

# NON-FAFSA PARENT RESOURCE EVALUATION QUESTION GUIDE



## PARENT INFORMATION

Question	Instructions
What is your relationship to the student?	<p>Report your relationship to the student.</p> <ul style="list-style-type: none"> <li>● Biological father if the parent is the student's biological father.</li> <li>● Biological mother if the parent is the student's biological mother.</li> <li>● Adoptive father if the parent is the student's adoptive father.</li> <li>● Adoptive mother if the parent is the student's adoptive mother.</li> </ul>
Your Date of Birth	<p>The date of birth entered by the parent when logging into this form is pre-populated and cannot be changed.</p>
Do you (or your spouse, if married) own all or part of a business/farm?	<ul style="list-style-type: none"> <li>● YES, if the parent and/or spouse owns all or part of a business or farm.</li> <li>● NO, if the parent and/or spouse does not own all or part of a business or farm.</li> </ul>
What is your current marital status?	<p>Report your current marital status, as of today.</p> <ul style="list-style-type: none"> <li>● MARRIED if the parent is currently married/remarried to someone other than the student's other biological/adoptive parent.</li> <li>● SEPARATED if the parent is currently married but is considered legally separated, or the couple chooses to live separate lives (reside in separate households as though not married).</li> <li>● DIVORCED if the parent is legally divorced.</li> <li>● WIDOWED if the parent's spouse is deceased and the parent is not remarried.</li> <li>● SINGLE if the parent is currently not married/remarried, and divorced or widowed status does not apply.</li> </ul>
Are you (or your spouse, if married) a Dislocated Worker?	<p>YES, if the parent and/or spouse:</p> <ul style="list-style-type: none"> <li>● Is receiving unemployment benefits due to being laid off or losing a job, and is unlikely to return to their previous occupation;*</li> <li>● Has been laid off or received a lay-off notice from a job;</li> <li>● Was self-employed but is now unemployed due to economic conditions or natural disaster;</li> <li>● Is the spouse of an active-duty member of the Armed</li> </ul>

	<p>Forces and has experienced a loss of employment because of relocating due to a permanent change in duty station;</p> <ul style="list-style-type: none"> <li>• Is the spouse of an active-duty member of the Armed Forces and is unemployed or underemployed, and is having trouble obtaining or upgrading employment; or</li> <li>• Is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (for example, a stay-at-home mom or dad), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.</li> </ul> <p><i>* Except for the spouse of an active-duty member of the Armed Forces, a person who voluntarily resigns from their employment (quits) is generally not considered a dislocated worker even if they are receiving unemployment benefits.</i></p> <p>NO, if the parent and/or spouse does not meet any of the general criteria listed above.</p>
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## SPOUSE INFORMATION

Only complete this section if the parent's reported marital status is married.

Question	Instructions
Spouse's Name	Report the full name of the parent's spouse.
Do they own all or part of a business/farm?	<ul style="list-style-type: none"> <li>• YES, if the parent's spouse owns all or part of a business/farm.</li> <li>• NO, if the parent's spouse does not own all or part of a business/farm.</li> </ul>

## HOUSEHOLD INFORMATION (REFERRED TO AS FAMILY SIZE EFFECTIVE FALL 2024)

Question	Instructions
Enter the number of people in your household (family size).	<p>Include:</p> <ul style="list-style-type: none"> <li>• Yourself</li> <li>• Your spouse (if married)</li> <li>• The student</li> <li>• Your other children (even if they do not live with you), if you</li> </ul>

	<p>will provide more than half of their support between July 1, 2024, and June 30, 2025</p> <ul style="list-style-type: none"> <li>• Other people if they currently live with you and you will provide more than half of their support between July 1, 2024, and June 30, 2025</li> </ul> <p><i>* If your family size has changed since filing your 2022 U.S. federal income tax return, enter that number instead.</i></p>
<p>Enter the number of people included in your family size (as indicated above) who will be in college.</p>	<p>This should only include people who were included in the parent's family size (as indicated above), who will be in college between July 1, 2024 and June 30, 2025, enrolled at least half-time in a program that leads to a college degree or certificate.</p> <p>Do not include:</p> <ul style="list-style-type: none"> <li>• Yourself, your spouse, or any children enrolled at U.S. military service academies.</li> </ul>

## INCOME INFORMATION

*NOTE: If the parent and/or spouse worked and earned income in a foreign country in 2022, the foreign income should be converted to U.S. dollars and reported in this form.*

