PSAS
Providing Need Analysis Since 1975

909 Canterbury Rd., Suite P / Westlake, OH 44145
(440)892-4272
www.psas.org

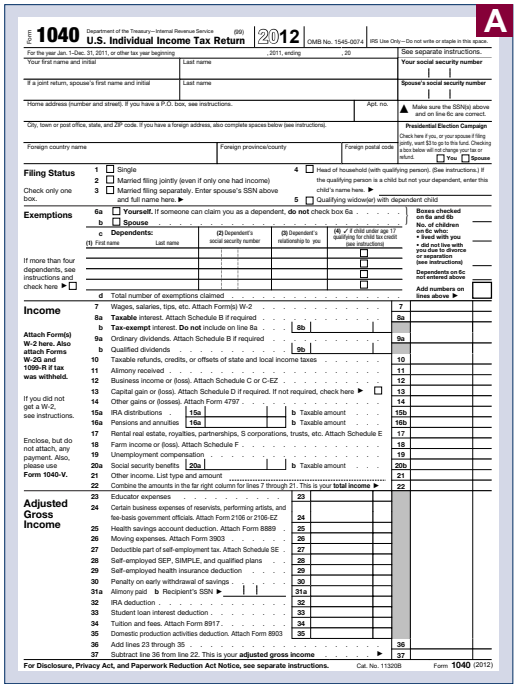
USING THE PSAS ONLINE APPLICATION

Step One: Gather your Required Documentation and Information.

Required Documentation includes the following:

- You and your co-applicant's (if applicable) social security number(s).
- Detailed copies of all pages and Schedules of your 2012 Federal Income Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS) for individuals listed in Sections A and B. Recaps and/or Summary Forms are not acceptable. See **A**
- Copies of all 2012 W-2 Wage and Tax Statement Forms, all 2012 1099/1099R for Interest/Dividends, Pensions/ Annuities, and/or Misc. Income Forms for individuals listed in Sections A and B. See **B** & **C**
- **If you have not yet filed your 2012** Federal Income Tax Return, provide a complete copy of your 2011 Federal Income Tax Return Form 1040, 1040A, or 1040EZ (as filed with the IRS), along with all 2012 W-2 Forms and 1099 Forms. If you are applying after April 15, 2013, please provide a copy of the 2012 IRS Extension for Filing.
- If you own a business, you will also be required to provide 2012 Business Income Estimates for each business.
- Documentation of TOTAL AMOUNTS received in 2012 for all Non-Taxable Income (welfare, food stamps, Social Security, housing assistance, unemployment, Workers' Compensation, etc.).
- The value and amount still owed on your home.
- The value and amount still owed on any investments, including real estate.

A


Form 1040 Department of the Treasury—Internal Revenue Service (99) U.S. Individual Income Tax Return 2012 OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2011, or other tax year beginning , 2011, ending , 20

Your first name and initial | Last name | See separate instructions. | Your social security number

If a joint return, spouse's first name and initial | Last name | Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. | Apt. no. | Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). | Presidential Election Campaign

Foreign country name | Foreign province/county | Foreign postal code

Filing Status
Check only one box.
1 ☐ Single
2 ☐ Married filing jointly (even if only one had income)
3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶
4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child

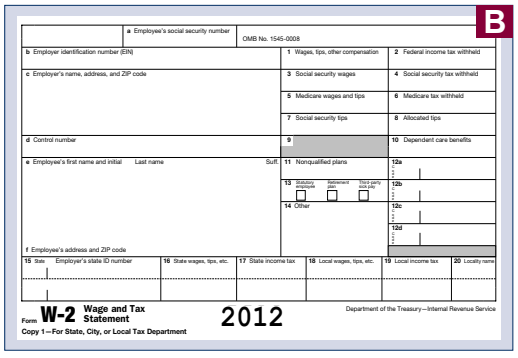
Exemptions
6a ☐ Yourself. If someone can claim you as a dependent, do not check box 6a
b ☐ Spouse
c Dependents: (1) First name Last name | (2) Dependent's social security number | (3) Dependent's relationship to you | (4) ✓ if child under age 17 qualifying for child tax credit (see instructions)
If more than four dependents, see instructions and check here ▶ ☐
d Total number of exemptions claimed
Boxes checked on 6a and 6b
No. of children on 6c who:
• lived with you
• did not live with you due to divorce or separation (see instructions)
Dependents on 6c not entered above
Add numbers on lines above ▶

