

2014 – 2015 WASFA Parent Information Worksheet Instructions

This worksheet represents the standard questions that are asked on the Need Access application. When you log in to complete the application online, you may see additional questions chosen by your institution(s) 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.

Parent 1 Information

Parent 1 Name - Enter the name of your main supporting parent or parent who most recently provided the greatest financial support (Ref. 31c):*

Enter this parent's name. The main supporting parent is defined as the parent or guardian who the student lived with the most during the last 12 months. If the student didn't live with either parent or guardian more than the other in the last 12 months, it is the parent or guardian that provided the most financial support during that time. If neither parent provided greater support during the last 12 months, it is the parent or guardian who most recently provided the greatest financial support.

Date of Birth (Ref. 31cm):*

Enter this parent's birth date. Example: 10/31/1960

Street (Ref. 31d):*

Enter the street address for the parent's home.

City (Ref. 31e):*

Enter the city of this parent's home address.

State (Ref. 31f):

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

Zip Code (Ref. 31g):

Enter the zip code of this parent's home address.

Territory/Country (Ref. 31h):

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

Parent 1 E-mail Address (Ref. c237pf):

Enter this parent's e-mail address. Example:
name@domain.com

Current Marital Status of Parent 1 (Ref. 32v):*

Select the current marital status of the parent whose information you listed above as Parent 1.

1. Single
2. Married/unmarried and both parents living together
3. Separated
4. Divorced
5. Widowed

Occupation (Ref. 31i):*

Enter this parent's occupation. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Job Title (Ref. 31j):*

Enter this parent's job title. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Employer (Ref. 31k):

Enter the employer of this parent.

Number of Years with this Employer (Ref. 31m):

Enter the number of years this parent has been employed by this employer. If employed less than one year, enter 0.

Parent 2 Information

Parent 2 Name - Enter the name of Parent 1's spouse, or, if unmarried and both parents live together, then enter the name of the student's other legal parent. (Ref. 32c):*

Enter this parent's name.

Relationship to Student (Ref. 32b):*

Select the entry corresponding to the relationship of the appropriate parent to the student.

1. Parent
2. Stepparent
3. Guardian
4. None

Date of Birth (Ref. 32cm):*

Enter this parent's birth date. Example: 11/27/1967

Street (Ref. 32d):*

Enter the street address for the parent's home.

City (Ref. 32e):*

Enter the city of this parent's home address.

State (Ref. 32f):

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

Zip Code (Ref. 32g):

Enter the zip code of this parent's home address.

Territory/Country (Ref. 32h):

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

Parent 2 E-mail Address (Ref. c237pm):

Enter this parent's e-mail address. Example:
name@domain.com

Occupation (Ref. 32i):*

Enter this parent's occupation. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Job Title (Ref. 32j):*

Enter this parent's job title. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Employer (Ref. 32k):

Enter the employer of this parent.

Number of Years with this Employer (Ref. 32m):

Enter the number of years this parent has been employed by this employer. If employed less than one year, enter 0.

Parents' Household Information**Phone Number (Ref. 32p):***

Enter the parents' phone number. Example: 555-555-1212

Parent Last Claimed Student as Dependent (Ref. 32qp):*

Enter the name of the parent who most recently claimed the student applicant as a tax dependent.

Last Year Claimed (Ref. 32qy):*

Enter the four digits of the year in which the student applicant was most recently claimed by a parent as a tax dependent. (If the parents never filed U.S. income 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.)

Parents' Release of Financial Data (Ref. 32r):*

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

1. Yes
2. No

Number of Family Members Financially Supported by Parents – Including Student Applicant (Ref. 32s):*

Enter the number of people that the parent(s) will financially support between July 1, 2014 and June 30, 2015.

Include parent(s), and ALWAYS INCLUDE the student applicant, even if the student applicant does not physically live with the parent(s) and/or is not currently supported by the parent(s).

