

Carnegie Mellon Financial Aid Application

Undergraduate Student Application Deadline: April 15, 2006

Graduate Student Suggested Application Deadline: June 3, 2006

Carnegie Mellon Federal School Code: 003242

Mail the completed form(s) to:

Enrollment Services - The HUB
Carnegie Mellon University
5000 Forbes Avenue
Pittsburgh, PA 15213-3890

Or fax the completed form to:

412-268-8084

Questions? Contact The HUB:

412-268-8186

thehub@andrew.cmu.edu

Application Deadline Checklist

Carnegie Mellon, Enrollment Services, must receive the following information **by the above listed deadlines:**

All Carnegie Mellon Students

- 2006-2007 **signed** Carnegie Mellon Financial Aid Application (Applicable Sections).
- Processed Free Application for Federal Student Aid (FAFSA) - see Free Application for Federal Student Aid Information, page 2.
- 2005 Student's (and spouse's, if applicable) **signed** Federal Tax Return or **Employer/Income Information** - see Instruction 4.
- Prior to Federal Stafford and/or Perkins Loan funds being credited, **first-time borrowers at Carnegie Mellon** are required to complete Federal Entrance Loan Counseling - see Instruction 10.
- Carnegie Mellon Federal Stafford Loan Borrowers:**
To apply for your Federal Stafford Loan, see Instruction 8.

Dependent, Undergraduate Students Only

- 2005 Parent(s)' **signed** Federal Tax Return or **Employer/Income Information** - see Instruction 3.
- 2005 Parent(s)' W-2 Wage and Tax Statement(s) - legible copies.
- 2006-2007 Noncustodial Parent Information Form - if applicable (included in this application).
- Parents who wish to borrow a Federal PLUS Loan:**
To apply for your Federal PLUS Loan, all parental borrowers must complete a PLUS Master Promissory Note (MPN) or complete the pre-approval process at www.aessuccess.org - see Instruction 9.

Applicants who fail to meet all of these conditions will be assessed a \$500 late penalty fee if Carnegie Mellon need based grant funds are awarded. This \$500 late penalty fee, when assessed, will be deducted from your eligibility for Carnegie Mellon need based grant funds.

Attention Undergraduate Pennsylvania Residents: *If you do not apply by May 1, 2006 for Pennsylvania state grant assistance, we will reduce your eligibility for the Carnegie Mellon Undergraduate Grant by \$1000 if you would have been eligible for a PHEAA state grant. This is the amount of institutional grant assistance Carnegie Mellon would have received from the Pennsylvania Higher Education Assistance Agency (PHEAA) if you had applied on time.*

If you are eligible for grant assistance from your state but you do not apply, Carnegie Mellon will **not** provide additional grant assistance to replace your lost state grant.

Free Application For Federal Student Aid (FAFSA) - Important Information

You are required to complete and submit a **Free Application for Federal Student Aid (FAFSA)** or **Renewal FAFSA** if you wish to apply for federal or Carnegie Mellon institutional financial aid. Federal financial aid includes the Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Federal Perkins Loan, Federal Stafford Loan, and Federal Work-Study.

Important Websites

FAFSA Website
<http://fafsa.ed.gov>

PIN Website
<http://pin.ed.gov>

- All students must complete Steps Two and Three, questions 32-54.
- All parents must complete Step Four, questions 55-83.
- *Your financial aid eligibility cannot be determined if you do not file a FAFSA.*
- *To ensure that we receive your FAFSA information, you must list Carnegie Mellon in Step Six, Page 6, including our Federal School Code (003242), and complete the signatures in Step Seven.*

The FAFSA takes between 4-6 weeks to be processed by the U.S. Department of Education.

Enrollment Services is not mailing you a paper FAFSA for the 2006-2007 Academic Year. We recommend that you file your FAFSA or Renewal FAFSA electronically. The benefits of electronic filing include:

- Fast filing. Electronic filing reduces processing time by 7-14 days. The normal processing time is 4-6 weeks.
- Less need for corrections after processing. Your information is edited prior to submission. You will be prompted immediately to correct conflicting data.

Prior to completing the FAFSA or Renewal FAFSA on the web, you need to request a Personal Identification Number (PIN) from the Department of Education. ***If you are a dependent, undergraduate student, your parent must also request a PIN in order to electronically sign your FAFSA or Renewal FAFSA.**** We encourage parents to apply for a PIN so they can electronically sign their child(ren)'s applications on the Web. Request a PIN by visiting <http://pin.ed.gov>. If you already have a PIN, you do not need to request a new one. If you have lost or forgotten your PIN, you need to request that it be sent to you again. If you think someone knows your PIN, select the Change PIN option to request a new PIN combination.

