### Application Instructions/Checklist 2015 – 2016

**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 CWRU documents may be downloaded from http://financialaid.case.edu

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#### All students must submit:

1. **2015 – 2016 Free Application For Federal Student Aid (FAFSA) on the Web or Renewal FAFSA on the Web** at: http://www.fafsa.gov ........................................ Date submitted ____________

   *For dependent students whose parents are separated or divorced,* the custodial parent and current spouse, if applicable, must complete the FAFSA or Renewal FAFSA.

2. **Online CWRU Financial Aid Application** at http://financialaid.case.edu/myfinancialaid.aspx ........ Date submitted ____________

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#### Additional requirements for undergraduate students who are selected for Verification

When a student’s FAFSA is selected for verification, the Department of Education requires that the student and parent(s) use the IRS Data Retrieval Tool on the FAFSA on the Web site (www.fafsa.gov) to transfer tax related figures from the completed 2014 tax return on the IRS website to the FAFSA. If unable to use the Data Retrieval tool, the student and parent(s) must request a 2014 Federal Tax Return Transcript from the IRS. This document is immediately available to the tax filer who forwards the form to CWRU. The transcript may be requested approximately 10 days after filing the 2014 Federal Tax Return electronically or approximately eight weeks after mailing a paper return to the IRS.

3. **Verification Form:** Applicants will be notified if required. Selection is determined by the U.S. Dept. of Education or by the Office of University Financial Aid after results are received from the FAFSA. ........ Date submitted ____________

4. **Student’s (& spouse’s) 2014 Federal Tax Return Transcript from the IRS and all W-2(s) or Student/Spouse Affidavit of 2014 Income** and W-2 form(s) ........................................ Date submitted ____________

5. **Parents’ 2014 Federal Tax Return Transcript from the IRS and W-2(s) or 2014 Non-Filer Verification Statement** and W-2 form(s) (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, contact the IRS at 1-800-908-9946 to request a 2014 Federal Tax Return Transcript. Transcripts may be ordered online at www.irs.gov under “Order a Return or Account Transcript” on the home page.

   Tax transcripts should be accompanied by all W-2 forms received by each family member. List student’s name and SIS Student ID number at the top of the tax documents for identification purposes.

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#### Additional requirement for graduate/professional students

6. **A Memo of Assistance** from school (excluding School of Dental Medicine) 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.

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#### Other Required Documents (where applicable)

7. **Financial Aid Transcript(s) for students enrolled in the School of Nursing or Dental Medicine who were previously enrolled in a health professions program** ....................... Date submitted ____________

8. **All loan applications/Promissory Notes for Federal Direct/PLUS Loans, Perkins Loan, or private loans for which the student and/or parent(s) intend to apply. Students and/or parents should notify the Office of University Financial Aid of the name of the lender through which they will borrow any private loan funds so that the application may be located and certified** ........ Date submitted ____________

9. **A photocopy of the applicant’s Alien Registration card, if the applicant is not a U.S. Citizen** ........ Date submitted ____________

10. **If requested, a copy of the student’s Social Security card, Selective Service registration or proof of U.S. Citizenship** ................................................................. Date submitted ____________
Free Application for Federal Student Aid (FAFSA on the Web)

- Submit the FAFSA electronically via FAFSA on the Web at http://www.fafsa.gov.
- To sign the FAFSA electronically, both you and one parent (if you are dependant) will each need a separate Personal Identification Number (PIN). You can apply for a PIN at www.pin.ed.gov.
- List Case Western Reserve University as your school of enrollment in Step 6 to authorize release of information.
- Use the individual school codes listed below:
  
<table>
<thead>
<tr>
<th>School Name</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate (UG, CE, AS, NS, WS)</td>
<td>003137</td>
</tr>
<tr>
<td>School of Dental Medicine</td>
<td>E00078</td>
</tr>
<tr>
<td>Weatherhead School of Management (MBA, M.Acc., MNO)</td>
<td>E00080</td>
</tr>
<tr>
<td>School of Law</td>
<td>E00082</td>
</tr>
<tr>
<td>Nursing Graduate (DNP, M. N., MSN, Ph.D.)</td>
<td>E00083</td>
</tr>
<tr>
<td>Mandel School of Applied Social Science</td>
<td>E00084</td>
</tr>
<tr>
<td>School of Graduate Studies - Engineering</td>
<td>E00680</td>
</tr>
<tr>
<td>School of Graduate Studies - Arts &amp; Science</td>
<td>E00681</td>
</tr>
</tbody>
</table>

- If the applicant was married at the time the FAFSA is completed, the financial information of the spouse is required even if the applicant was not married in 2014.
- Visit our Website at http://financialaid.case.edu for additional information and a link to FAFSA On The Web.

Other Requirements

- In addition, students chosen for verification must submit a 2014 Federal Tax Return Transcript (including all W-2s) or utilize the IRS Data Retrieval Tool at www.fafsa.gov;
  
  If the student is dependent, we require the parents’ 2014 Federal Tax Return Transcript (including all W-2s).
- Please list the student’s name and SIS Student ID number at the top of each tax transcript and W-2 form.
- If an applicant is selected for verification by the U.S. Department of Education, the Office of University Financial Aid will send an email notification of the additional document requirements.

Other Information

- DUE DATE FOR ALL FORMS IS May 15, 2015. Applications submitted after this date may receive reduced institutional aid.
- A student who files an electronic FAFSA for 2015–2016 will receive a Personal Identification Number (PIN) in real time. Upon confirmation of the student’s data by the Social Security Administration, the PIN will become permanent.
- A student 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 refilled 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 send us an e-mail at: financialaid@case.edu
- See reverse side of this form for an application checklist.

If you have questions, please contact us at:

Case Western Reserve University
Office of University Financial Aid

voice: 216-368-4530

financialaid@case.edu