Include other people only if they live with and get more than half their support from the parents and will continue to get this support between July 1, 2014, and June 30, 2015. (If you include anyone other than the parent(s) and student applicant, you must list them in the Parents' Other Household Members Section.)

Support includes money, gifts, loans, housing, food, clothes, vehicle, medical and dental care, payment of college costs, etc. If the student completes this section for the parents, be sure not to include any dependents of the student. This question is for dependents of the parents only.

Here are a couple of examples:

- 2 people: one parent (single/ divorced/ separated/widowed) and student applicant
- 3 people: 2 married parents and student applicant
- 4 people: 2 married parents, student applicant, and 1 other child

Number in College – Including Student Applicant (Ref. 32t):*

Enter the number of people in the parents' household, INCLUDING the STUDENT APPLICANT, who will be attending college, graduate/professional school, or other school beyond the high school level between July 1, 2014, and June 30, 2015, and who will be enrolled at least half time.

Federal Benefits Received in 2012 or 2013 (Ref. 32tt):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2012 or 2013 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.

Number of Parents in College (Ref. 32u):*

How many of the student applicant's parents will be attending college at least half time in 2014-2015?

0. None
1. One
2. Two

Date of Divorce/Separation - Month (Ref. 32wm):

If the student applicant's natural parents are divorced or separated, enter the number of the month the parents were divorced or separated.

Date of Divorce/Separation - Year (Ref. 32wy):

If the student applicant's natural parents are divorced or separated, enter the four digit year the parents were divorced or separated.

Date of Remarriage - Month (Ref. 32wrm):

If the parent completing this portion of the application has divorced the student applicant's other natural parent and remarried, enter the number of the month of the remarriage.

Date of Remarriage - Year (Ref. 32wry):

If the parent completing this portion of the application has divorced the student applicant's other natural parent and remarried, enter the four digit year of the remarriage.

State of Legal Residence (Ref. 32x):

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

Parents Living Abroad (Ref. c20p):*

Are the student applicant's parents living abroad? If yes, U.S. citizens and permanent residents with parents living abroad and having foreign earned income or assets should provide details in the Special Circumstances section.

1. Yes
2. No

Income from non-U.S. Sources in 2013 (Ref. 32z):*

Are the parents non-U.S. citizens whose income in 2013 came primarily from non-U.S. sources?

1. Yes
2. No

Parents' Income and Expenses - 2013**Source of Following U.S. Tax Figures (Ref. 33a):***

Select the entry corresponding to the source of 2013 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 - 2013 (Ref. 33b):*

Enter number of exemptions claimed for 2013 from:

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

If your parents used the 1040EZ and checked either the "you" or "spouse" box on line 5, use the 1040EZ worksheet line F to determine the number of exemptions (\$3,700 equals one exemption). If a person didn't check either box on line 5, enter "01" if the parent is single or "02" if the parents are married.

Adjusted Gross Income - 2013 (Ref. 33c):*

Enter 2013 adjusted gross income from:

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

Itemized Deductions - 2013 (Ref. 33d):*

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 - 2013 (Ref. 33e):*

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.

Parent 1's Earned Income - 2013 (Ref. 33f):*

Enter the amount of income earned from work by Parent 1 during this time period. Include wages, salaries, tips and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted.

Parent 2's Earned Income - 2013 (Ref. 33g):*

Enter the amount of income earned from work by Parent 2 during this time period. Include wages, salaries, tips and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted.

Interest Income - 2013 (Ref. 33h):*

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 2013.

Dividend Income - 2013 (Ref. 33i):*

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 2013.

Other Taxable Income - 2013 (Ref. 33j):*

Enter the total amount of other taxable income reported on IRS Form 1040 or 1040NR for 2013. Include alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, and social security.

