This form is supplemental to the FAFSA and is required when you have an incomplete PA State Grant record. To avoid unnecessary delays in consideration for PA State Grant awards, it is important that you read the instructions before providing answers on this form. When your response to a question is zero, write “zero” in the answer space. Some question numbers and letters on this form are purposely not sequential for application entry system reasons.

**IMPORTANT! Check the box that matches your living situation and answer the questions on this form based on your selection.**

- [ ] Both Parents
- [ ] Mother Only
- [ ] Father Only
- [ ] Mother and Stepparent
- [ ] Father and Stepparent
- [ ] In the Care of a Person (Guardian)/Appointed Entity
- [ ] Unmarried and in My Own Care

Additional information is required if checking one of the choices below. Please visit pheaa.org/livingsituation for guidance.

1. Student's date of birth (Month/Day/Year)

2. State of legal residence

3. Date student established legal residency (Month/Year)

4. Current parental marital status
   - married/remarried
   - never married
   - divorced/separated
   - widowed
   - unmarried and both parents living together

5. Will the student receive (or have) a bachelor's degree before July 1, 2021?

   - YES
   - NO

6. Date the student received, or will receive, a high school diploma, either by graduating from high school OR earning a GED (Month/Year)

   (Leave blank if the question does not apply to you - see instructions.)

7. Name and address of student's high school. **If you received a GED**, write GED in place of the high school name.

8. a. Is the student a veteran of the U.S. Armed Forces?

   - YES
   - NO

   b. Enter month/year student was separated or released from active duty in the U.S. Armed Forces.

9. Number of parent supported family members, including parents, in 2021-22 academic year (see instructions)

10. Number of college students in 2021-22 academic year, **excluding** parents /stepparent (see instructions)

11. Parent(s)/Stepparent's U.S. 2019 income tax filing status

   - Have Filed
   - Will File
   - Will Not File

12. Parent(s)/Stepparent's 2019 type of tax return filed

   - IRS 1040
   - Foreign Tax Return
   - Other


   - Student:
   - Parent(s)/Stepparent:

14. 2019 Income earned from work, see instructions

   - Student:
   - Father/Stepparent/Parent 1:
   - Mother/Stepparent/Parent 2:

15. 2019 Untaxed Income

   a. Payments to tax-deferred pensions, 401(k), 403(b), etc. including involuntary contributions

   - Student:
   - Parent(s)/Stepparent:

   b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other plans

   - Student:
   - Parent(s)/Stepparent:

   c. Child support received for all children

   - Student:
   - Parent(s)/Stepparent:

   d. Tax exempt interest income from IRS Forms

   - Student:
   - Parent(s)/Stepparent:

   e. Untaxed portions of IRA distributions and pensions from IRS Forms

   - Student:
   - Parent(s)/Stepparent:

   f. Housing, food and other allowances paid to members of military, clergy and others

   - Student:
   - Parent(s)/Stepparent:

**Continued on page 2**
h. Veterans noneducation benefits as referenced in the instructions

i. Other untaxed income not reported (see instructions)

j. Money received, or paid on your behalf, not reported elsewhere on this form

19. 2019 Additional Financial Information
   a. Education Credits (American Opportunity and Lifetime Learning tax credits)
   b. Child support paid because of divorce or separation or as a result of legal requirement
   c. Taxable earnings from need-based employment programs
   d. Taxable college grant and scholarship aid reported to the IRS as income
   e. Taxable combat pay or special combat pay
   f. Taxable earnings from work under a cooperative education program offered by a college

20. 2019 Income tax paid, see instructions

21. Investment net worth (which should include the PA 529 College Program)

21a. The PA 529 College Program value which was reported in question 21

22. Business and/or investment farm net worth

23. Balance of cash, savings and checking accounts

24. Please check the box that matches your living situation at the top of page 1 of this form.

25. Father/stepparent/parent 1 is currently: ____ (4-employed/self-employed; 5-deceased; 6-disabled (complete & total); 7-retired; 8-not employed/homemaker; 9-whereabouts unknown)

26. Mother/stepparent/parent 2 is currently: ____ (4-employed/self-employed; 5-deceased; 6-disabled (complete & total); 7-retired; 8-not employed/homemaker; 9-whereabouts unknown)

29. SSN of father/stepparent/parent 1 ____________

30. SSN of mother/stepparent/parent 2 ____________

32. College student will be attending

**If uncertain, list your first choice college**

College Name: ____________________________

City/State: _______________________________

33. Student's housing status

34. Student's enrollment status (see instructions - full-time, half-time, less than half-time, etc.)

35. Student's grade level during the 2021-22 academic year

36. Student's program of study

Program Name _____________________________

Code

_________________________ _____________________________

STATEMENT OF CERTIFICATION AND AUTHORIZATION

37. By signing the Pennsylvania State Grant Status Notice, I/we hereby affirm that the signature(s) below constitute acceptance of the Rights and Responsibilities Certification document found on pheaa.org and in the 2021-22 PA State Grant Form and/or Status Notice Instructions, which is incorporated herein by reference and which I/we have read, understand, agree to, and certify. I further understand that if I provide an email address, communications regarding the PA State Grant Program may be sent to me through electronic communications methods.