Income
Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld.
If you did not get a W-2, see instructions.
Enclose, but do not attach, any payment. Also, please use Form 1040-V.
7 Wages, salaries, tips, etc. Attach Form(s) W-2
8a Taxable interest. Attach Schedule B if required
b Tax-exempt interest. Do not include on line 8a | 8b
9a Ordinary dividends. Attach Schedule B if required
b Qualified dividends | 9b
10 Taxable refunds, credits, or offsets of state and local income taxes
11 Alimony received
12 Business income or (loss). Attach Schedule C or C-EZ
13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐
14 Other gains or (losses). Attach Form 4797
15a IRA distributions | 15a | b Taxable amount
16a Pensions and annuities | 16a | b Taxable amount
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E
18 Farm income or (loss). Attach Schedule F
19 Unemployment compensation
20a Social security benefits | 20a | b Taxable amount
21 Other income. List type and amount
22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶

Adjusted Gross Income
23 Educator expenses
24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ
25 Health savings account deduction. Attach Form 8889
26 Moving expenses. Attach Form 3903
27 Deductible part of self-employment tax. Attach Schedule SE
28 Self-employed SEP, SIMPLE, and qualified plans
29 Self-employed health insurance deduction
30 Penalty on early withdrawal of savings
31a Alimony paid b Recipient's SSN ▶
32 IRA deduction
33 Student loan interest deduction
34 Tuition and fees. Attach Form 8917
35 Domestic production activities deduction. Attach Form 8903
36 Add lines 23 through 35
37 Subtract line 36 from line 22. This is your adjusted gross income ▶

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form 1040 (2012)

B


a Employee's social security number | OMB No. 1545-0008

b Employer identification number (EIN) | 1 Wages, tips, other compensation | 2 Federal income tax withheld

c Employer's name, address, and ZIP code | 3 Social security wages | 4 Social security tax withheld | 5 Medicare wages and tips | 6 Medicare tax withheld | 7 Social security tips | 8 Allocated tips

d Control number | 9 | 10 Dependent care benefits

e Employee's first name and initial Last name Suff. | 11 Nonqualified plans | 12a | 13 Statutory employee, Retirement plan, Third-party sick pay | 12b | 14 Other | 12c | 12d

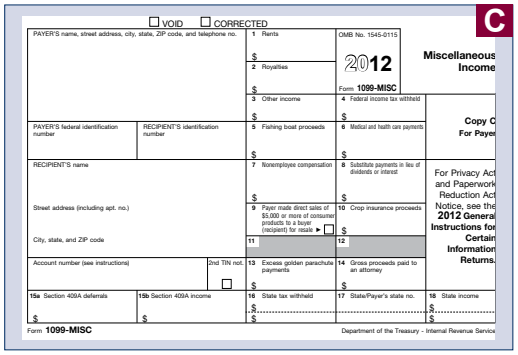
f Employee's address and ZIP code

15 State Employer's state ID number | 16 State wages, tips, etc. | 17 State income tax | 18 Local wages, tips, etc. | 19 Local income tax | 20 Locality name

Form W-2 Wage and Tax Statement 2012 Department of the Treasury—Internal Revenue Service

Copy 1—For State, City, or Local Tax Department

C


☐ VOID ☐ CORRECTED

PAYER'S name, street address, city, state, ZIP code, and telephone no. | 1 Rents | OMB No. 1545-0115 | 2012 | Miscellaneous Income

2 Royalties | Form 1099-MISC

3 Other income | 4 Federal income tax withheld

PAYER'S federal identification number | RECIPIENT'S identification number | 5 Fishing boat proceeds | 6 Medical and health care payments | Copy C For Payer

RECIPIENT'S name | 7 Nonemployee compensation | 8 Substitute payments in lieu of dividends or interest | For Privacy Act and Paperwork Reduction Act Notice, see the 2012 General Instructions for Certain Information Returns.