Question	Instructions
<p>Have you completed (or will you complete) a federal IRS 1040 income tax return for 2022?</p>	<ul style="list-style-type: none"> <li>• YES, if the parent has already completed (or will complete) a 2022 income tax return.</li> <li>• NO, if the parent was not required to complete a 2022 income tax return and will not file.</li> </ul>
<p>Your income earned from work</p>	<p>Report the parent's total wages, salaries, tips, etc. for 2022.</p> <p><i>On the 2022 federal IRS 1040 form, this information may be found on Line 1z. If you have any amounts listed in the supplemental tax schedules listed below, add them to the amount on Line 1z:</i></p> <ul style="list-style-type: none"> <li>• <i>Schedule 1, Line 3 – Business income (or loss)</i></li> <li>• <i>Schedule 1, Line 6 – Farm income (or loss)</i></li> <li>• <i>Schedule K-1 (Form 1065), Box 14, Code A – Net earnings from self-employment</i></li> </ul> <p><i>If you were not required to file a 2022 federal IRS 1040 income tax return, this information may be found on Form W-2, Box 1 – Wages, tips, other compensation.</i></p> <p><i>If any individual line item described above is a negative number, exclude from the total.</i></p>

<p>Your spouse's income earned from work</p>	<p>Report your spouse's total wages, salaries, tips, etc. for 2022.</p> <p><i>On the 2022 federal IRS 1040 form, this information may be found on Line 1z. If your spouse has any amounts listed in the supplemental tax schedules listed below, add them to the amount on Line 1z:</i></p> <ul style="list-style-type: none"> <li>● <i>Schedule 1, Line 3 – Business income (or loss)</i></li> <li>● <i>Schedule 1, Line 6 – Farm income (or loss)</i></li> <li>● <i>Schedule K-1 (Form 1065), Box 14, Code A – Net earnings from self-employment</i></li> </ul> <p><i>If your spouse was not required to file a 2022 federal IRS 1040 income tax return, this information may be found on Form W-2, Box 1 – Wages, tips, other compensation.</i></p> <p><i>If any individual line item described above is a negative number, exclude from the total.</i></p>
<p>Adjusted Gross Income</p>	<p>Report the total amount of the parent's adjusted gross income (AGI) as shown on the 2022 federal IRS 1040 income tax return.</p> <p><i>On the 2022 federal IRS 1040 form, this information may be found on Line 11.</i></p> <p>If the parent is married but filed a separate tax return from their spouse for 2022:</p> <ul style="list-style-type: none"> <li>● Add both AGIs together.</li> </ul> <p>If the parent is separated, divorced, widowed, or single:</p> <ul style="list-style-type: none"> <li>● Report only the AGI from the parent's 2022 tax return.</li> </ul>
<p>Taxes Paid</p>	<p>Report the total income tax paid for 2022.</p> <p><i>On the 2022 federal IRS 1040 form, this information may be found on Line 22. Subtract any amount listed on Schedule 2, Line 2 (if applicable).</i></p> <p>If the parent is married but filed a separate tax return from their spouse for 2022:</p> <ul style="list-style-type: none"> <li>● Add both income tax paid amounts together.</li> </ul> <p>If the parent is separated, divorced, widowed, or single:</p> <ul style="list-style-type: none"> <li>● Report only the income tax paid from the parent's 2022 tax return.</li> </ul>

<p>Your Untaxed Income for 2022</p>	<p>The parent should report the total amount of any other untaxed income or benefits they received in 2022. <i>Information about where this information may be found on the 2022 federal IRS 1040 form or specific tax schedule forms is listed in parentheses.</i></p> <p>Include ONLY:</p> <ul style="list-style-type: none"> <li>● Deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans (Schedule 1, sum of lines 16 + 20)</li> <li>● Tax-exempt interest income (Form 1040, line 2a)</li> <li>● Untaxed portions of IRA distributions, excluding rollovers (Form 1040, line 4a minus 4b)</li> <li>● Untaxed portions of pensions (Form 1040, line 5a minus 5b)</li> <li>● Foreign earned income exclusion (Schedule 1, line 8d)</li> </ul>
<p>Your Spouse's Untaxed Income for 2022</p>	<p>The parent should report the total amount of any other untaxed income or benefits their <b>spouse</b> received in 2022.</p> <p><i>Information about where this information may be found on the 2022 federal IRS 1040 form or specific tax schedule forms is listed in parentheses.</i></p> <p>Include ONLY:</p> <ul style="list-style-type: none"> <li>● Deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans (Schedule 1, sum of lines 16 + 20)</li> <li>● Tax-exempt interest income (Form 1040, line 2a)</li> <li>● Untaxed portions of IRA distributions, excluding rollovers (Form 1040, line 4a minus 4b)</li> <li>● Untaxed portions of pensions (Form 1040, line 5a minus 5b)</li> <li>● Foreign earned income exclusion (Schedule 1, line 8d)</li> </ul>
<p>Please select all federal benefits received by you or any other members of your household in calendar years 2022 or 2023. If not applicable, skip this question.</p> <ul style="list-style-type: none"> <li>● Free or reduced-price school lunch</li> <li>● Medicaid</li> <li>● Supplemental Nutrition Assistance Program (SNAP)</li> <li>● Supplemental Security Income (SSI)</li> </ul>	<p>Click the radio buttons to confirm if you or anyone in your family received benefits from any of the programs listed in the 2022 or 2023 calendar year. If not applicable, skip this question.</p>