_________________________ _____________________________

Signature of Student Date

Signature of Parent Date

_________________________ _____________________________

Student's Email Address - Print Legibly

Parent(s)' Email Address - Print Legibly

You must return BOTH pages of this form to:

PHEAA, State Grant and Special Programs, P.O. Box 8157, Harrisburg, PA 17105-8157 or fax to 717-720-3786
Rights and Responsibilities Certification Document

Applicant’s Rights, Responsibilities, Privacy, and Certification for the Pennsylvania State Grant Program

To stay current with the status of your Pennsylvania State Grant, please keep your email address updated and regularly check your record through Account Access via PHEAA’s Secure Sign-In at www.pheaa.org.

All applicants have certain rights regarding their application for State Grant aid. When an applicant has been awarded a PA State Grant, the applicant also has certain responsibilities as a recipient. This document explains these rights and responsibilities and provides other important information. This document and other PA State Grant forms are available on PHEAA’s website at www.pheaa.org. The rights and responsibilities of all applicants are provided for by 24 P.S. §5151, et. seq., and 22 Pa. Code §121.41, et. seq. To fully understand your rights and responsibilities, your full review of these provisions is encouraged. Nothing stated in this document supersedes applicable law, and to the extent, anything stated in this document conflicts with applicable law, applicable law controls.

PHEAA reserves the right to modify the Rights and Responsibilities Certification Document at any time. It is your responsibility to review and adhere to the Rights and Responsibilities Certification Document in effect at the time of each Application and/or receipt of each PA State Grant award. Submitting an Application and/or accepting a PA State Grant award constitutes your acknowledgement and acceptance of the then current Rights and Responsibilities Certification Document.

Section I explains how to submit applications and corrections, request reconsideration of PA State Grant status, and provides general information. Section II explains the primary PA State Grant eligibility requirements. These requirements are not all inclusive; however, all requirements are provided for in the PA statute and regulations or other authority. Section III provides information on PHEAA’s Privacy Policy, the Federal Privacy Act, and use of your Social Security number. Section IV explains the certification and authorization that your acceptance provides.

For purposes of this Rights and Responsibilities Certification Document, “Application” includes the Free Application for Federal Student Aid (FAFSA®) and the Pennsylvania State Grant Form and/or PA State Grant Status Notice; “Institution” includes all schools, campuses, or additional locations that are affiliated through ownership or administration with the home postsecondary institution; and “State Grant” means the Pennsylvania State Grant Program.

Section I: Eligibility Update, Reconsideration, and General Information

The Student Aid Report (SAR) you receive after filing the FAFSA will detail all of the responses you provided on your FAFSA. If you determine that any of the enrollment, school choice, or program of study data is incorrect on your SAR, you may correct that information through Account Access at www.pheaa.org. If financial data or other information is incorrect, you must submit corrections as specified on PHEAA’s webpage at www.pheaa.org. In rare cases, you may receive a printed PA State Grant Status Notice on which to submit updates. When submitting changes on this form, appropriate signatures must be provided and the form must be returned to PHEAA.

When determining PA State Grant eligibility, income and assets have been disregarded when calculating awards for those applicants who are veterans. Income has also been disregarded for those applicants who provided information regarding a recent death or a recent permanent and total disability of a parent or spouse. For students who have provided information regarding a recent death or disability of a parent or spouse, disregarding income for award calculation and the related, special processing is limited to one award year, and income and asset information will be considered in future award years. This special processing is also subject to the maximum award allowed per cost of the institution the student is attending.

Assets held in a Pennsylvania 529 college savings plan account are disregarded when determining PA State Grant eligibility. If Pennsylvania 529 college savings plan assets have been included in the investments reported on the FAFSA, please indicate the value of those assets when completing the online Pennsylvania State Grant Form or PA State Grant Status Notice.

Failure to comply with the rights and responsibilities under which the PA State Grant is awarded may result in forfeiture of the PA State Grant award. Once a recipient is found to be out of compliance with the eligibility requirements, or if you question your eligibility for any reason, you are required to report your situation in writing to PHEAA, Pennsylvania State Grant Program, P.O. Box 8157, Harrisburg, PA 17105-8157 immediately, but no later than April 1 of the applicable academic year (or October 31 following the applicable summer term). Failure to do so may result in legal action against you. By submitting the Application and related documents, you authorize the institution to release any and all information relevant to your PA State Grant eligibility to PHEAA.

Public Notice - By accepting a PA State Grant award, the recipient authorizes PHEAA to make the required public announcement of such and/or provide your information, including your email address, to other Commonwealth agencies and officials. Any student who objects to such announcement must notify PHEAA in writing within 14 days of notice of his/her award.

Payment of PA State Grant - Payment of your PA State Grant award is made directly to your institution. Institutions are required to verify student eligibility and must report questionable student eligibility to PHEAA and withhold crediting to your account in those cases.

Aid Deferments - PHEAA may approve a request for deferment of a PA State Grant award for one academic term at a time provided that an award may not be deferred beyond July 1 of any given calendar year. As such, PA State Grant awards may not be deferred from one award year to the next; reapplication is necessary.

Apply for Your PA State Grant Each Year - You must apply/reapply for PA State Grant aid each year by the appropriate deadline. Your eligibility will depend on program funding and compliance with all eligibility requirements.

Application for Summer Aid - If you will be enrolled during the summer, it is your responsibility to file the separate PA State Grant application which is available online. An academic year grant is normally processed for the period that begins in September and ends in May and does not cover the summer term.

Approved Institutions - The institution you attend must be approved for participation in the PA State Grant Program. Check with the financial aid office at the institution you are planning to attend to confirm the institution is approved.

