

Worksheet for the
California Dream Act Application
www.CalDreamAct.org



Do Not Mail this Worksheet

The California Dream Act Application is the financial aid application for AB 540 eligible students. Complete this worksheet before completing the Dream Act Application to make sure you have all of the information you will need to complete the Dream Act Application. Complete application instructions and the Dream Act Application are online at www.caldreamact.org. Be sure to complete the correct year application. Use the 2013-14 year application for 2013-14 year assistance.

The California Dream Act Application can only be completed by students who meet the following qualifications:

- Students who cannot file the Free Application for Federal Student Aid (FAFSA), and
- Students who attended at least three full years in a California public or private high school, and
- Students who graduated from a California high school or attained the equivalent prior to the start of the college term, for example a High School Equivalency Certificate from the California GED Office or Certificate of Proficiency resulting from the California High School Proficiency Exam (CHSPE), and
- Students who, if they are without lawful immigration status, have or will file an affidavit with the college or university they are attending stating that they have filed an application to legalize their immigration status, or will file an application as soon as they are eligible to do so. This affidavit is filed with the college they attend.

If you meet these requirements, use this worksheet as a guide on how to answer the questions when you fill out the Dream Application. The Dream Act Application is online at www.caldreamact.org. The California Student Aid Commission processes the Dream Act Application. Any financial aid received can only be used at eligible California institutions.

Assembly Bill (AB) 540 was passed in 2001 to allow non-resident students in California to pay resident fees at California's public colleges and universities. In October 2011, AB131 was signed into law and allows students eligible for AB540 to also apply for state financial aid like the University of California Grants, State University Grants and Board of Governor's fee waivers, and Cal Grants. Students must verify with their college on the financial aid filing requirements at that college.

The Dream Act Application is not an application for federal financial aid. Students eligible to file the Free Application for Federal Student Aid (FAFSA) must file the FAFSA on-line at www.fafsa.gov. Students should not complete both applications.

Need Help?

For help with getting answers for this worksheet, go to
www.caldreamact.org or call 888-224-7268, 10:00 am to 4:45 pm.
Monday through Friday

Applying by the Deadlines

Submit your Dream Act Application as early as possible. For the 2013-14 school year, the State Cal Grant program has a March 4, 2013 filing deadline. A school certified GPA verification form available at www.caldreamact.org is also required for the Cal Grant program. Many colleges and universities also use March 4 as a priority deadline but you must check with your college to determine their application deadlines and filing requirements.

You may also need to complete additional forms. Check with your high school guidance counselor or a financial aid administrator at your college about state and college sources of student aid. If you are filing close to one of these deadlines, we recommend you file online at www.caldreamact.org. This is the fastest and easiest way to apply for aid.

Using Your Tax Return

If you (or your parents) will file a 2012 income tax return with the Internal Revenue Service (IRS), we recommend that you complete it before filling out the Dream Act Application. If you have not completed your return yet, you can still submit your Dream Act Application now using estimated tax information and then correct that information after you file your return. Do not miss any of your colleges' deadlines. If you or your parents will file an income tax return, you will need the tax returns and/or W-2 forms to complete the Dream Act Application.

Filling out the Dream Application

If you or your family have unusual circumstances that might affect your financial situation, such as loss of employment, complete this form to the extent you can. Then, submit it as instructed and consult with the financial aid office at the college you plan to attend.

After you complete this worksheet, go online to www.caldreamact.org and complete the Dream Act Application. **Do not mail this worksheet.** After your application is processed, you will be able to see your responses at www.caldreamact.org. If you would like to make changes to your Dream Act Application, log-in at www.caldreamact.org.

SECTION 1 - STUDENT INFORMATION

Do not mail this worksheet. Use it only to collect information before filing the Dream Act Application online at www.caldreamact.org. You can add up to ten colleges on the online Dream Act Application. The colleges you list will automatically receive the information from your processed Dream Act Application. The Dream Act Application is only for colleges located in California.

Student's Last Name**First Name****Middle Initial**

Your full name (**exactly as it appears on school records**) If your name has a suffix, such as Jr. or III, include a space between your last name and suffix.

Your Individual Taxpayer Identification Number (ITIN) If you have one.

