alien registration number here. If you are on a student or exchange visa, enter the visa classification (J1, J2, F1, F2, or G) here.

Last Year Student Claimed by Parent (Ref. 2h):*

Enter the four digits of the year in which the student was most recently claimed by a parent as an exemption on a U.S. income tax return. (If the parents never filed U.S. tax returns because they had no U.S. income, enter the student's year of birth. If the parent has not yet completed the current year's tax return and the student will be claimed by the parent, enter the current year.)

Student's Marital Status (Ref. 2K):*

Select the student's Marital Status from the list below. Select "Unmarried" if the student is Single and will not be married by June 1, 2016.

1. Married
2. Unmarried
3. Unmarried, but will be married by 6/1/2016
4. Separated
5. Divorced/widowed

Marriage Date (Ref. 2m):*

Enter the actual or anticipated date of the student's marriage or the date the student was separated, divorced or widowed.

Example: 12/14/2010

Spouse's Enrollment Status (Ref. 2n):*

Will the spouse be a student during the 2015-2016 academic year?

1. Yes, full time
2. Yes, at least half time
3. No

Student/Spouse Separate Household (Ref. 2o):*

Will the student and spouse (or prospective spouse) maintain separate households during the 2015-2016 academic year?

1. Yes
2. No

Separate Student/Spouse Households (Ref. c26):*

Will the student and spouse (or prospective spouse) maintain separate households during the summer of 2015?

1. Yes
2. No

Number of Student's Household Members in College (Ref. 2q):*

Enter the number of people in the student's household who will be attending college, graduate/professional, or other school beyond the high school level between July 1, 2015, and June 30, 2016. Always include the student applicant. Include the spouse and other household members only if they will be enrolled at least half time for at least one term.

Release of Financial Data to Parents (Ref. 2r):*

If the parents discuss the financial aid application with the school's financial aid officer, do you authorize the officer to disclose your information to the parents?

1. Yes
2. No

Federal Benefits Received in 2013 or 2014 (Ref. 2t):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2013 or 2014 from any of the following qualifying programs, OR if as of today you or your spouse are classified as a dislocated worker:

1. Yes
2. No

Qualifying Programs:

- Supplemental Security Income Program (SSI)
- Food Stamp Program
- Free and Reduced Price School Lunch Program
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

A dislocated worker is a person who:

- has been laid off or received a lay-off notice from a job;
- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- was self-employed but unemployed due to economic conditions or a natural disaster; or
- is a displaced homemaker.

Income from non-U.S. Sources in 2014 (Ref. 2z):*

Are you a non-U.S. citizen whose income in 2014 came primarily from non-U.S. sources?

1. Yes
2. No

Supplemental Security Income (Ref. CST202):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2014 or 2013 from Supplemental Security Income.

1. Yes
2. No

Food Stamps (SNAP) (Ref. CST203):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2014 or 2013 from Food Stamps or SNAP.

1. Yes
2. No

Free and Reduced Price Lunch Program (Ref. CST204):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2014 or 2013 from Free and Reduced Price School Lunch Program.

1. Yes
2. No

Temporary Assistance for Needy Families (TANF) (Ref. CST205):*

Select Yes if you or your spouse received aid during 2014 or 2013 from Temporary Assistance for Needy Families (TANF).

1. Yes
2. No

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) (Ref. CST206):*

Select Yes if you or your spouse received aid during 2014 or 2013 from Special Supplemental Nutrition Program for Women, Infants and Children (WIC).

1. Yes
2. No

Dislocated Worker (Ref. CST207):*

Select Yes if as of today you or your spouse are classified as a dislocated worker. In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster; or
- is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay-at-home mom or dad), is no longer supported by the husband or wife, is unemployed or underemployed, and is having trouble finding or upgrading employment.

If a person quits work, generally he or she is not considered a dislocated worker even if, for example, the person is receiving unemployment benefits.

1. Yes
2. No

California Assembly Bill 540 (AB540) (Ref. CST208):*

Are you an undocumented student who meets the criteria described in California Assembly Bill 540 (AB540)?