NOTE - With certain limited exceptions, applicants attending institutions in Maryland or New York are not eligible for a PA State Grant award.
Rights and Responsibilities Certification Document

Section II: Primary Eligibility Requirements for the PA State Grant Program

Academic Progress - A student is required to successfully complete a minimum of six (6) semester credits per semester (or the equivalent) for each part-time PA State Grant award received and a minimum of twelve (12) semester credits per semester (or the equivalent) for each full-time PA State Grant award received. Credits earned for repeat courses which were previously counted when PA State Grant progress was verified cannot be counted again. Academic progress is confirmed by the financial aid administrator at your institution at the end of each award year. Failure to meet the minimum requirements means that you are ineligible for further PA State Grant aid until you have successfully completed the required number of credits. For example, a student receiving a full-time PA State Grant during the fall semester and a part-time PA State Grant award during the spring semester must successfully complete a minimum of eighteen (18) semester credits before being eligible for any further PA State Grant aid. Full-time students enrolled in four-year degree programs progressing at the rate of only twenty-four (24) semester credits per year (or the equivalent), while meeting the minimum PA State Grant progress standard, will utilize all of their PA State Grant eligibility before completing the minimum 120 credits required of most bachelor degree programs. If you have any questions regarding your academic progress or credits that may be counted toward PA State Grant academic progress, you should contact your financial aid administrator.

Criminal Offense - If you have been convicted of a criminal offense for which you are currently incarcerated, you must notify PHEAA in writing. You are NOT eligible for a PA State Grant award. You should also be aware that, by law, schools are required to report recipients who are incarcerated.

Default - Students who have defaulted (or have a claim of default pending) on any educational loan guaranteed or reinsured by the federal government, state government, or any institution are not eligible for a PA State Grant and must notify PHEAA of such default in writing. This also applies to programs where PA State Grant awards have been converted to loans due to failure to meet all eligibility or service requirements and the loan is in a default status.

Domicile - Domicile is a person's true, fixed, and permanent home, the place to which the person intends to return whenever absent.

A student who is 18 years of age or older at the time of application must have been a bona fide domiciliary of Pennsylvania for a period of at least 12 consecutive months immediately preceding the date of application, exclusive of the time the student spent while enrolled in an educational institution if the student came into or remained in Pennsylvania for the purpose of attending a postsecondary school.

A student who is under 18 years of age at the time of application must have a supporting parent or guardian (defined as a person with whom a minor child has lived and in whose continuous direct care and control the child has been for at least the last two consecutive years) who has been a bona fide domiciliary of Pennsylvania for a period of at least 12 consecutive months immediately preceding the date of application and who continues to be a Pennsylvania domiciliary until fall term classes commence.

A student is ineligible if the student: (1) ceases (or the parent(s) or guardian ceases if the student is under 18) to be a domiciliary prior to the first day of classes of the academic year; (2) receives, due to residency, the benefit of in-state tuition or fees at a public postsecondary school located in another state; or (3) indicates that the state of legal residence is a state other than Pennsylvania. If you are registered to vote in a state other than Pennsylvania, you are considered to have abandoned your Pennsylvania domicile and shall be ineligible for a PA State Grant award unless and until you register to vote in Pennsylvania. If you again register to vote in Pennsylvania, you should contact PHEAA immediately.

PHEAA shall make the final decision on all matters pertaining to domicile with respect to PA State Grant eligibility.

Enrollment Status - Half-time enrollment is defined as at least six (6) semester credits but less than twelve 12 semester credits per semester (or the equivalent). Full-time enrollment is defined as the equivalent of at least twelve 12 semester credits per semester. For institutions operating on clock hours, full-time enrollment is normally the equivalent of 450 clock hours per term or non-term payment period.

Financial Data - In order to be eligible to receive a PA State Grant award, you/your family must demonstrate sufficient financial need as determined by PHEAA's approved award formula in place for the applicable award year. The applicant, the applicant's parents/stepparents, and/or spouse who provided financial data on the FAFSA shall also, if requested by PHEAA, (i) provide PHEAA with relevant financial data, including copies of state and federal income tax returns and/or other relevant documents; and/or (ii) authorize the Director of the Pennsylvania Personal Income Tax Bureau and the Federal Internal Revenue Service to release to PHEAA a copy or extract of state and federal income tax returns or transcripts filed by such person.

Secondary School Graduation - You must be (i) a graduate of an approved secondary school (including those in American Territories, American military bases overseas, and those located in foreign countries if they have American accreditation); (ii) the recipient of a Commonwealth secondary school diploma or the equivalency diploma of another state; or (iii) the recipient of any diploma or certificate accepted and/or approved by the Pennsylvania Department of Education as fulfillment of the secondary school graduation requirement. Diplomas issued through distance learning or correspondence courses do not fulfill the secondary school graduation requirement.

Maximum Number of PA State Grants - Students are limited to a maximum number of PA State Grant awards even though some students may require additional terms to complete their program. Students enrolled in an associate degree program are typically limited to two academic year PA State Grants awards (2.00 grants). By law, no student may receive more than four academic year PA State Grant awards (4.00 grants) except students enrolled in a bona fide five-year program or specially approved five-year cooperative work-study program. This is also true for students enrolling part-time, with each term award counting as one-half of a full-time term. A summer PA State Grant award is included in the maximum number of PA State Grant awards that you may receive.

