

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.

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

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. 2014
2. 2015
3. 2016
4. 2017
5. 2018
6. 2019 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.)

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 2014-2015 academic year?

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

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

Will the student and spouse (or prospective spouse) maintain separate households during the summer of 2014?

1. Yes
2. No

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

Will the student and spouse (or prospective spouse) maintain separate households during the 2014-2015 academic year?

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, 2014, and June 30, 2015. 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 2012 or 2013 (Ref. 2t):*

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.

Income from non-U.S. Sources in 2013 (Ref. 2z):*

Are you a non-U.S. citizen whose income in 2013 came primarily from non-U.S. sources?

1. Yes
2. No

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, 2014 and June 30, 2015, 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, 2015?

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, 2013, 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 2014 - 2015(Ref. CST044):*

Where do you intend to reside during the 2014 - 2015 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

Student's (and Spouse's) Annual Income and Expenses - 2013**Source of Following U.S. Tax Figures (Ref. 3a):***

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. 3b):*

Enter the number of exemptions claimed for 2013 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 (\$3,700 equals one exemption). If a person didn't check either box on line 5, enter 01 if he or she is single, or 02 if he or she is married.

Adjusted Gross Income - 2013 (Ref. 3c):*

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. 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 - 2013 (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 - 2013 (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 - 2013 (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 - 2013 (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 2013.

Dividend Income - 2013 (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 2013.

Other Taxable Income - 2013 (Ref. 3j):*

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. 3k):*

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. 3m):*

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. 3n):*

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 monthly amounts. Do not include any social security benefits here.

Child Support Received - 2013 (Ref. 3o):*

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

Other Untaxed Income/Benefits - 2013 (Ref. 3p):*

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.
- Gifts and support, other than money, received from friends and relatives.

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. 3q):*

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. 3r):*

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. 3s):*

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

Child Support Paid - 2013 (Ref. 3t):*

Enter the amount of child support you paid in 2013.

Education Credits Received - 2013 (Ref. 3u):*

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. 3v):*

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 (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).

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 - 9/1/2014 (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, 2014. Don't include any savings from earnings during the summer of 2014.

Additional School Specific Questions**High School Name (Ref. CST325):***

Enter the name of the high school from which you have or will graduate. If you did not graduate from a high school, list none.

High School City (Ref. CST326):*

Enter the name of the city where the high school from which you have or will graduate is located. If you did not graduate from a high school, list none.

High School State (Ref. CST327):*

Select the state where the high school from which you have or will graduate is located. If you did not graduate from a high school, list none.

Washington Residency Certification – Option A (WA High School Graduate) (Ref. CST328):*

To be eligible for Washington in-state tuition rates at public institutions and/or to be considered for Washington State Need Grant funds at a participating school as a non-U.S. Citizen you must certify that you have met or will meet one of two sets of conditions by the time you begin college.

Select Yes to certify that all of the following conditions apply to you (or will apply by the time you begin college):

Resided in Washington State for three years immediately prior to receiving a high school diploma, completed the full senior year at a Washington high school and have continuously resided in the State since earning the high school diploma.

Select No if these conditions do not apply to you (or will not by the time you begin college).

1. Yes, I meet conditions
2. No, I don't meet conditions

Washington Residency Certification – Option B (High School Equivalent) (Ref. CST329):*

To be eligible for Washington in-state tuition rates at public institutions and/or to be considered for Washington State Need Grant funds at a participating school as a non-U.S. Citizen you must certify that you have met or will meet one of two sets of conditions by the time you begin college.

Select Yes to certify that all of the following conditions apply to you (or will apply by the time you begin college):

Completed the equivalent of a high school diploma, resided in Washington State for the three years immediately before receiving the equivalent of the diploma and continuously resided in the State since earning the high school equivalent.

Select No if these conditions do not apply to you (or will not by the time you begin college).

1. Yes, I meet conditions
2. No, I don't meet conditions

Certification Regarding Permanent Residency Application and Related Responsibilities (Ref. CST330):*

In addition to residency requirements, to be eligible for Washington in-state tuition rates and/or to be considered for Washington State Need Grant funds as a non-U.S. Citizen you must certify that:

I will file an application to become a permanent resident of the United States as soon as I am eligible to apply. I am also willing to engage in activities designed to prepare me for citizenship, including citizenship and civics review courses.

1. Yes, I certify
2. No

Student Certification and Electronic Signature (Ref. CST331):*

The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature. To certify your application, read the text below and provide an electronic signature by typing your name in the answer field.

I certify or declare under penalty of perjury under the laws of the State of Washington that the foregoing information is true and correct. By typing my full legal name I provide my electronic signature.

Place (City and State) Where Electronic Signature Was Completed (Ref. CST332):*

The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature. Enter the place – city and state - where you electronically signed the certification referenced in question number CST331.

Date Electronic Signature Was Completed (Ref. CST333):*

The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature. Enter the date you electronically signed the certification referenced in question number CST331.