- Your PIN serves as an electronic identifier and allows you to electronically sign and immediately transmit the FAFSA.
- Your PIN can also be used to access and correct your financial aid information online and to sign other federal student aid documents electronically.
- Your PIN provides access to personal records, guard it as you would your ATM PIN.

**** If your parent(s) decide not to request a PIN, they have the option of printing, completing and mailing the signature page of the electronic FAFSA to the Federal Processor. Be aware that this may increase processing time; for this reason we recommend that all parents and students obtain a PIN. The FAFSA IS CONSIDERED TO BE INCOMPLETE WITHOUT THE SIGNATURE PAGE IF YOU OR YOUR PARENT(S) HAVE NOT USED YOUR PINS TO SIGN THE FORM.***

If you need additional information, visit the FAFSA website, <http://fafsa.ed.gov>, or call 1-800-4FED-AID (1-800-433-3243) seven days a week, from 8 a.m. through midnight Eastern time.

Do not submit both an electronic and a paper FAFSA application.

Application Instructions

1. **If you are not applying for need based financial aid, you are not required to submit these forms.** Examples of need based aid include: Federal, State or Carnegie Mellon Undergraduate Grants, Federal Loans, and Federal or State Work-Study.

2. **2006-2007 Carnegie Mellon Financial Aid Application**

Dependent, Undergraduate Students are required to complete all sections and sign this application. **Independent Students and Graduate Students** are not required to complete the parental (blue) sections. *If you are unsure of your status, complete **Section B: Determination of Independent Student Status** prior to completing the entire application.*

On this form, you will be asked to provide us with information relevant to your financial aid eligibility. **Do not leave any question blank.** If your answer is zero, please use "0." You must accurately complete the Household and Educational Information on Page 8. If you are an undergraduate student, return your completed form and all required tax documents to The HUB on or before April 15, 2006. Make sure you affix the appropriate postage.

3. **Parent(s)' 2005 U.S. Federal Income Tax Return or Foreign Tax Return and W-2 Wage and Tax Statement(s) - Dependent, Undergraduate Students Only**

Please send us a **signed** copy of your parent(s)' **actual** 2005 Federal Income Tax Return, **pages 1 and 2 only**. *We will not accept a tax preparer's **stamp** in place of any signature(s).* We will accept a tax preparer's **signature**. We also require legible copies of all parental W-2 Wage and Tax Statement(s). Print your name and Student ID Number in the upper right corner of each tax document. **Do not** submit a copy of their prior year or an estimated tax return. If you file electronically, you are required to submit to us a **signed** copy of your electronic tax return. **All documents listed above are due to us on or before April 15, 2006.**

If your parent(s) are required to file a Federal Income Tax Return in a country other than the United States, you must provide us with a copy of their foreign tax return and **provide tax information translated into U.S. dollars on a 2005 U.S. Federal Income Tax Return**. This document must be signed by your parent(s) and a tax accountant.

If your parent(s) are not required by the U.S. Internal Revenue Service (IRS) to file a 2005 Federal Income Tax Return or to file a tax return in any other country, you are required to provide a list of employers and the source(s) of any income for 2005 (Page 6, Item 14).

4. **Student's/Spouse's 2005 U.S. Federal Income Tax Return or Foreign Tax Return**

We also require a **signed** copy of your **actual** 2005 Federal Income Tax Return. *We will not accept a tax preparer's **stamp** in place of any signature(s).* We will accept a tax preparer's **signature**. **Do not** submit a copy of the prior year or an estimated tax return. If you file electronically, you are required to submit to us a **signed** copy of your electronic tax return. **All documents listed above are due to us on or before April 15, 2006.**

If you are required to file a Federal Income Tax Return in a country other than the United States, you must provide us with a copy of your foreign tax return and **provide tax information translated into U.S. dollars on a 2005 U.S. Federal Income Tax Return**. This document must be signed by you and a tax accountant.

If you are not required by the U.S. Internal Revenue Service (IRS) to file a 2005 Federal Income Tax Return or to file a tax return in any other country, you are required to provide a list of employers and the source(s) of any income for 2005 (Page 5, Item 8).

5. **Taxable Federal Work-Study Earnings**

If you have taxable earnings from Federal Work-Study or other need based work programs, be sure to complete FAFSA Worksheet C. Taxable earnings from need based work programs can be found by clicking on the Aid/Account button of Student Information On-Line and selecting "Taxable Earnings from Need Based Work Programs."

6. **Documentation Eligibility (U.S. Citizenship or Eligible Noncitizen)**

You must be a U.S. Citizen or permanent resident alien to receive federal student aid. If you are a U.S. Citizen, **but were not born in the United States**, please send us documentation of your citizenship (e.g., a copy of your passport or naturalization certificate).