Processing Applications - Upon receipt of an application and the required financial data, PHEAA will review the application form for completeness. Where the form is found to be incomplete, additional data will be requested and final processing of the application will be discontinued until all requested data is submitted. In its sole discretion, PHEAA may terminate the processing of an incomplete application when the additional data is not supplied to PHEAA after two requests.

Program of Study - Your total program of study must be at least two academic years in length and must be approved by PHEAA for eligibility in the Pennsylvania State Grant Program. Two academic years is defined as the equivalent of a minimum of 60 semester credits or 1,800 clock hours of instruction (1,500 clock hours in the case of programs leading to the Associate in Specialized Business or Specialized Technology degree). If attending a school that is neither headquartered nor domiciled in Pennsylvania, the program of study must be structured so that at least 50 percent of the total credits/clock hours required for completion are earned through classroom instruction.
Rights and Responsibilities Certification Document

Undergraduate Enrollment - You must be enrolled as an undergraduate on at least a half-time basis and must not have received or completed all requirements for your first baccalaureate or professional degree. Remedial, developmental, or foundation courses may, under certain circumstances, count toward the minimum number of credits necessary for enrollment (contact your financial aid administrator to discuss your circumstances). If attending a school that is neither headquartered nor domiciled in Pennsylvania, at least 50 percent of each term's credits/clock hours must be earned through classroom instruction. If you have a medical disability as defined by the Americans with Disabilities Act (ADA) and you are enrolled in a program of study that is structured to allow you to complete at least 50% of your credits or clock hours in the classroom, you may request an exception to the 50% classroom term enrollment requirement by completing the ADA Accommodation Request Form. This ADA Accommodation Request is only applicable to students attending schools that are neither headquartered nor domiciled in Pennsylvania. Please visit pheaa.org for additional details.

Veteran Status - To be considered a veteran for PA State Grant aid you must have (i) engaged in active service in the United States Armed Forces (Army, Navy, Air Force, Marines, or Coast Guard); or (ii) as an enlistee of the National Guard or Reserves, been activated for duty other than state or training; or (iii) been a cadet or midshipman at one of the service academies. In any event, you must have been released under a condition other than dishonorable, uncharacterized, bad conduct, or other than honorable conditions and, if not a veteran now, will be one by June 30 of the award year for which aid is being requested.

Section III - Privacy, Information on the Privacy Act and Use of Your Social Security Number (SSN)

We require your SSN to verify your identity, process your application, and maintain your record, including your college attendance, progress, and your receipt of PA State Grant funds. If you do not provide your SSN, you will not receive PA State Grant aid. Pennsylvania State Grant applicants are hereby advised that disclosure of their SSN is and has been a requirement and a condition for participation in the Pennsylvania State Grant Program since its inception. PHEAA, without such an identifier, would have difficulty in maintaining proper program records. Section 7(a)(2) of the Privacy Act provides that an agency may continue to require the disclosure of an individual's SSN where the agency required this disclosure under statute or regulations prior to January 1, 1975, in order to verify the identity of the individual. Beginning in 1966 with Form S-1A-66 (First Application), applicants have been required to answer all questions completely or face disqualification for PA State Grant assistance. All subsequent forms utilized by PHEAA contain the SSN or account number as the identifier of the applicant, including PA State Grant award announcements to the student and the institution's financial aid administrator.

PHEAA's Board of Directors on February 27, 1969 adopted regulations including Article IV-Scholarship Program Requirements and Procedures, Section 4.4, dealing with processing of applications, which provides that all requested data must be received for scholarship consideration. Based upon the same legal authority, PHEAA also requires the parent's, stepparent's, and/or spouse's SSN on the application. The parent's, stepparent's, and/or spouse's SSN will be used by PHEAA to obtain family income information from the Pennsylvania Department of Revenue, Bureau of Individual Taxes. The information is necessary for evaluating the applicant's need for PA State Grant aid.

Section IV - Statement of Certification and Authorization

Irrespective of the use of singular or plural pronouns, the following applies to all persons that submit an Application, agree to the "Statement of Certification and Authorization" or accept a PA State Grant award.

By submitting the Application, agreeing to the Statement of Certification and Authorization, or by accepting a PA State Grant award:

(i) I/we authorize PHEAA for any year in which the applicant is considered for PA State Grant aid: to make public announcement of any PA State Grant award, including the institution of attendance and other information categorized as directory information; to disclose your contact information, including your email address, to other state agencies and legislators; to disclose to postsecondary institution(s) selected by the applicant and to others administering financial aid which may bear on eligibility under the application, all information on any application and any information, communication and/or documentation submitted to or acquired by PHEAA at any time, including state and federal tax documents obtained hereunder; to use the data from any application to determine the applicant's eligibility for PA State Grant assistance as necessary; to direct the Director of the Pennsylvania State Department of Revenue, Bureau of Individual Taxes to submit to PHEAA a certified copy or extract of my/our Pennsylvania state income tax return(s) filed for the year(s) designated by PHEAA; and to direct other federal, state and local government agencies to release to PHEAA information in their possession which may bear on my/our eligibility. I/we also agree to submit, or authorize PHEAA to obtain from the District Director of the Internal Revenue Service, a certified copy or extract of my/our federal income tax return(s) and documents for the year(s) designated by PHEAA and that failure to provide such copies or authorization, when requested to do so by PHEAA, may result in ineligibility for PA State Grant aid and the requirement to refund to PHEAA previously awarded PA State Grants. I/we understand that all documents submitted to PHEAA become the property of PHEAA and cannot be returned.