- Attended a California high school for 3 or more full academic years (between grades 9 through 12. They do not need to be consecutive years);
- Have graduated or will graduate from a California high school or have attained a G.E.D.; or received a passing mark on the California High School Proficiency Exam (CHSPE);
- Register or be currently enrolled at an accredited institution of public higher education in California;
- File or plan to file an affidavit as required by individual institutions, stating that he/she will apply for legal residency as soon as possible;
- Not hold a valid non-immigrant visa (F, J, H, L, A, E, etc.).

1. Yes
2. No

Previous Bachelor Degree (Ref. CST223):*

Have you previously earned a bachelor's degree or an equivalent degree from a college, or will have one by July 1, 2016? An associates degree is not equivalent to a bachelor degree.

- 1) Yes
- 2) No

USC ID Number(Ref. CST224):

Enter your 10 digit USC ID number. Leave blank if unknown.

Dependency Status Determination**Veteran or Member of U.S. Armed Forces (Ref. 2ds1):**

Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training, and/or are you a veteran of the U.S. Armed Forces?

1. Yes
2. No

Dependents other than a Spouse (Ref. 2ds2):

Do you have children who will receive more than half of their support from you between July 1, 2015 and June 30, 2016, and/or do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2016?

1. Yes
2. No

Orphan, Foster Care, Ward of Court (Ref. 2ds3):

At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court? Select Yes if **any** of these conditions apply to you.

1. Yes
2. No

Emancipated Minor or in Legal Guardianship (Ref. 2ds4):

As determined by a court in your state of legal residence, are you or were you an emancipated minor or in legal guardianship? Select Yes if **either** of these conditions apply

1. Yes
2. No

Unaccompanied Homeless Youth (Ref. 2ds5):

At any time on or after July 1, 2014, were you determined to be an unaccompanied youth who was homeless? Select Yes if **both** of these conditions apply to you.

1. Yes
2. No

Housing Plans During 2015 - 2016(Ref. CST044):*

Where do you intend to reside during the 2015 - 2016 academic year? If you're applying to multiple schools and you intend to live on campus if on campus housing is available, choose Resident (On Campus).

1. Resident (On Campus)
2. With Parents
3. Off Campus

Dependent Children (Ref. CST200):*

Select Yes if you have children who will receive more than half of their support from you between July 1, 2015 and June 30, 2016.

1. Yes
2. No

Other Dependents (Ref. CST201):*

Select Yes if you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2016.

1. Yes
2. No

Student's (and Spouse's) Annual Income and Expenses - 2014**Source of Following U.S. Tax Figures (Ref. 3a):***

Select the entry corresponding to the source of 2014 tax figures to be completed below.

1. Completed IRS Form 1040A or 1040EZ
2. Completed IRS Form 1040
3. Estimated IRS Form 1040A or 1040EZ
4. Estimated IRS Form 1040
5. Tax return will not be filed
6. Completed IRS Form 1040NR
7. Estimated IRS Form 1040NR

Number of Exemptions - 2014 (Ref. 3b):*

Enter the number of exemptions claimed for 2014 from:

- IRS Form 1040 line 6d, or
- IRS Form 1040A line 6d

If you (and your spouse) used the 1040EZ and checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions. If neither box on line 5 is checked, enter 1 if single, or 2 if married.

Adjusted Gross Income - 2014 (Ref. 3c):*

Enter 2014 adjusted gross income from:

- IRS Form 1040 line 37, or
- IRS Form 1040A line 21, or
- IRS Form 1040EZ line 4

Itemized Deductions - 2014 (Ref. 3d):*

Enter the amount from Form 1040, Schedule A, line 29. If deductions were not itemized or if a Form 1040A or 1040EZ was filed, enter 0. (Business or Farm owners should not use any amounts from Schedules C or F.)

U.S. Income Tax Paid - 2014 (Ref. 3e):*

Enter the amount of U.S. income tax paid from:

- IRS Form 1040 line 55, or
- IRS Form 1040A line 35, or
- IRS Form 1040EZ line 10.