Street address (including apt. no.) | 9 Payer made direct sales of $5,000 or more of consumer products to a buyer (recipient) for resale ▶ ☐ | 10 Crop insurance proceeds | 11 | 12

City, state, and ZIP code

Account number (see instructions) | 2nd TIN not. ☐ | 13 Excess golden parachute payments | 14 Gross proceeds paid to an attorney

15a Section 409A deferrals | 15b Section 409A income | 16 State tax withheld | 17 State/Payer's state no. | 18 State income

Form 1099-MISC Department of the Treasury - Internal Revenue Service

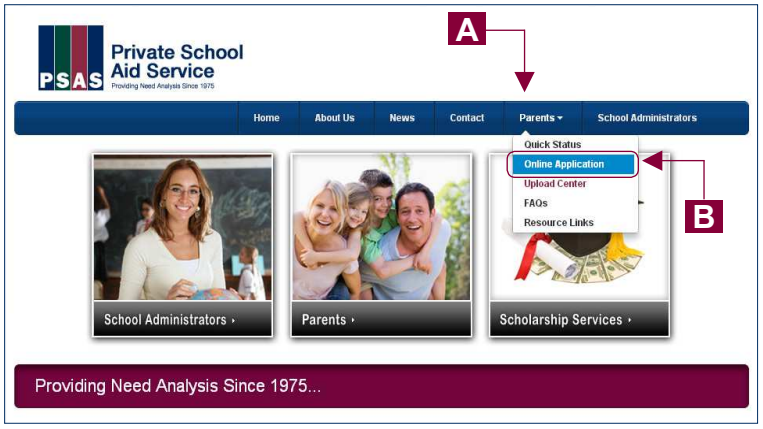
909 Canterbury Rd., Suite P / Westlake, OH 44145
(440)892-4272
www.psas.org

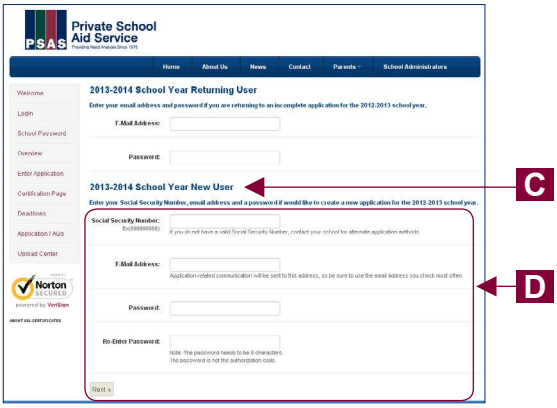
Providing Need Analysis Since 1975

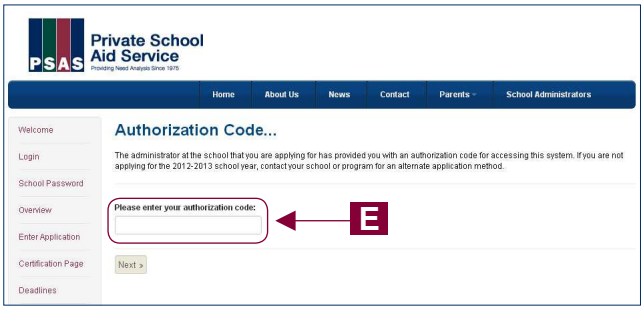
USING THE PSAS ONLINE APPLICATION

Step Two: Access the online application.