(ii) I/declare under penalty of the criminal laws of the Commonwealth of Pennsylvania that the information provided on the Pennsylvania State Grant Form, as well as any information and documents that I/we have submitted and/or subsequently submit, have been examined by me/us and to the best of my/our knowledge such information is true, correct, and complete. If PHEAA determines subsequent to a PA State Grant award that the applicant was awarded a PA State Grant for which the applicant was not eligible, I/we agree to pay back the entire amount of the PA State Grant. Moreover, if PHEAA determines that the ineligibility resulted from a misrepresentation, I/we agree to pay back to PHEAA not less than three (3) times the amount of the aid received. I/we understand that Pennsylvania law permits PHEAA to seek civil damages and criminal prosecution for such overawards and misrepresentations, which may include monetary fines and imprisonment.

(iii) I, the applicant, authorize and direct the institution at which I am enrolled to release to PHEAA any records or other information in the possession of the institution or any of its officers or agents which relate to my record at their institution or bear upon my eligibility for PA State Grant assistance. If a PA State Grant is awarded, I certify that it will be used only for educational expenses such as tuition, fees, books, room, and board.

(iv) I/we certify authorize PHEAA to use my/our email address or a number for a cellular telephone or other wireless device for communications regarding the PA State Grant Program which may be sent to me/us through email, automated dialing equipment, artificial or prerecorded voice, or text messages.

(v) I/we certify that I have read and reviewed and understand the entire "Rights and Responsibilities Certification Document" and PHEAA's Privacy Policy.
If you have been directed to complete the "Dependent Status Notice" form, you are currently considered a dependent student for PA State Grant purposes and must follow these living situation instructions. Check the box which best identifies the person(s) with whom you resided the most for the 12 months immediately preceding the filing of your FAFSA. If you did not reside with either parent, you must select the parent who provided you with the most support (money, housing, food, car insurance, etc.) during those 12 months. If your legal parent has remarried and the marriage occurred prior to the filing date of your application, select your legal parent and stepparent.

Both Parents may mean your birth or legally adoptive parents (if adopted prior to the age of 13), or one birth parent and one legally adoptive parent, regardless of your parents' marital status.

Mother Only means that your mother is unmarried and only your mother's income should be provided.

Father Only means that your father is unmarried and only your father's income should be provided.

Mother and Stepparent means your mother and non-adoptive stepparent.

Father and Stepparent means your father and non-adoptive stepparent.

* In the Care of a Person (Guardian/Appointed Entity) should be selected if you reside with a relative, foster parents, legal guardian, or a ward of the court or are homeless or residing in a transitional living facility.

* Unmarried and in My Own Care should be selected if you are not residing with either parent and are self-supporting.

*Additional information is required if you answer "In the Care of a Person (Guardian/Appointed Entity)" or "Unmarried and in My Own Care" unless 1) both parents are deceased, 2) you are a veteran, or 3) your date of birth is before January 1, 1998. Please visit pheaa.org/livingsituation for details on what information is required and to determine if you should submit the "Independent Status Notice" instead.

2. Write in the two-letter abbreviation for your current state of legal residence. Residency (domicile) is your true, fixed, and permanent home. If you moved into a state for the sole purpose of attending a college, do not count that state as your legal residence, unless you registered to vote there.

3. Write in the date you became a legal resident of your current state of legal residence. If you have always lived in that state, you may use your date of birth as the date of legal residence.

4. Give the current marital status of the person(s) requested by checking the appropriate status. For example, check married/remarried box if you must give information about your mother and stepfather.

5. Check "No" if you do not have a bachelor's degree from a college and you will not have one by July 1, 2021. Also check "Yes" if you have or will have a degree from a college in another country that is equivalent to a bachelor's degree.

6. Write in either the date that you graduated or expect to graduate from high school or homeschool, or the date that you earned or expect to earn a certificate or diploma through the General Education Development (GED) Program. Leave the date blank if you received a foreign high school, correspondence school, or distance learning diploma, or if you have not graduated from high school. A student achieving a diploma from one of the above will be required to submit documentation to verify that you meet the high school graduation requirement for PA State Grant eligibility.

7. If you were homeschooled, please indicate the name of the homeschool organization that issued your diploma. If you have obtained an Act 196 Home Education Diploma, please indicate such.

8a. Check "No" if you:

- never engaged in active duty in the U.S. Armed Forces,
- are currently an ROTC student,
- are currently a cadet or midshipman at a service academy,
- are a National Guard or Reserves enlistee activated only for training,
- are currently serving in the U.S. Armed Forces and will continue to serve through June 30, 2022.

Check "Yes" if you:

- have engaged in active duty in the U.S. Armed Forces (Army, Navy, Air Force, Marines, or Coast Guard) or as a member of the National Guard or Reserves called to active duty for other than state or training purposes, or were a cadet or midshipman at one of the service academies and were released under a condition other than dishonorable, uncharacterized, bad conduct or other than honorable, or
- are not a veteran now but will be one by June 30, 2022.

9. Dependent Students: List each person, and their relationship to your parent(s)/stepparent, that your parent(s)/stepparent will support between July 1, 2021 and June 30, 2022. Include your parent(s)/stepparent and yourself. Include your parent(s)/stepparent's other children if they receive more than half of their support from your parent(s)/stepparent and will continue to receive more than half of their support from July 1, 2021 through June 30, 2022. Do NOT include any children for whom child support paid has been reported.