Do not include any FICA, self-employment, or other taxes. Do not copy the amount of "federal income tax withheld" from a W-2 form.

Student's Income from Work - 2014 (Ref. 3f):*

Enter the total amount of income that the student earned (or will earn) from work during this time period. Include all wages, salaries, tips and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted. Do not include any amount from Federal Work-Study.

This information may be on:

- the W-2 forms,
- IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065);
- IRS Form 1040A—line 7; or
- 1040EZ—line 1.

If any individual earning item is negative, do not include that item in your calculation.

Spouse's Income from Work - 2014 (Ref. 3g):*

Enter the total amount of income that the spouse earned (or will earn) from work during this time period. Include all wages, salaries, tips and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted. Do not include any amount from Federal Work-Study.

This information may be on:

- the W-2 forms,
- IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065);
- IRS Form 1040A—line 7; or
- 1040EZ—line 1.

If any individual earning item is negative, do not include that item in your calculation.

Interest Income - 2014 (Ref. 3h):*

Enter the amount of interest income received from:

- IRS Form 1040 line 8a, or
- IRS Form 1040A line 8a, or
- IRS Form 1040EZ line 2.

If you will not file an IRS tax form, enter the total amount of interest income you received in 2014.

Dividend Income - 2014 (Ref. 3i):*

Enter the amount of dividend income received from:

- IRS Form 1040 line 9a or
- IRS Form 1040A line 9a

If you will not file an IRS tax form, enter the total amount of dividend income you received in 2014.

Other Taxable Income - 2014 (Ref. 3j):*

Enter the total amount of other taxable income reported on IRS Form 1040 or 1040NR for 2014. Include alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, and social security.

Earned Income Credit - 2014 (Ref. 3k):*

Enter the amount of Earned Income Credit for 2014 from:

- IRS form 1040 line 64a, or
- 1040A line 38a, or
- 1040EZ line 8a.

Social Security Benefits - 2014 (Ref. 3m):*

Enter the amount of untaxed social security benefits (including Supplemental Security Income) received in 2014. Do not include any benefits included under "Adjusted Gross Income-2014" above. Write in the total for the year, not the monthly amounts. Include any amounts received for children.

AFDC/TANF - 2014 (Ref. 3n):*

Enter the total amount of benefits received in 2014 from Aid to Families with Dependent Children or Temporary Assistance for Needy Families. (These are usually called AFDC, ADC, or TANF benefits.) Write in the total for the year, not monthly amounts. Do not include any social security benefits here.

Child Support Received - 2014 (Ref. 3o):*

Enter the amount of child support received for all children in 2014.

Other Untaxed Income/Benefits - 2014 (Ref. 3p):*

USC applicants should enter 0 for this question and answer the more detailed questions regarding other untaxed income/benefits which follow.

Medical/Dental Expense - 2014 (Ref. 3q):*

Enter the total amount PAID in 2014 for medical and dental expenses (including insurance premiums). Do not include amounts covered by insurance, your company medical reimbursement account (flexible spending account), or self-employed health deductions from IRS form 1040. If deductions were itemized on the 2014 US income tax return, enter the amount from IRS form 1040, Schedule A, line 1.

Elementary/Junior/High School Tuition - 2014 (Ref. 3r):*

Enter the total amount of private school tuition paid in 2014 for elementary, junior high, and high school for all dependent children. (Tuition does not include room, board, books, transportation, etc.)

Number of Children's Tuition Paid - 2014 (Ref. 3s):*

Enter the number of dependent children for whom the amount given above was paid in 2014.

Child Support Paid - 2014 (Ref. 3t):*

Enter the amount of child support you paid in 2014.

Education Credits Received - 2014 (Ref. 3u):*

Enter the amount of education credits (Hope and Lifetime Learning Tax Credits) you received in 2014, from IRS form 1040 line 49, or IRS form 1040A line 31.