<ul style="list-style-type: none"> <li>• Temporary Assistance for Needy Families (TANF)</li> <li>• Special Supplemental Nutrition Program for Women, Infants, and Children (WIC).</li> </ul>	
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**ASSET INFORMATION**

*Note: Amounts reported must be as of today, in U.S. dollars.*

Question	Instructions
<p>What is the total amount in your cash, savings, and checking accounts (as of today)?</p>	<p>Report the total combined amount of the parent’s (and spouse’s, if applicable) cash-on-hand, and current balances of all savings and checking accounts as of today.</p>
<p>What is the total value of your assets held in the names of your (and if married, your spouse’s) children other than the student, who are under age 19 and not college students?</p>	<p>The parent should report only funds that are held in custodial brokerage or investment accounts by the parent (or spouse), in the name(s) of the student’s siblings who are under the age of 19 and not enrolled in college. Do not include assets for which the student’s sibling is not the account beneficiary.</p> <p>Examples may include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• UGMA/UTMA accounts, 529 or Coverdell Education Savings Plans, custodial Roth IRAs</li> </ul>
<p>What is the net worth of your (and if married, your spouse’s) other investments? Net worth means current market value minus any debts owed against them.</p>	<p>The parent should report the net worth (current market value minus any debt owed) of investments owned by the parent (and parent’s spouse, if married) as of today.</p> <ul style="list-style-type: none"> <li>• If any assets are owned jointly with someone other than the parent’s spouse, report the portion belonging to the parent only.</li> </ul> <p>Investments include:</p> <ul style="list-style-type: none"> <li>• Trust funds, mutual funds, money market funds, certificates of deposit (CD), stocks, stock options, bonds, commodities, precious metals, virtual currency (cryptocurrency)</li> </ul> <p>DO NOT include:</p> <ul style="list-style-type: none"> <li>• The value of possessions such as a car for personal use, electronics, clothing, furniture</li> <li>• The value of your principal place of residence, even if it is part of a business or farm property</li> <li>• The value of retirement and life insurance plans, such as 401(k), IRA, or ABLE accounts</li> </ul>

<p>What is the net worth of your (and if married, your spouse's) other real estate investments? Do not include the home you live in. Net worth means current market value minus any debts owed against them.</p>	<p>The parent should report the net worth (current market value minus any debts owed) of all real estate investments as of today.</p> <p>Include:</p> <ul style="list-style-type: none"> <li>● Residential and commercial real estate including land, second or summer vacation homes, timeshares.</li> <li>● Rental property, if the unit has its own entrance, kitchen, and bath, and is rented to someone other than a family member.</li> </ul> <p>DO NOT include:</p> <ul style="list-style-type: none"> <li>● The value of your principal place of residence, or any rented room within it.</li> </ul>
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## BUSINESS/FARM INFORMATION

*Note: Amounts reported must be as of today, in U.S. dollars.*

Question	Instructions
<p>What is the net worth of your (and if married, your spouse's) business(es)?</p>	<p>The parent should report the net worth (current market value minus any debts owed) of all business(es) they own/operate as of today, regardless of the size of the enterprise or number of employees.</p> <p>Include:</p> <ul style="list-style-type: none"> <li>● The value of land, buildings, machinery, equipment, inventory, etc.</li> </ul>
<p>What is the net worth of your (and if married, your spouse's) farm(s)?</p>	<p>The parent should report the net worth (current market value minus any debts owed) of all farms they own/operate as of today, regardless of the size of the enterprise or number of employees.</p> <p>Include:</p> <ul style="list-style-type: none"> <li>● The value of land, buildings, machinery, equipment, inventory, unharvested crops, livestock, etc.</li> </ul>