Please note that in order for your parent/stepparent to claim that they are providing more than half of someone's support, they must be able to demonstrate that the direct support they 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 other services in addition to actual cash assistance.

Individual personal resources include both taxable and untaxable income such as wages, unemployment compensation, retirement income/distribution, dividend and investment earnings, Social Security benefits, disability payments, and other sources of income.

Independent Students: List each person and their relationship to you, that you will support between July 1, 2021 and June 30, 2022. 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 will continue to receive more than half of their total support from July 1, 2021 through June 30, 2022. Please note that in order for you and your spouse to claim that you are providing more that 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. Please see "Relevant Definitions include" under the dependent students section.
10. **Parent(s):** Write in the number of people from question 9 who will be attending college between July 1, 2021 and June 30, 2022. **Do not include yourselves [the parent(s)].** Always count the student, even if the student will be enrolled less than half-time. Count others only if they will attend at least half-time (six credit hours per term, or at least 12 clock hours per week) in a program that leads to a college degree or certificate.

**Independent Student:** Write in the number of people from question 9, including yourself, who will be attending college between July 1, 2021 and June 30, 2022. Always include yourself, even if you will be enrolled less than half-time. Count others only if they will attend at least half-time (six credit hours per term, or at least 12 clock hours per week) in a program that leads to a college degree or certificate. **Do not include your parent(s).**

11. Check the box which describes the filing status of the 2019 IRS Income Tax Return or a tax return listed in question 12.

1 - Have already completed.
2 - Will file, have not yet completed.
3 - Not going to file (Skip to question 15.)

12. Check the box that represents the income tax return you filed or will file for 2019.

1 - IRS 1040
2 - A foreign tax return (Use the information from your foreign tax return to complete this form. Convert all figures to U.S. dollars, using the exchange rate in effect as of the date your application was filed.)
3 - A tax return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, Northern Marianas Islands, the Republic of the Marshall Islands or the Republic of Palau or the Federated States of Micronesia.

13. If you are currently divorced, separated, or widowed, but completed (or will complete) a joint tax return for 2019, give only your portion of the income. If you are married or remarried and completed (or will complete) joint or separate tax returns for 2019, be sure to include both your income and that of your spouse. Adjusted Gross Income is on IRS form 1040 - line 8b.

14. If you didn't file a 2019 tax return but will be completing one, use your W-2 forms and other records to answer this question.

15. If a 2019 U.S. tax return was not and will not be completed, include earnings from work in 2019. This information may be on the W-2 forms (use federal taxable wages).

If a 2019 U.S. tax return was completed or will be completed, include the "wages, salaries, tips, etc." from Form 1040-line 1 + business or farm income from Schedule 1 lines 3 (Schedule C) + line 6 (Schedule F) + Schedule K-1 (IRS Form 1065) - Box 14 (Code A). If a joint return was completed, report earnings separately. If a business or farm is owned, only add in the positive amounts from Schedule(s) C or F and Box 14 (code A) of IRS Schedule K-1 (Form 1065).

18. **2019 Untaxed Income:**

a. Payments to tax-deferred pension, 401(k), 403(b) etc. savings plans. (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. This includes involuntary contributions.

b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-Schedule 1-total of lines 15 + line 19.

c. Child support received for all children. Don't include foster or adoption payments.

d. Tax exempt interest income from IRS Form 1040-line 2a.

e. Untaxed portions of IRA distributions and pensions from IRS Form 1040-lines 4a minus 4b Exclude rollovers. If negative, enter a zero.

g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.

h. Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

i. Other untaxed income not reported, such as workers' compensation, disability, and the untaxed portion of Health Savings Accounts from form 1040 Schedule 1-line 12. **Don't include** extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefit, Supplemental Security Income, Workforce Innovation and Opportunity ACT educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

19. **2019 Additional Financial Information:**

a. Education credits (American Opportunity and Lifetime Learning tax credits) from IRS Form 1040 Schedule 3-line 3.

b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support received for children in your household, as reported in question 18.

c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

d. Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Combat pay is reported on the W-2 in Box 12, Code Q. Do not include untaxed combat pay.

f. Taxable earnings from work under a cooperative education program offered by a college.

20. Enter the total amount of income tax for 2019. Income tax amount is the total of IRS Form 1040 - line 14 minus Schedule 2 - line 2

21. If you own other real estate (including rental property, land, second or summer homes) or have investments, write in their net worth as of the date the application was filed. Investments include trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, qualified educational benefits or savings accounts such as Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. Investments do not include the home you live in, the value of life insurance and retirement plans (pension funds, qualified annuities, non-education IRAs, Keogh plans, etc.). Please note that debt on the home you live in cannot be considered when determining the net worth of your family's other investments.

21a. Did you include the value of your Pennsylvania 529 College Savings Programs in the investments you reported on your application? If yes, place the amount you reported in question 21a.
22. If you own a business and/or an investment farm, write in your family's portion of the net worth as of the date the application was filed. Include land, buildings, machinery, equipment, inventory, etc. Do not include a family farm that you live on and operate or the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees.

23. Include the balance of cash, checking and savings accounts as of the date the application was filed, if not previously reported.

25-28. Enter the appropriate number on the line provided on the Status Notice. Current status should be reported as of the date the student's application was filed.

