



## Financial Aid Renewal Checklist 2018-2019

Emory University  
Office of Financial Aid  
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Atlanta, GA 30322

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2018-2019 FINANCIAL AID RENEWAL INFORMATION Access this form online, with active links to all the requested applications, from the Forms menu at the Emory Financial Aid homepage, [www.studentaid.emory.edu](http://www.studentaid.emory.edu)

	FORM	DEADLINE	NOTES
<input type="checkbox"/>	Renewal (FAFSA) Free Application for Federal Student Aid	May 1, 2018 Submit online	<ul style="list-style-type: none"> <li>The FAFSA Emory School Code is 001564</li> <li>The PROFILE Emory School Code is 5187</li> <li>Families are encouraged to submit online applications by March 15, to allow sufficient processing time, so that the application arrives at Emory by May 1.</li> </ul>
<input type="checkbox"/>	College Scholarship Service (CSS) PROFILE		
<input type="checkbox"/>	CSS Non-Custodial Parent PROFILE		
<input type="checkbox"/>	<b>Student's 2016 Income Tax Return</b>	May 1, 2018 Submit to IDOC	<ul style="list-style-type: none"> <li>Provide a signed copy of the 2016 tax return, and include all schedules and W-2 forms.</li> <li>Provide a signed copy of the 2016 tax return, and include all schedules and W-2 forms.</li> <li>Required for each business if parent owns or is part-owner</li> </ul>
<input type="checkbox"/>	<b>Custodial Parent(s)' 2016 Income Tax Return</b>		
<input type="checkbox"/>	Business Tax Return		
<input type="checkbox"/>	<b>Non-Custodial Parent(s)' 2016 Income Tax Return</b>	Due on Request Mail to Emory	<ul style="list-style-type: none"> <li>Provide a signed copy of the 2016 tax return, and include all schedules and W-2 forms.</li> <li>If your FAFSA is selected for verification, additional information will be requested on the OPUS To-Do List.</li> <li>Forms requested on the OPUS To-Do List are available online at <a href="#">Download Forms</a>.</li> </ul>
<input type="checkbox"/>	Federal Verification Documents		
<input type="checkbox"/>	Supplemental Documents		

Online award notification begins approximately July 2, 2018. Complete, on-time file review is ongoing, and award notification is July through August. [Late applications](#) will delay processing, reduce grant eligibility (funding may be limited to federal grants or loans), and late award notification begins in August.

### Other Notes

- If you do not intend to apply for financial aid, please send an email to [finaid@emory.edu](mailto:finaid@emory.edu) to request your financial aid application be cancelled.
- Merit Scholarships, the Courtesy Scholarship, and the Emory Opportunity Award will be renewed automatically, and require no financial aid application. Please email [your financial aid advisor](#) if you do not see your scholarship as anticipated aid on your July bill.
- PLUS Loans require a [FAFSA](#) and [Parent PLUS Loan Application](#) each year, so please send an email to [finaid@emory.edu](mailto:finaid@emory.edu) to inform us if you are only applying for a PLUS loan (and the request for other documents will be removed from the OPUS To-Do List).
- Financial aid applications load automatically if the full name, date of birth, and social security number match the student OPUS record.
- Update any biographical data on OPUS or by submitting documentation to the Office of Financial Aid for timely processing of your financial aid application.

## Document Submission Instructions

Documents requested by the Office of Financial Aid may be submitted via US mail, email or fax. **In an effort to safeguard your personal information, the Office prefers that forms be submitted via fax.** When submitting documentation, please do not submit image files or photographs.

### Step 1 Complete the Renewal FAFSA

- Complete the 2018-2019 [online FAFSA application](#)
  - **DEADLINE:** May 1, 2018
  - You should submit your application early, by March 15, 2018, to allow time for processing
  - [Retrieve your FSA ID](#) online, if you do not remember click on “Edit My FSA ID”
  - If possible, you are encouraged to use [IRS Data Retrieval](#)

### Step 2 Complete the CSS PROFILE

- Complete the 2018-2019 [online CSS PROFILE application](#)
  - **DEADLINE:** May 1, 2018
  - You should submit your application early, by March 15, 2018, to allow time for processing
  - Emory PROFILE code 5187
  - Once you submit your PROFILE, you cannot revise any information online, and any corrections must be sent to directly to Emory

### Step 3 Complete the 2018-2019 Noncustodial Parent CSS PROFILE

- Complete the 2017-2018 [online Noncustodial CSS PROFILE application](#)
  - After completing the PROFILE, College Board will send the student an email with instructions for the Noncustodial Parent CSS PROFILE, including CSS ID and password.
  - **DEADLINE:** May 1, 2018
  - You should submit your application early, by March 15, 2018, to allow time for processing
  - If a non-custodial waiver was approved, then this application will not be required (unless otherwise indicated).

### Step 4 Submit complete tax information to IDOC

- Complete the IDOC cover sheet
  - In February, families who have completed the CSS Profile will receive an email with instructions on submitting IDOC ([College Board's Institutional Documentation Service](#)).
  - Your IDOC Cover Sheet must accompany all documents that you submit to IDOC
  - Submit only one packet, including the information listed below.

- Attach signed copies of 2016 Tax Returns
  - Both Student and Parent (custodial parent(s) and spouse, if remarried).
  - **DEADLINE:** May 1, 2018
  - Acceptable Documents: Signed copy of IRS 1040, 1040A, or 1040EZ. Include all Schedules and **W-2's**.
  - Foreign taxes are required of non US residents. Provide a copy of the foreign taxes, translated into English, converted into USD, and include the currency conversion rate used.
  - If you, or your parent(s) will not file a 2016 income tax return, be sure to complete and submit the appropriate Non-Filer Statement available for download through IDOC.

Attach business tax returns (if applicable)

- Submit complete business tax returns for each business owned by parent(s)
- **DEADLINE:** May 1, 2018
- If your parent(s) own all or part of a Corporation, S Corporation, or Partnership, then submit a complete and signed copy of the 2016 IRS Form 1120, 1120S, or 1065, K-1's, **all related schedules, and the itemized list for "Other Deductions."**
- If parent(s) are less than a 1% shareholder, then only provide the K-1

Step 5 Submit supplemental document requests to Emory

Supplemental document requests should be mailed directly to Emory Office of Financial Aid

- Generally our office can confirm receipt of documentation within 5-7 business days of the date the document was mailed to our office.
- A file is considered on-time based on the submission of the FAFSA, PROFILE, and IDOC, and subsequent requests will not result in the file being changed to a late status.
- A file cannot be reviewed until all requested documents are complete
- Emory institutional forms are available online at [Download Forms](#)
- Questions about supplemental information requests may be directed to [your financial aid advisor](#)

Noncustodial parents signed 2016 Tax Returns

- If requested, your noncustodial parent should submit all pages and schedules of the 2016 tax return.
- Acceptable Documents: Signed copy of IRS 1040, 1040A, or 1040EZ. Include all Schedules and W-2's.
- If applicable, the noncustodial parent must provide foreign taxes or a non-filer statement (as described above)

Federal Verification

- If your FAFSA is selected for verification by the Department of Education, Emory will notify you by requesting additional information
- The student and parent (custodial) must provide IRS tax information by either using [IRS Data Retrieval](#) on the FAFSA, or requesting a [Tax Return Transcript](#) from the IRS. Taxes submitted to IDOC will not be sufficient to complete federal verification.

Additional Information

- Feel free to include a letter of explanation in the packet you send to IDOC, or with any documents provided to Emory, if your family has special circumstances or unusual expenses, or if you feel there are other details which will help us to understand more completely your financial situation.