Taxable Income Exclusion - 2014 (Ref. 3v):*

Enter the following amounts received in 2014 ONLY IF THEY WERE INCLUDED in any of the above entries, such as Adjusted Gross Income, Earned Income, or Other Taxable Income:

- taxable Educational Financial Aid (may include earnings from Federal Work-Study, teaching/research assistantships, or other need-based work programs, and grant and scholarship aid in excess of tuition, fees, books and supplies.)
- AmeriCorps awards - allowances and benefits.
- combat pay or special combat pay received (from W-2, box 12, Code Q)
- earnings from work under a cooperative education program offered by a college

Other Untaxed Income/Benefits Breakdown (3p) - Tax Exempt Interest Income - 2014 (Ref. CST209):*

Enter the amount of tax-exempt interest income from IRS form 1040—line 8b or form 1040A—line 8b.

Untaxed IRA Distributions - 2014 (Ref. CST212):*

Enter the total amount of untaxed portions of IRA distributions from:

- IRS Form 1040 —lines (15a minus 15b) or
- IRS Form 1040A—lines (11a minus 11b)

Other Untaxed Income/Benefits Breakdown - Untaxed Pension Distribution - 2014 (Ref. CST213):*

Enter the total amount of untaxed portions of pensions from:

- IRS Form 1040—lines (16a minus 16b) or
- IRS Form 1040A—lines (12a minus 12b).

Exclude 'rollovers.'

Tax Deferred Plan Payments - 2014 (Ref. CST214):*

Enter the total amount of payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) in 2014. Include amounts reported on Forms W-2 in Boxes 12a through 12d, codes D, E, F, G, H and S. Include untaxed payments to 401 (k) and 403 (b) plans. (This amount may also be included in "Other Untaxed Income/Benefits (Ref. 3p)).

Other Untaxed Income/Benefits Breakdown (3p) - IRA/KEOGH/SEP/SIMPLE Payments - 2014 (Ref. CST215):*

Enter the total amount of IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—lines (28 + 32) or IRS Form 1040A—line 17.

Living and Housing Allowance/BAS - 2014 (Ref. CST216):*

Enter the total amount of housing, food and other living allowances paid to members of the military, clergy and others, including cash payments and cash value of benefits received in 2014. For members of the military only include basic allowance for subsistence (BAS). Do not include the value of on or off-base military housing or the value of a basic military allowance for housing (BAH). Living and housing allowance may be reported on the Form W-2. This is a breakdown of amounts collected previously in question "Other Untaxed Income/Benefits (Ref. 3p).

Military Housing Allowance (BAH) -2014 (Ref. CST217):*

Enter the total value of on-or off-base military housing or the value of a basic military allowance for housing (BAH) received in 2014. This question is a breakdown of amounts collected previously in "Other Untaxed Income/Benefits (Ref. 3p).

Veteran Non-Education Benefits - 2014 (Ref. CST218):*

Enter the total amount of veterans non-educational benefits, such as Death Pension, Disability, Dependency & Indemnity Compensation (DIC), etc. received in 2014. This question is a breakdown of amounts collected previously in question "Other Untaxed Income/Benefits (Ref. 3p).

Remaining Untaxed Income and Benefits - 2014 (Ref. CST219):*

Enter the total amount of any other 2014 untaxed income and benefits not already reported anywhere on this application, such as workers' compensation, disability, Black Lung Benefits, Refugee Assistance, untaxed portions for Railroad retirement benefits, etc. Do not include untaxed combat pay reported on Form W-2. (This amount may also be included in "Other Untaxed Income/Benefits (Ref. 3p)).

Taxable Combat Pay – 2014 (Ref. CST220):*

Enter the amount of taxable combat pay or special combat pay that was included in your adjusted gross income on your 2014 Form 1040 or 1040A because you (and/or your spouse) are commissioned officers. Do not include the untaxed portion of combat pay listed on Form W-2, box 12, Code Q. This does not apply to commissioned warrant officers.