<table>
<thead>
<tr>
<th>Number</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Employed/Self-Employed</td>
</tr>
<tr>
<td>5</td>
<td>Deceased</td>
</tr>
<tr>
<td>6</td>
<td>Disabled (permanent and total)</td>
</tr>
<tr>
<td>7</td>
<td>Retired</td>
</tr>
<tr>
<td>8</td>
<td>Not Employed/Homemaker</td>
</tr>
<tr>
<td>9</td>
<td>Whereabouts unknown</td>
</tr>
</tbody>
</table>

32. Write in the complete name (do not abbreviate), address, city and state of the college you plan to attend. If the college is a branch campus, include the complete name of the branch. Also, indicate if it is a specific part of a university, such as a law school.

33. Enter the appropriate number code on the line provided on the Status Notice.

1 - On-campus
2 - Commuter-living with parent(s) or relative(s) other than parent(s)
3 - Off-campus

34. Enter the appropriate number on the line provided on the Status Notice.

1 - Full-time
2 - Full-time evening
3 - Not full-time but at least half-time
4 - Less than half-time
5 - PHEAA use only
6 - Not full-time but at least half-time evening

35. Enter the appropriate number on the line provided on the Status Notice.

1 - 1st year undergraduate
2 - 2nd year undergraduate
3 - 3rd year undergraduate
4 - 4th year undergraduate
5 - 5th year undergraduate
6 - 6th Graduate/Professional
7 - 5th year graduate/Professional
8 - 4th year graduate/Professional

36. If you will attend a college or hospital school of nursing, select the appropriate letter code from the following list and enter it in question 36.

CODES FOR BACHELOR'S DEGREE GRANTING COLLEGES
A - Five-Year Cooperative Work-Study (All Majors)
B - Bachelor's Degree (All Other Majors)
C - Bachelor's Degree (All Other Majors)
G - Two-Year Terminal Program in a Four-Year College or University
H - Program of Less Than Two Academic Years
I - College Transferable Program

CODES FOR TWO-YEAR PUBLIC AND TWO-YEAR PRIVATE COLLEGES
I - College Transferable Program
J - Two-Year Terminal Program - Credits Not Transferable to a Four-Year College
K - Program of Less Than Two Academic Years

CODES FOR HOSPITAL SCHOOLS OF NURSING
L - Registered Nursing Program
M - All Other Programs

CODES FOR BUSINESS, TRADE, AND TECHNICAL COLLEGES
If you will attend a business, trade or technical college, write the program of study name in question 36 on the line provided. If the college is listed on the enclosed code list for question 36, also enter the appropriate program code. If the college and/or program is not listed, enter the name of the program and leave the code line blank.

37. Read and Sign - The student must sign the 2021-22 PA State Grant Status Notice. If information was provided for both parents, at least one of the student's parents must also sign this form. If data is provided for only one parent, that parent must sign. Everyone signing this form is certifying that all information is correct and that they are willing to provide documents to prove that all information provided pursuant to the PA State Grant application is correct. Such documents may include U.S., state, or local tax returns.