Earned Income Credit - 2013 (Ref. 33k):*

Enter the amount of Earned Income Credit for 2013 from:

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

Social Security Benefits - 2013 (Ref. 33m):*

Enter the amount of untaxed social security benefits (including Supplemental Security Income) received in 2013. Do not include any benefits included under "Adjusted Gross Income-2013" above. Write in the total for the year, not the monthly amounts. Include any amounts received for children.

AFDC/TANF - 2013 (Ref. 33n):*

Enter the total amount of benefits received in 2013 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 the monthly amounts. Do not include any social security benefits here.

Child Support Received - 2013 (Ref. 33o):*

Enter the amount of child support received for all children in 2013.

Other Untaxed Income/Benefits - 2013 (Ref. 33p):*

Enter the total amount of untaxed income and benefits received in 2013. Include the following:

- tax-exempt interest income from IRS form 1040—line 8b or 1040A—line 8b
- untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b)
- untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b)
- payments to tax-deferred pension and savings plans (paid directly or withheld from earnings). Include untaxed portions of 401(k) and 403(b). (Check your W-2.)
- IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—lines (28 + 32) or 1040A—line 17
- Housing, food and other living allowances paid to members of the military, clergy and others, including

cash payments and cash value of benefits, excluding the value of on-base military housing or the value of a basic military allowance for housing

- Veterans non-educational benefits, such as Death Pension, Disability, Dependency & Indemnity Compensation (DIC), etc.
- Cash support or other money paid on the student's behalf, not reported elsewhere in this application
- Any other untaxed income and benefits, such as workers' compensation, disability, etc. Include the first-time homebuyer credit from IRS Form 1040—line 67

Do not include any of the following items:

- Untaxed Social Security Benefits
- Welfare payments, SSI, or food stamps
- Money from student financial aid
- Foreign income exclusion
- Rollover pensions or IRAs
- Any income reported elsewhere in this application.

Medical/Dental Expense - 2013 (Ref. 33q):*

Enter the total amount PAID in 2013 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 2013 US income tax return, enter the amount from IRS form 1040, Schedule A, line 1.

Elementary/Junior/High School Tuition - 2013 (Ref. 33r):*

Enter the total amount of tuition paid in 2013 for elementary, junior high, and high school tuition for all children. (Tuition does not include room, board, books, transportation, etc.)

Number of Children's Tuition Paid - 2013 (Ref. 33s):*

Enter the number of dependent children for whom the amount given above was paid in 2013.

Child Support Paid - 2013 (Ref. 33t):*

Enter the amount of child support you paid in 2013.

Education Credits Received - 2013 (Ref. 33u):*

Enter the amount of education credits (Hope and Lifetime Learning Tax Credits) you received in 2013, from IRS form 1040 line 49, or IRS form 1040A line 31.

Taxable Income Exclusion - 2013 (Ref. 33v):*

Enter the following amounts received in 2013, 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 received in 2013 (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

Parents' Assets**Cash/Savings/Checking (Ref. 36a):***

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

Home Value (Ref. 36b):*

If the parents 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. 36c):*

If the parents 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 of Purchase of Home (Ref. 36d):*

If the parents own a home, enter the 4 digits of the year in which the home was purchased.

Purchase Price of Home (Ref. 36e):*

If the parents own a home, enter the original purchase price of the home.

Other Real Estate Value (Ref. 36f):*

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

Other Real Estate Debt (Ref. 36g):*

Enter the amount currently owed on the other real estate.

Investments Value (Ref. 36h):*

Enter the current value of parents' investments, including trust funds, 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.

Investment Debt (Ref. 36i):*

Enter any amount owed on these investments. 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.

Business Value (Ref. 36j):*

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. 36k):*

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. 36ka):*

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. 36m):*

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. 36n):*

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. 36o):*

Is your family living on the farm?

1. Yes
2. No

Retirement Accounts Value (Ref. 36p):*

Enter the current value of parents' retirement accounts, 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. Please list the type of retirement plan and the current value for each parent in the Special Circumstances section.