Fuel Tax Credit - 2014 (Ref. CST221):*

Enter the amount of the Fuel Tax Credit from 2014 IRS form 1040 line 70.

Student's (and Spouse's) Assets**Cash/Savings/Checking (Ref. 6a):***

Enter the amount of money in cash, savings, and checking accounts as of today.

Home Value (Ref. 6b):*

If the student (and spouse) own a home, enter the current market value of the home. Do not use assessed, insured, or tax value. A "Home" includes a house, mobile home, condominium, etc. Renters, enter 0.

Home Debt (Ref. 6c):*

If the student (and spouse) own a home, enter the amount currently owed on the home, including the present mortgage and related debts on the home. Do not include interest due on the mortgage.

Year Home Purchased (Ref. 6d):

If the student (and spouse) own a home, enter the four digits of the year in which the home was purchased.

Home Purchase Price (Ref. 6e):*

If the student (and spouse) own a home, enter the original purchase price of the home.

Other Real Estate Value (Ref. 6f):*

Enter the current value of other real estate (including rental property, land, second or summer homes, etc.)

Other Real Estate Debt (Ref. 6g):*

Enter the amount currently owed on the other real estate.

Business Value (Ref. 6h):*

If you own a business, enter the current value of the business. Include the value of land, buildings, machinery, inventories, and equipment. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the business value.

Business Debt (Ref. 6i):*

Enter the amount currently owed on the business. Include only the present mortgage and related debts for which the business is being used as collateral. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the business debt.

Small Family Run Business (Ref. 6ia):*

Is the business which is listed here operated by your family, AND does it have fewer than 100 employees?

1. Yes
2. No

Farm Value (Ref. 6j):*

If you (and spouse) own a farm, enter the current value of the farm. Include the value of land, buildings, machinery, equipment, livestock, inventories, etc. Do not include the value of the home in this question. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the farm value.

Farm Debt (Ref. 6k):*

Enter the amount currently owed on the farm. Include only the present mortgage and related debts for which the farm is being used as collateral. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the farm debt.

Family Lives on Farm (Ref. 6m):*

Is your family living on the farm?

1. Yes
2. No

Stocks/Bonds Value (Ref. 6n):*

Enter the current value of investments such as certificates of deposit, money market funds, mutual funds, stocks, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, precious metals, etc. Do not include any amount of these investments held in retirement plans, such as pension funds, annuities, IRAs, Keogh accounts, etc.

Stocks/Bonds Debt (Ref. 6o):*

Enter any amount owed on these investments. Do not include any personal, education, consumer loans, or any debts that are not related to the assets included here.

Contingent Trusts (Ref. 6p):*

Enter the estimated value of any contingent (currently inaccessible) trust funds of which the student (and/or spouse) is the beneficiary.

Vested Trusts (Ref. 6q):*

Enter the current value of any vested (accessible) trust funds of which the student (and/or spouse) is the beneficiary.

Student/Spouse's Other Assets-Description (Ref. 6r):

Enter a description of any other student (and spouse's) assets not included above. Do not include any investments held in retirement plans, such as pension funds, annuities, IRAs, Keogh accounts, etc., or property such as cars or boats.

Student/Spouse's Other Assets - Value (Ref. 6s):*

Enter the current value of any other student (and spouse's) assets not included above. Do not include any amount of these investments held in retirement plans, such as pension funds, annuities, IRAs, Keogh accounts, etc., or property such as cars or boats.

Student/Spouse's Other Assets - Debt (Ref. 6t):*

Enter the amount currently owed on any other student (and spouse's) assets not included above. Do not include any personal or consumer loans, or any debts that are not related to the assets included here. Do not include any education loans.

Retirement Accounts Value (Ref. 6u):*

Enter the estimated value of the student's (and spouse's) retirement account(s), including IRA accounts, Keogh accounts, and employer based tax-deferred pension and savings plans such as 401(k), 403(b), and 457 plans. Include amounts from both traditional and Roth IRA accounts. If you have a Roth IRA, please also list that amount separately in the Special Circumstances section.