Sending in the Pennsylvania State Grant Status Notice

Double-check the form and make sure you completed only the questions requested. Be sure the form has the necessary signatures. You should keep the instruction pages and a copy of your completed PA State Grant Status Notice for future reference. If appropriate, include only the letter requested under “Living Situation” (visit www.pheaa.org/livingsituation). Do not send tax forms or other materials in the envelope. This will slow down processing. All other questions or correspondence should be mailed to PHEAA, State Grant and Special Programs, P.O. Box 8157, Harrisburg, PA 17105-8157.
<table>
<thead>
<tr>
<th>Institution</th>
<th>Program Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL STATE CAREER SCHOOL</td>
<td>7D - Dental Hygiene</td>
</tr>
<tr>
<td>ASPIRA CITY COLLEGE</td>
<td>64 - Computer Technology/Software Option</td>
</tr>
<tr>
<td>BERKS TECHNICAL INSTITUTE, Wyomissing</td>
<td>8T - Practical Nursing</td>
</tr>
<tr>
<td>CENTRAL PENNSYLVANIA INSTITUTE OF SCIENCE AND TECHNOLOGY, Pleasant Gap</td>
<td>7G - Heavy Diesel Construction</td>
</tr>
<tr>
<td>COMMONWEALTH TECHNICAL INSTITUTE, Johnstown</td>
<td>7D - Dental Lab Technology AST</td>
</tr>
<tr>
<td>DOUGLAS SCHOOL OF BUSINESS, Monessen</td>
<td>61 - Tom Savini's Special Make-Up Effects</td>
</tr>
<tr>
<td>ERIE INSTITUTE OF TECHNOLOGY</td>
<td>7J - Web Design and Social Media Marketing</td>
</tr>
<tr>
<td>FORTIS INSTITUTE, Scranton</td>
<td>7H - Dental Hygiene</td>
</tr>
<tr>
<td>GREAT LAKES INSTITUTE OF TECHNOLOGY, Erie</td>
<td>7M - Diagnostic Medical Sonographer</td>
</tr>
<tr>
<td>INSTITUTE OF MEDICAL CAREERS, Erie</td>
<td>7M - Medical Assisting Technician</td>
</tr>
<tr>
<td>INSTITUTE OF MEDICAL CAREERS - MAIN, Pittsburgh</td>
<td>7M - Medical Assisting Technician</td>
</tr>
<tr>
<td>JNA INSTITUTE OF CULINARY ARTS, Philadelphia</td>
<td>96 - Culinary Arts/Restaurant Management</td>
</tr>
<tr>
<td>LANSDALE SCHOOL OF BUSINESS, North Wales</td>
<td>63 - Business Administration/Office Operations Management</td>
</tr>
<tr>
<td>LAUREL BUSINESS INSTITUTE, Inc., Uniontown</td>
<td>75 - Dental Hygiene</td>
</tr>
<tr>
<td>LAUREL TECHNICAL INSTITUTE, Inc., Meadville</td>
<td>78 - Early Childhood Education</td>
</tr>
<tr>
<td>LAUREL TECHNICAL INSTITUTE, Inc., Sharon</td>
<td>7M - Dental Laboratory Technician</td>
</tr>
<tr>
<td>LINCOLN TECHNICAL INSTITUTE, Allentown</td>
<td>8L - Diesel Technology</td>
</tr>
<tr>
<td>LINCOLN TECHNICAL INSTITUTE, Pittsburgh</td>
<td>8B - Automotive Technology</td>
</tr>
<tr>
<td>LINCOLN TECHNICAL INSTITUTE, Johnstown</td>
<td>7D - Criminal Justice</td>
</tr>
<tr>
<td>LINCOLN TECHNICAL INSTITUTE, Torresdale</td>
<td>7A - Automotive Service Management</td>
</tr>
<tr>
<td>MCCANN SCHOOL OF BUSINESS, Allentown</td>
<td>7D - Medical Laboratory Technician</td>
</tr>
<tr>
<td>MCCANN SCHOOL OF BUSINESS, Lewisburg</td>
<td>7N - Electronic Health Records</td>
</tr>
<tr>
<td>NEW CASTLE SCHOOL OF TRADES, New Castle</td>
<td>7G - Construction Trades</td>
</tr>
<tr>
<td>PENN COMMERCIAL BUSINESS/TECHNICAL SCHOOL, Philadelphia</td>
<td>8C - Automotive Technology</td>
</tr>
<tr>
<td>PENN COMMERCIAL BUSINESS/TECHNICAL SCHOOL, Pittsburgh</td>
<td>8A - Body, Paint &amp; Mechanical Technology</td>
</tr>
<tr>
<td>PITTSBURGH CAREER INSTITUTE, Pittsburgh</td>
<td>8G - Diagnostic Sonographer</td>
</tr>
<tr>
<td>PITTSBURGH INSTITUTE OF AERONAUTICS, Pittsburgh</td>
<td>8E - Online Funeral Services Arts &amp; Sciences</td>
</tr>
<tr>
<td>PITTSBURGH INSTITUTE OF MORTUARY SCIENCE</td>
<td>8K - Funeral Services Arts &amp; Sciences</td>
</tr>
<tr>
<td>PITTCOM CENTER, Wyncote, PA</td>
<td>7T - Practical Nursing</td>
</tr>
<tr>
<td>ROSEDALE TECHNICAL COLLEGE, Pittsburgh</td>
<td>8B - Automotive Technology</td>
</tr>
</tbody>
</table>

*PROGRAM CODES ARE UNDER EACH INSTITUTION'S NAME*
<table>
<thead>
<tr>
<th>Business School</th>
<th>Location</th>
<th>Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Hills School of Business and Technology, Altoona</td>
<td>Altoona</td>
<td>7T - Medical Assistant, 7X - Criminal Justice, 64 - Administrative Professional, 65 - Information Technology, 85 - Business Administration/Accounting, 87 - Business Administration/Management &amp; Marketing, 89 - Admin Medical Assistant, 92 - Health Information Technology</td>
</tr>
<tr>
<td>South Hills School of Business and Technology, State College</td>
<td>State College</td>
<td>7T - Medical Assistant, 7X - Criminal Justice, 64 - Administrative Professional, 65 - Information Technology, 73 - Business Administration/Management &amp; Marketing, 76 - Software Development &amp; Programming, 83 - Engineering Technology, 85 - Business Administration/Accounting, 89 - Admin Medical Assistant, 92 - Health Information Technology</td>
</tr>
<tr>
<td>Studio Incamminati, Philadelphia, PA</td>
<td>Philadelphia, PA</td>
<td>60 - Advanced Fine Art</td>
</tr>
<tr>
<td>Universal Technical Institute, Exton</td>
<td>Exton</td>
<td>8A - Automotive Technology w/FACT, 8B - Automotive/Diesel &amp; Industrial Technology, 8C - Automotive/Diesel &amp; Industrial Technology w/FACT</td>
</tr>
<tr>
<td>VET TECH Institute, Pittsburgh</td>
<td>Pittsburgh</td>
<td>9J - Veterinary Technician</td>
</tr>
<tr>
<td>WVJC - United Career Institute, Mount Braddock and Irwin Campuses</td>
<td>Mount Braddock and Irwin</td>
<td>89 - Medical Assisting, 92 - Medical Office Administration</td>
</tr>
<tr>
<td>YTI Career Institute, Altoona</td>
<td>Altoona</td>
<td>8U - Respiratory Therapy</td>
</tr>
<tr>
<td>YTI Career Institute, Lancaster</td>
<td>Lancaster</td>
<td>7X - Criminal Justice &amp; First Response, 9G - Culinary Arts/Restaurant Management, 91 - Health Information Technology, 92 - Medical Assistant</td>
</tr>
</tbody>
</table>