

# Application Instructions/Checklist Office of University Financial Aid

**This checklist is for your convenience only and should not be submitted.**

**Please note that it is the student's responsibility to provide to the Office of University Financial Aid all the information/documents required for the preparation of a financial aid award.**

### All students must submit:

1.  *Free Application For Federal Student Aid (FAFSA)* to the Federal processor, or;  
 *FAFSA or Renewal FAFSA on the Web* at: <http://www.fafsa.ed.gov> ..... Date submitted \_\_\_\_\_

*For dependent students whose parents are separated or divorced, the custodial parent must complete the FAFSA or Renewal FAFSA. The non-custodial parent must complete a Non-Custodial Parent's Statement, available from the Office of University Financial Aid. .... Date submitted \_\_\_\_\_*

2.  *CWRU Financial Aid Application*. .... Date submitted \_\_\_\_\_
3.  Student's (& spouse's) **signed** 2001 federal tax return(s) and W-2(s) (include **all** federal tax schedules and forms) or *Student/Spouse Statement of 2001 Income\** and W-2 form(s) ..... Date submitted \_\_\_\_\_
4.  *Verification Form* (will be sent to applicants selected by the U.S. Dept. of Education after CWRU receives results from the FAFSA) ..... Date submitted \_\_\_\_\_

### Additional requirements for undergraduate students

5.  *CSS/Financial Aid Profile®* form to College Scholarship Service.  
(Required for 1<sup>st</sup> year and Binary/Transfer students) ..... Date submitted \_\_\_\_\_
6.  Parents' **signed** 2001 federal tax return(s) and W-2(s) (include **all** federal tax schedules and forms) or *Non-Filer Verification Statement\** and W-2 form(s) (*for dependent students only*). ..... Date submitted \_\_\_\_\_

\* Substitution for the Internal Revenue Service Tax Form may be made only when a Federal Tax Return **will not be filed**. If you have filed but do not have a copy of your tax return, contact the IRS to request IRS Form 1722 (1-800-829-1040).

**Tax returns must include all W-2(s), schedules and forms and signature(s) of filer(s). List student's name, social security number, and school within the University at the top of the tax returns for identification purposes.**

### Additional requirements for graduate/professional students

7. A *Memo of Assistance* or contract from school (excluding School of Dentistry) or department indicating projected credit hours and departmental assistance. This memo is forwarded to the Office of University Financial Aid by your school or department after you have been admitted.
8.  Students enrolled in the **School of Dentistry** should provide full parental information on the FAFSA and the Verification Form, and submit a copy of parents' 2001 Federal Tax Return for consideration of funding through the Department of Health and Human Services. .... Date submitted \_\_\_\_\_

### Other Required Documents (where applicable)

9.  Financial Aid Transcript(s) for students enrolled in the School of Nursing or Dentistry who were previously enrolled in a health professions program ..... Date submitted \_\_\_\_\_
10.  All loan applications/Promissory Notes for Federal Stafford/PLUS Loans, Federal Direct Loans, Perkins Loan, private loans for which the student and/or parent(s) intend to apply. .... Date submitted \_\_\_\_\_
11.  A photocopy of the applicant's Alien Registration card, if the applicant is not a U.S. Citizen. .... Date submitted \_\_\_\_\_
12.  If requested, a copy of the student's Social Security card, Selective Service registration, or proof of U.S. Citizenship. .... Date submitted \_\_\_\_\_
13. **It is strongly recommended that students submit the original or photocopy of the blue Student Aid Report (SAR) for 2002—2003.**

# Application Instructions/Checklist Office of University Financial Aid

This packet contains the financial aid application forms  
for the 2002—2003 academic year

## Free Application for Federal Student Aid (FAFSA) or FAFSA on the Web

- List Case Western Reserve University and your school of enrollment in Step Six to authorize release of information.
- Use the individual school codes listed below:

Undergraduate (UG, CE, AS, NS, WS) .....	003137
School of Dentistry .....	E00078
Weatherhead School of Management (MBA, M.Acc., MNO) .....	E00080
School of Law .....	E00082
Nursing Graduate (ND, MSN, Ph.D.) .....	E00083
Mandel School of Applied Social Science .....	E00084
School of Graduate Studies - Engineering .....	E00680
School of Graduate Studies - Arts & Science.....	E00681

- The date and signature questions (98 & 99) must be completed by the student and one parent (if the student is dependent).
- If the applicant is married when the FAFSA is completed, financial information on the spouse is required even if the applicant was not married in 2001.
- Make a photocopy of the FAFSA for your records before mailing it in the enclosed pre-addressed envelope to the Federal Student Aid Programs.
- You may also submit the FAFSA electronically via FAFSA on the Web at <http://fafsa.ed.gov>.
- See our Website at <http://finaid.cwru.edu> for additional information and a link to FAFSA On The Web.

## CSS/Financial Aid Profile® Form

- First year students are required to complete the CSS/Financial Aid Profile® Form. Mail the completed form and required payment to the College Scholarship Service in the pre-addressed envelope provided.
- The Profile Form is also required for Binary/Transfer students
- List CWRU's code number (1105).
- The Profile Form is not required for returning undergraduate, graduate or professional students.

## Other Forms

- Complete the remainder of the application forms and return them to the Office of University Financial Aid at the address below along with **signed** copies of the student's (and spouse's) 2001 Federal Income Tax Returns (including **all** W-2(s), schedules and forms).
- If the student is dependent, we require **signed** copies of the parents' 2001 Federal Income Tax Return(s) (including **all** W-2(s), schedules and forms).
- Please list the student's name, social security number, and school within the University at the top of each tax and W-2 form.
- **DUE DATE FOR ALL FORMS IS APRIL 30, 2002.**
- If an applicant is selected for verification by the U.S. Department of Education, the Office of University Financial Aid will send a *Verification Form* upon receipt of the official results from the FAFSA.
- Students who file a FAFSA, paper or electronic, for 2002-2003 and whose social security numbers are confirmed by the Social Security Administration will automatically receive a Personal Identification Number (PIN) in the mail.
- Students may use this PIN to correct most information on the FAFSA and access information on their Federal educational loans.
- FAFSA information submitted with an incorrect Social Security number must be refiled as a new FAFSA with the correct number; **you can not use the PIN to correct an incorrect Social Security number.**
- Contact the Office of University Financial Aid at the phone number below or visit our web page at <http://finaid.cwru.edu> for any questions.
- See reverse side of this form for an application checklist.

Please Return All Completed Forms (except FAFSA & CSS Profile) To:

Case Western Reserve University  
Office of University Financial Aid  
10900 Euclid Avenue  
Cleveland, OH 44106-7049

voice: 216-368-4530  
fax: 216-368-5054  
<http://finaid.cwru.edu>