- Go to the website – **www.psas.org**
- Click on the **Parents** button. See **A**
- Click the **Online Application** button. See **B**
- Go to **New User** for the 2013-2014 academic year (you must create a new user ID each school year). See **C**
- Complete the **New User** section and click **next**. See **D**
- Enter the **Authorization Code** that your school or program has given you and click **next**. See **E**
- Read the **Overview** screen and click **next**.
- You can now begin the application.







NOTE:

You will not be able to access your application or make any changes after you make your payment.

Your information is saved as you enter it. If you have started an application and need to complete it at a later time, simply close your browser and your information will be saved. You will be able to sign back in at a later time as long as you have not paid your application fee.

If you would like a copy of the information you are submitting, you will need to print each page as you complete it. PSAS cannot provide you with a copy after you submit it.

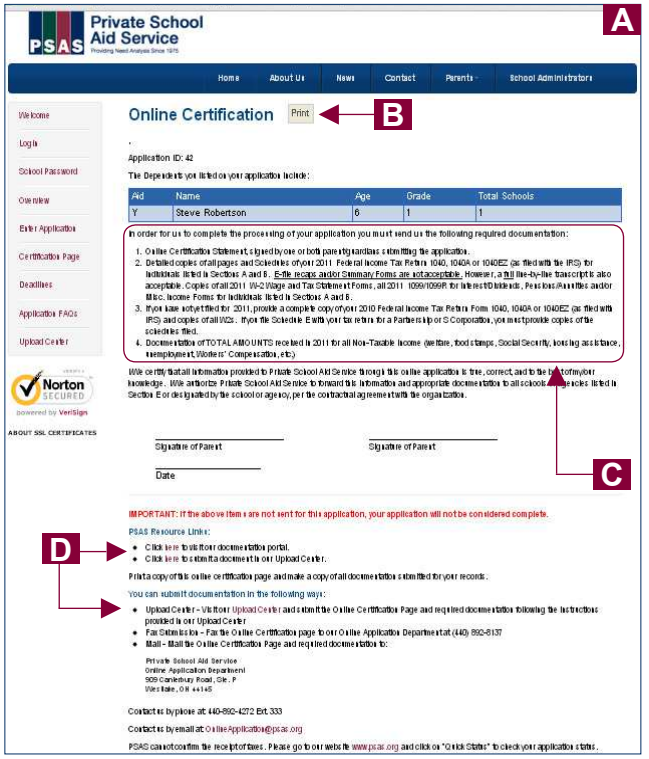
909 Canterbury Rd., Suite P / Westlake, OH 44145
(440)892-4272
www.psas.org

Providing Need Analysis Since 1975

USING THE PSAS ONLINE APPLICATION

Step Three: Submit the Application Fee. This must be completed online with a Debit or Credit Card.

- Payments via VISA, Master Card, Discover, or American Express are accepted
- All payment transactions are protected through the use of a secure server.
- Once payment has been submitted, the **Online Certification Page** will be displayed. See A
- Read the information on the page using the scroll bar to go to the bottom of the page.
- Use the **Print** button at the top to print the page . See B



Step Four: Submit your Required Documentation to PSAS (see the Online Certification page for a list of required documents, see C)

Please choose **one** of the following methods to submit **all** of your documentation:

- **Email:** online@psas.org
- **Upload:** Using the upload center at www.psas.org (See D)
- **Fax:** 440-892-8137
- **Mail:** PSAS
  Online Application Dept.
  909 Canterbury Rd. Suite P
  Westlake, OH 44145

NOTE: Your application will not be considered complete until all required documentation is received by PSAS.

If you need to reprint the Certification Form, just log in as a **Returning User**, scroll to the bottom of the screen and click on the Certification Page button. If you need any help completing the form, you can contact our **Support Desk** at 440-892-4272, or e-mail us at online@psas.org