Cash/Savings/Checking - 9/1/2015 (Ref. 6x):*

Enter the best estimate of the amount of money which will be in the student's (and spouse's) cash, savings, and checking accounts as of September 1, 2015. Don't include any savings from earnings during the summer of 2015.

Immediate Family in Family-Run Business (Ref. CST222):

Does this family-run business employ any immediate family members? If yes, enter the other family members' relationship to you and their percent of ownership.

Business Name (Ref. CST309):

Enter the name of your business.
(If none, skip this question.)

Business Tax Return (Ref. CST310):

Select the type of tax return that was or will be used to report the income from this business in 2014. (If you or your spouse do not own a business, skip this question.)

1. Form 1040, Schedule C
2. Form 1040, Schedule C-EZ
3. Form 1040, Schedule E
4. Form 1065, U.S. Return of Partnership
5. Form 1120, U.S. Corp Income Tax
6. Form 1120S, U.S Income Tax Return
7. Foreign Tax Return

Business Number of Full-Time Employees (Ref. CST311):

Does the business employ more than 100 full-time or full-time equivalent employees?
(If you do not own a business, skip this question.)

1. Yes
2. No

Business - Student's Percent of Ownership (Ref. CST312):

Enter the student's percentage of ownership.
(If you or your spouse do not own a business, skip this question.)

Business - Spouse's Percent of Ownership (Ref. CST313):

Enter your spouse's percentage of ownership of the business.
(If you or your spouse do not own a business, skip this question.)

Business - Other Family Member's Percent Ownership (Ref. CST314):

Are there other family members with ownership in this business? Family includes (1) persons directly related to the student, such as a parent, sister or cousin, or (2) persons who are or were related to the student by marriage, such as a spouse, stepparent or sister-in-law. If yes, list their names, relationship to you, and percentage of ownership. (If you or your spouse do not own a business, skip this question.)

Business Address (Ref. CST315):

Enter the full address where this business is located.
(If you or your spouse do not own a business, skip this question.)

Additional Businesses (Ref. CST316):

If you or your spouse own or have partial ownership of more than one business, please enter the name, tax return type, number of full-time employees, yours and your spouse's total ownership percentage, business value, business debt and address for each business in this field. (If you or your spouse do not own business(es), skip this question.)

Student Applicant's Prior Financial Aid

School/College/Institution - 2014-2015 (Ref. 10h):

Enter the name of the educational institution the student applicant attended in 2014-2015. If the applicant did not attend an educational institution, leave this entry blank.

Tuition/Fees/Room & Board - 2014-2015 (Ref. 10i):*

Enter the education expenses, including tuition, fees, and room and board for the student applicant in 2014-2015.

Scholarships or Gift Aid - 2014-2015 (Ref. 10j):*

Enter the amount of any financial aid received in the form of scholarships or gift aid by the student applicant in 2014-2015.

Loans and Employment - 2014-2015 (Ref. 10k):*

Enter the amount of any financial aid received in the form of loans or employment by the student applicant in 2014-2015.

Assistance from Parents – Last Year in School (Ref. 10m):*

Enter the amount of any education financial assistance received by the student applicant from the parents for the most recent year that the student attended college. Please respond to this item even if several years have passed since the student attended college.

Other Student Household Members

Other Student Household Member 1

Give information for up to 6 family members that the student financially supports. The number of family members that we ask about is based on the answer in Step 3 - Student Information. Do not give information for the student.

Name (Ref. 11a):*

Enter the name of the student's/spouse's household member.

Age (Ref. 11b):*

Enter the age of the student's/spouse's household member as of today.

Relationship to Student (Ref. 11c):*

Select the entry which best describes the household member's relationship to the student.

1. Student's parent/stepparent
2. Student's brother/sister
3. Student's spouse
4. Student's son/daughter
5. Student's grandparent
6. Other

For each additional household member, follow the instructions provided for items 11a, 11b, and 11c. This applies to the questions for household members 2 through 8, with question numbers 12a through 18c.

