



## REMINDERS!

- All application materials must be completed and submitted by April 15.
- You must maintain satisfactory academic progress to maintain aid eligibility.
- Changes to your household size and number of siblings in college will affect your eligibility.
- The Change of Financial Circumstance Form can be submitted along with your application.



# 2014-2015 UPPERCLASS FINANCIAL AID CHECKLIST<sup>1</sup>

All application materials are due to our office by April 15, 2014.

- Complete the 2014-2015 CSS/Financial Aid PROFILE<sup>®</sup>**  
Complete online at <https://profileonline.collegeboard.com> (School code: 2365)
- Complete the 2014-2015 Free Application for Federal Student Aid (FAFSA)**  
Complete online at [www.fafsa.ed.gov](http://www.fafsa.ed.gov) (School code: 003289)
- Complete and submit the 2014-2015 Lehigh University Application for Financial Aid**  
Application can be downloaded at [www.lehigh.edu/financialaid](http://www.lehigh.edu/financialaid)
- Submit parent(s)' 2013 federal income tax return**  
Provide a copy of parent(s)' 2013 federal income tax return along with all accompanying schedules and W-2 forms.  
Families who file an extension with the IRS should submit a copy of their extension request, along with draft taxes and W-2 forms, to be followed by the completed tax return when available. If parent is not required to file a 2013 federal income tax return, please indicate this in Section E of the Lehigh University Application for Financial Aid
- Submit student's 2013 federal income tax return**  
Provide a copy of 2013 federal income tax return along with all accompanying schedules and W-2 forms.  
If student is not required to file a tax return, please indicate this in Section D of the Lehigh University Application for Financial Aid.
- Complete and submit the 2014-2015 business/farm supplement (if applicable)**  
Complete and submit this form along with copies of the business tax returns (Schedule C, corporate tax returns, partnership tax returns and K1) if either parent is self-employed or an owner (part or full) of a corporation/partnership.
- Complete and submit the 2014-2015 non-custodial parent's statement and income information (if applicable)**  
Complete and submit if biological parents are not married and custodial parent is not remarried.  
Please complete online [www.lehigh.edu/~infao/current/apply/forms.html](http://www.lehigh.edu/~infao/current/apply/forms.html). Provide copy of non-custodial parent's 2013 federal income tax return with all accompanying W-2 forms and schedules. If non-custodial parent is self-employed or owner (part or full) of a corporation/partnership, complete and submit 2014-2015 business/farm supplement form and submit 2013 corporate/partnership tax return.
- IRS Data Retrieval for FAFSA on the Web**  
If your application is selected for federal verification, you will be required to use the IRS Data Retrieval Tool\* to import your federal income tax information from the IRS on the FAFSA. If you are unable to use the IRS Data Retrieval Tool\* you may provide our office with a copy of an official 2013 Tax Return Transcript (this is not a request for a copy of an IRS 1040, 1040A, or 1040EZ that you filed with the IRS) for both yourself and your parent(s). You will be notified by our office if you have been selected for verification by the government and have not completed one of the steps. Failure to comply will result in the prevention of disbursement of all federal funds to your student account and could potentially put you at risk of being charged a late payment fee due to the resulting unpaid balance.  
\*The IRS Data Retrieval Tool cannot be used until one to two weeks after electronically filing a tax return and six to eight weeks after filing paper tax returns. You may need to use the Data Retrieval Tool after your original filing date by submitting a FAFSA correction.

Check the student portal often to view outstanding requests for paperwork and to confirm receipt of all application materials. Please give us five to seven business days from the date of submission for the information to be updated.

Please submit all documents via fax, e-mail or Dropbox at [www.lehigh.edu/financialaid](http://www.lehigh.edu/financialaid). Mailing documents is possible (but not preferred) and they may be sent to our centralized processing address at the Financial Aid/Admissions Office—27 Memorial Drive West, Bethlehem, PA 18015.

## Please contact us if you have any questions

Telephone: (610) 758-3181  
Fax: (610) 758-6211  
E-mail: [financialaid@lehigh.edu](mailto:financialaid@lehigh.edu)  
Website: [lehigh.edu/financialaid](http://lehigh.edu/financialaid)

Office of Financial Aid  
Barnett House  
218 West Packer Avenue  
Bethlehem, PA 18015

A Spanish-speaking representative is available in the Financial Aid Office to answer any questions.

# LEHIGH

UNIVERSITY

<sup>1</sup>The above materials are required if you are applying for institutional need-based aid. If you are applying for federal aid only, you will only need to submit the FAFSA. If you have been selected for verification by the government then you may be required to submit additional documents, such as the Lehigh University Application for Financial Aid, and/or use the IRS Data Retrieval Tool, as requested by our office.