



FINANCIAL AID ITEM CLARIFICATION FORM (PARENT)

Student Information

LAST NAME	FIRST NAME	MI	SIS/PeopleSoft Student ID						DATE OF BIRTH

Instructions:

FIRST-YEAR AND TRANSFER APPLICANTS: Please complete the item requested and upload the signed form via the admission portal checklist. **Case Western Reserve University does not utilize the IDOC system through College Board.**

CURRENT CWRU STUDENTS: Please upload the completed form online by logging into the My Financial Aid Portal, clicking on the menu in the upper left corner, clicking on the Documents & Messages option and locate the **Financial Aid Item Clarification (Parent)** upload.

If you have any questions, please feel free to contact us at financialaid@case.edu or call 216-368-4530 or 800-945-4530.

Document Name: Financial Aid Item Clarification (Parent)

Financial Aid Item Clarification

Due to conflicting information, the Office of University Financial Aid requires clarification of one or more items from your financial aid application(s). Before we can determine your eligibility for student aid, please clarify the items requested. **Please only complete the sections of this form that have been requested of you.**

A. How many people are in your parents' household?		
Include: yourself, even if you don't live with your parents, the parent(s) with whom you live, your parents' other children (even if they do not live with your parents) if (a) your parents will provide more than half of their support between July 1, 2022 and June 30, 2023, or (b) the children could answer "No" to every question in Step Three of the FAFSA, and other people only if they now live with your parents, your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.		
Name	Age	Relationship to Student

B. How many people in your parents' household (from section A) will be college students between July 1, 2022 and June 30, 2023?		
Always count yourself as a college student. Do not include your parents. Do not include siblings who are in U.S. military service academies. You may include others only if they will attend, at least half-time in 2022-2023, a program in the U.S. that leads to a college degree or certificate.		
Name	College/University Name	Year in School

C. How much did your custodial parent(s) earn in 2020?	
Answer the questions whether or not a tax return was filed. This information may be on a W-2 form or on a Form 1040: line 1 + (Schedule 1 lines 3 + 6) + (Schedule K-1, Box 14, Code A). If any individual earning item is negative, do not include that item in your calculation.	Parent 1: Parent 2:

D. How much child support did your custodial parent receive in 2020?	
Include child support received for any of your parent's children. Don't include foster care or adoption payments.	Answer:

E. How much child support did your custodial parent pay in 2020?	
Include child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your custodial parent's household.	Answer:

F. How much untaxed income did your custodial parent receive in 2020?	
Include income such as worker's compensation, disability benefits, untaxed foreign income, and untaxed portions of health savings accounts from IRS Form 1040, Schedule 1, line 12.	Answer: Source of Untaxed Income::

G. How much of your custodial parent's 2020 taxable income was taxable college grants and scholarships?	
Your parents' taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships..	Answer:
H. How much did your custodial parent(s) receive in housing, food or other allowances in 2020?	
Only include housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.	Answer:
I. How much did your custodial parent(s) receive in veteran noneducational benefits in 2020?	
Veterans noneducation benefits include Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	Answer:
J. How much of your custodial parent's 2020 untaxed IRA or pension distribution <i>was a rollover</i> into another qualified retirement account?	
Untaxed portion of IRA distribution or pension from IRS Form 1040—(lines 4a + 5a) minus (Lines 4b + 5b) that was a rollover .	Answer:
K. How much of your custodial parent's 2020 taxable income was from need-based employment programs?	
Need-based employment programs include Federal Work-Study and need-based employment portions of fellowships and assistantships.	Answer:
L. How much of your custodial parent's 2020 taxable income was from a cooperative education program?	
Only include earnings from work under a cooperative education program offered by a college	Answer:
M. How much of your custodial parent's 2020 taxable income was combat pay or special combat pay?	
Only include the amount of combat pay that was taxable and included in your adjusted gross income.	Answer:

I certify that all of the information provided on this form and on the Free Application for Federal Student Aid (FAFSA) is true and complete to the best of my knowledge. I understand that if I purposely give false or misleading information on this form, or on the FAFSA, I may be subject to a \$20,000 fine, a prison sentence or both. ***Electronic signatures are not accepted.***

Student's signature

Date

Parent's signature

Date