Other Student Household Member 2 (Ref. 12a, 12b, 12c)

Other Student Household Member 3 (Ref. 13a, 13b, 13c)

Other Student Household Member 4 (Ref. 14a, 14b, 14c)

Other Student Household Member 5 (Ref 15a, 15b, 15c)

Other Student Household Member 6 (Ref. 16a, 16b, 16c)

Other Student Household Member 7 (Ref. 17a, 17b, 17c)

Other Student Household Member 8 (Ref. 18a, 18b, 18c)

Name of School/College in 2015-2016 (Ref. CST319):

Enter the name of the educational institution the household member will be attending during the 2015-2016 academic year. If none, enter n/a.

School/College/Institution Type in 2015-2016 (Ref. CST320):

Select the type of school/college/institution the household member will be attending during the 2015-2016 academic year. If none, skip this question.

1. Public Elem/Jr/Secondary/High School
2. Private Elem/Jr/Secondary/ High School
3. Public 2-year College
4. Public 4-year College
5. Private 2-year College
6. Private 4-year College
7. Graduate/post-grad/professional
8. Proprietary School
9. Unknown

School/College/Institution Tuition 2015-2016 (Ref. CST321):

Enter the expected amount of tuition and fees to be paid for this institution in 2015-2016 academic year. Do not include any financial aid or scholarships received. If none, skip this question.

Student's (and Spouse's) Other Resources

Student's Outside Scholarships/Grants for Academic Year 2015-2016 (Ref. 25a):*

Enter the total amount of financial aid expected from nonfederal scholarships, fellowships, and grants from outside organizations or sources other than schools who will be receiving this application. Do not include resources listed elsewhere in this application. Do not include student loans. List the sources and amounts of these in the Special Circumstances section.

Financial Assistance from Parents

Assistance for Academic Year 2014-2015 (Ref. 25b):*

Enter here the amount of education financial assistance expected and/or received from the student's parents for the 2014-2015 academic year.

Gift or Loan (Ref. 25bt):*

For the financial assistance listed in the previous question, is the assistance in form of a Gift (does not have to be repaid) or Loan (has to be repaid)?

1. Gift
2. Loan

Assistance for Academic Year 2015-2016 (Ref. 25c):*

Enter here the amount of education financial assistance expected and/or received from the student's parents for the 2015-2016 academic year.

Gift or Loan (Ref. 25ct):*

For the financial assistance listed in the previous question, is the assistance in form of a Gift (does not have to be repaid) or Loan (has to be repaid)?

1. Gift
2. Loan

Other Financial Assistance

Assistance for Academic Year 2014-2015 (Ref. 25d):*

Enter the amount of financial assistance expected and/or received from relatives other than the student's parents. Include any assistance from the spouse's parents, and from all other sources for the 2014-2015 academic year.

Source of Other Assistance 2014-2015 (Ref. 25dd):*

Enter a description of the source of the financial assistance listed in the previous question.

Gift or Loan (Ref. 25dt):*

For the financial assistance listed in the previous question, is the assistance in form of a Gift (does not have to be repaid) or Loan (has to be repaid)?

1. Gift
2. Loan

Assistance for Academic Year 2015-2016 (Ref. 25e):*

Enter the amount of financial assistance expected and/or received from relatives other than the student's parents. Include any assistance from the spouse's parents, and from all other sources for the 2015-2016 academic year.

Source of Other Assistance 2015-2016 (Ref. 25ed):*

Enter a description of the source of the financial assistance listed in the previous question.

Gift or Loan (Ref. 25et):*

For the financial assistance listed in the previous question, is the assistance in form of a Gift (does not have to be repaid) or Loan (has to be repaid)?

1. Gift
2. Loan

Student's Special Circumstances

Student's Special Circumstances (Ref. 29)

This section is not required of you to complete. Enter any special circumstance that you wish your school(s) to consider in their assessment of your application. If you do choose to add an explanation of your special circumstance, the financial aid administrator at the schools you applied to may take your explanation into consideration.