If you are a U.S. permanent resident alien or refugee, please send us verification. **If you submitted this information for a previous year, you do not need to submit this information unless it is requested by Enrollment Services.** Acceptable forms of verification include a photocopy of **both** sides of your I-551 or I-551C card. Other acceptable forms are listed on the top of Page 2 of the FAFSA.

7. **Noncustodial Parent Information - Dependent, Undergraduate Students Only**

Since we believe that parents have the responsibility to provide educational support for their children regardless of marital status or living arrangements, we require information from your noncustodial parent in cases where parents are divorced, separated or remarried. The information we require is listed specifically on the Noncustodial Parent Information Form included in this application.

8. Federal Stafford Loans

If you have previously borrowed a Federal Stafford Loan (FSL) and completed a Federal Stafford Master Promissory Note (MPN), you do not need to complete another Federal Stafford MPN for each subsequent academic year. Your FAFSA will serve as your application. If you are a first-time borrower at Carnegie Mellon, you must complete a Federal Stafford MPN online by visiting the American Education Services (AES) website: www.aessuccess.org. Complete instructions are available on The HUB website.

9. Federal PLUS Loans - Parents of dependent, undergraduate students only

All parents wishing to borrow a Federal PLUS Loan for the first time are required to complete a Federal PLUS Master Promissory Note (MPN). If the parent who will be a first-time borrower of a Federal PLUS Loan has a U.S. Department of Education PIN, he or she may complete the Federal PLUS MPN online by visiting the AES Website (www.aessuccess.org).

Parents who previously borrowed through the Federal PLUS Loan Program and wish to reapply must complete the Federal PLUS pre-approval process (www.aessuccess.org).

Complete instructions will be available on The HUB Website after February 15, 2006.

10. Federal Entrance Loan Counseling

All **first-time** federal student loan borrowers must complete entrance counseling prior to their federal loan funds being credited to their student accounts. During the entrance counseling session, you will be informed of your rights and responsibilities as a borrower as well as debt management strategies and advice on repayment options. If you have never completed entrance counseling, we will notify you via e-mail to complete the counseling session online prior to the approval of your loan.

Useful Financial Information

FAFSA - www.fafsa.ed.gov

Tuition Management Services - www.afford.com

The College Board - www.collegeboard.com

FastWeb - www.fastweb.com

American Education Services - www.aessuccess.org

PHEAA - (Pennsylvania State Grant) - www.pheaa.org

Student Gateway to the U.S. Government - www.students.gov

The SmartStudent Guide to Financial Aid - www.finaid.org

National Student Loan Data System - www.nslsds.ed.gov

Loan Locator - www.studentclearinghouse.org/secure_area/loan_locator.asp

You Can Deal With It - www.youcandealwithit.com

Independent 529 Plan - www.independent529plan.org

Carnegie Mellon University does not discriminate and Carnegie Mellon University is required not to discriminate in admission, employment, or administration of its programs or activities on the basis of race, color, national origin, sex or handicap in violation of Title VI of the Civil Rights Act of 1964, Title IX of the Educational Amendments of 1972 and Section 504 of the Rehabilitation Act of 1973 or other federal, state, or local laws or executive orders.

In addition, Carnegie Mellon University does not discriminate in admission, employment or administration of its programs on the basis of religion, creed, ancestry, belief, age, veteran status, sexual orientation or gender identity. Carnegie Mellon does not discriminate in violation of federal, state, or local laws or executive orders. However, in the judgment of the Carnegie Mellon Human Relations Commission, the Presidential Executive Order directing the Department of Defense to follow a policy of, "Don't ask, don't tell, don't pursue," excludes openly gay, lesbian and bisexual students from receiving ROTC scholarships or serving in the military. Nevertheless, all ROTC classes at Carnegie Mellon University are available to all students.

Inquiries concerning application of these statements should be directed to the Provost, Carnegie Mellon University, 5000 Forbes Avenue, Pittsburgh, PA 15213, telephone 412-268-6684 or the Vice President for Enrollment, Carnegie Mellon University, 5000 Forbes Avenue, Pittsburgh, PA 15213, telephone 412-268-2056.

Carnegie Mellon University publishes an annual campus security report describing the university's security, alcohol and drug, and sexual assault policies and containing statistics about the number and type of crimes committed on the campus during the preceding three years. You can obtain a copy by contacting the Carnegie Mellon Police Department at 412-268-2323. The security report is available through the World Wide Web at www.cmu.edu/police/statistics.htm.

Carnegie Mellon University makes every effort to provide accessible facilities and programs for individuals with disabilities. For accommodations/services please contact the Equal Opportunity Services Office at 412-268-2012.

Obtain general information about Carnegie Mellon University by calling 412-268-2000.

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