

2018-2019 Upperclass Financial Aid Checklist¹

All application materials are due
to our office by March 15, 2018.

☐ **Complete the 2018-2019
CSS/Financial Aid PROFILE®**

Complete online at profileonline.collegeboard.com (School code: 2365)

☐ **Complete the 2018-2019
Free Application for
Federal Student Aid (FAFSA)**

Complete online at fafsa.ed.gov (School code: 003289) We strongly encourage use of the IRS data retrieval tool to complete the FAFSA.

☐ **Complete and submit the 2018-2019
Lehigh University Application for Financial
Aid Application can be downloaded at
lehigh.edu/financialaid**

☐ **Submit parent(s)' 2016
federal income tax return**

Provide a copy of parent(s)' 2016 federal income tax return along with all accompanying schedules and W-2 forms. If parent is not required to file a 2016 federal income tax return, please indicate this in Section D of the Lehigh University Application for Financial Aid.

☐ **Submit student's 2016
federal income tax return**

Provide a copy of 2016 federal income tax return along with all accompanying schedules and W-2 forms. If student is not required to file a 2016 federal income tax return, please indicate this in Section C of the Lehigh University Application for Financial Aid.

☐ **Complete and submit the parent(s)'
2016 federal business tax forms
(if applicable)**

Submit 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 2018-2019
non-custodial PROFILE and income
information (if applicable)**

Submit the non-custodial PROFILE if legal parents are not married and do not live together, and custodial parent is not remarried. Complete online at ncprofile.collegeboard.com. Submit copy of non-custodial parent's 2016 federal income

tax return along with all accompanying W-2 forms and schedules. If non-custodial parent is self-employed or owner (part or full) of a corporation/partnership, submit copies of the 2016 business tax forms (Schedule C, K-1, 1065, 1120S, and/or 1120).

☐ **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 2016 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.

Reminders

- All application materials must be completed and submitted by March 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.
- Applicants who submit applications after the deadline risk not being aided.

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.

TO SUBMIT MATERIALS: Lehigh is NOT an IDOC participating school. The Lehigh Application, parent and student tax information and any supplemental documentation should be submitted directly to Lehigh via the LU FileSender at lehigh.edu/financialaid/contact (preferred), fax mail or in-person.

2018-2019 financial aid notifications will be available via the Lehigh Portal by mid June.

Questions? Get in touch.

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E-mail: financialaid@lehigh.edu
Web: lehigh.edu/financialaid

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