



State Grant and Special Programs
Phone: 1-800-692-7392 Fax: 717-720-3786
P.O. Box 8157, Harrisburg, PA 17105-8157

2017-18 FAMILY SIZE AND NUMBER ENROLLED CLARIFICATION FORM
(INDEPENDENT STUDENT)

(NOTE: Deadline for returning this form and 2015 tax documents to PHEAA is April 1, 2018.)

Print Student's Name

Student's Account Number grid

Student's Account Number

OR

Student's Social Security Number grid

Student's Social Security Number

2017-18

The Pennsylvania Higher Education Assistance Agency (PHEAA) requires additional information concerning the number of people in your household and/or the number of people enrolled in college. Therefore, you (and your spouse, if married) are requested to complete and sign this form. Additionally, PHEAA REQUIRES A COMPLETE COPY OF THE 2015 U.S. INCOME TAX RETURN THAT YOU (AND YOUR SPOUSE, IF MARRIED) FILED WITH THE IRS IF SUCH HAS NOT BEEN PREVIOUSLY SUBMITTED. THIS INCLUDES ALL OF THE SUPPORTING FORMS AND SCHEDULES, AND ALL 2015 WAGE AND TAX STATEMENTS (W-2 FORMS). EACH W-2 FORM SHOULD CONTAIN FIGURES IN BOX 1 AND EITHER BOX 16 OR BOX 18. IF YOU (AND YOUR SPOUSE, IF MARRIED) HAVE AN INTEREST IN A CORPORATION AND/OR PARTNERSHIP, YOU ALSO NEED TO SUBMIT COPIES OF THE APPROPRIATE U.S. PARTNERSHIP AND/OR CORPORATION TAX RETURN(S), INCLUDING THE COMPLETED BALANCE SHEET(S) AND K-1 SCHEDULES. If your family owns and controls more than 50% of a business and has 100 or less full-time or full-time equivalent employees, please indicate such with the correspondence you are sending. YOU MAY HAVE ALREADY SUBMITTED TAX DOCUMENTS TO YOUR SCHOOL, BUT PHEAA REQUIRES A COPY AS WELL. THIS INFORMATION AND THE COMPLETED FORM SHOULD BE SENT TO PHEAA, P.O. BOX 8157, HARRISBURG, PA 17105-8157 WITHIN 30 DAYS. If you have questions concerning this matter, please contact Agency staff toll-free at 1-800-692-7392 (TTY: Dial 711 for hearing impaired).

- 1. List each person, and their relationship to you, that you will support between July 1, 2017 and June 30, 2018. Include yourself and your spouse. Include your children if they receive more than half of their total support from you or if they would be required to provide your information when applying for Title IV Federal Student Aid. Include others if they now live with you and receive more than half of their total support from you and will continue to receive more than half of their total support from July 1, 2017 through June 30, 2018. Do NOT include any children for whom child support paid has been reported.

Please note that in order for you or your spouse, if married, to claim that you are providing more than half of someone's support, you must be able to demonstrate that the direct support you provide is greater than the personal resources of the individual listed in the household size. Relevant definitions include:

Direct support represents both in-kind support such as free/reduced rent, utilities, medical and dental care, payment of college costs or services in addition to actual cash assistance. Individual personal resources include both taxable and untaxable income such as wages, unemployment compensation, retirement income/distributions, dividend and investment earnings, Social Security benefits, disability payments, and other sources of income.

Horizontal lines for student information