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Student Citizenship Status

Check one of the following:

- ☐ I am a U.S. citizen (U.S. national) ☐ I am not a citizen or eligible noncitizen.
☐ I am an eligible noncitizen.
 (Read Below)

Alien Registration Number (If you have one)

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You are an eligible noncitizen if you are:

- (1) a permanent U.S. resident with a Permanent Resident Card (I-551)
 (2) a conditional permanent resident with a Conditional Green Card (I-551C)
 (3) the holder of an Arrival-Departure Record (I-94) from the Department of Homeland Security showing any one of the following designations: "Refugee," "Asylum Granted," "Parolee" (I-94 confirms that you were paroled for a minimum of one year and status has not expired), T-Visa holder (T-1, T-2, T-3, etc.) or "Cuban-Haitian Entrant"
 (4) the holder of a valid certification or eligibility letter from the Department of Health and Human Services showing a designation of "Victim of human trafficking." You are also considered an eligible noncitizen if you are a person who is considered a Battered Immigrant-Qualified Alien. Eligible non-citizens, as described above, should file the federal FAFSA application at www.fafsa.gov

Student marital status Check one of the following:

- ☐ Single ☐ I am separated ☐ I am married/remarried ☐ I am divorced or widowed

 Are you male or female? MALE ☐ FEMALE ☐

Most males must register with the Selective Service System to receive state and federal financial aid. If you are not registered, visit the Selective Service System at www.sss.gov to find out if you need to register.

Some financial aid is offered based on the level of schooling your parents completed.

- Highest school your father completed: Middle school/Jr. high ☐ High school ☐ College or beyond ☐ Other/unknown ☐
 Highest school your mother completed: Middle school/Jr. high ☐ High school ☐ College or beyond ☐ Other/unknown ☐

Section 2 DEPENDENCY STATUS Check any that apply to you.

<input type="checkbox"/> I was born before January 1, 1990	<input type="checkbox"/> I am married	<input type="checkbox"/> I will be working on a master's or doctorate program (e.g. MA, MBA, MD, JD, PhD, EdD, graduate certificate)	
<input type="checkbox"/> I am serving on active duty in the U.S. Armed Forces	<input type="checkbox"/> I am a veteran of the U.S. Armed Forces	<input type="checkbox"/> I have children and I provide more than half of their support	
<input type="checkbox"/> Both of my parents are deceased	<input type="checkbox"/> I was in foster care at any time since turning age 13	<input type="checkbox"/> I have dependents (other than children or my spouse) who live with me and I provide more than half of their support	
<input type="checkbox"/> I was a dependent or ward of the court at any time since turning age 13	<input type="checkbox"/> I am currently or I was an emancipated minor	<input type="checkbox"/> I am currently or I was in legal guardianship	<input type="checkbox"/> I am homeless or I am at risk of being homeless

Section 3 - PARENT INFORMATION

Who is considered a parent? "Parent" refers to a biological or adoptive parent. Grandparents, foster parents, legal guardians, siblings, and uncles or aunts are not considered parents on this form unless they have legally adopted you. In case of divorce or separation, give information about the parent you lived with most in the last 12 months. If you did not live with one parent more than the other, give information about the parent who provided you the most financial support during the last 12 months or during the most recent year you received support. If your divorced or widowed parent has remarried, also provide information about your stepparent.

Providing your father's information? You will need:

Father's/Stepfather's Social Security Number (if he has one)
 Father's/Stepfather's Individual Taxpayer Identification Number (ITIN), if he has one
 Father's/Stepfather's name
 Father's/Stepfather's date of birth
☐ Check here if your father/stepfather is a dislocated worker

Providing your mother's information? You will need:

Mother's/Stepmother's Social Security Number (if she has one)
 Mother's/Stepmother's Individual Taxpayer Identification Number (ITIN), if she has one
 Mother's/Stepmother's name
 Mother's/Stepmother's date of birth
☐ Check here if your mother/stepmother is a dislocated worker

Did your parents file or will they file a 2012 income tax return?

- ☐ My parents have already completed a tax return
☐ My parents will file, but have not yet completed a tax return
☐ My parents are not going to file an income tax return

If your parents will file a 2012 income tax return, they will need their tax returns and/or W-2 forms to complete the Dream Application.
 If your parents will not be filing an income tax return, they will total the wages they have been paid for the 2012 year.

What was your parents' adjusted gross income for 2012?

Skip this question if your parents did not file taxes. Adjusted gross income is on IRS Form 1040—Line 37; 1040A—line 21; or 1040EZ—line 4.

\$

The following questions ask about earnings (wages, salaries, tips, etc.) in 2012. Answer whether or not a tax return was filed. This information may be on the W-2 forms, or your parents may have to total the wages they have been paid for the year.

How much did your father/stepfather earn from working in 2012?

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How much did your mother/stepmother earn from working in 2012?

\$

Parents Asset Questions:

- As of the date you complete the Dream Application, what is your parents' total current balance of cash, savings and checking accounts?
- As of the date you complete the Dream Application, what is the net worth of your parents' investments, including real estate? Don't include the home in which your parents live. Net worth means current value minus debt.
- As of the date you complete the Dream Application, what is the net worth of your parents' current businesses and/or investment farms? Don't include farms or family businesses with 100 or fewer full-time or full-time equivalent employees.

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In 2011 or 2012, did anyone in your parents' household receive: (Check all that apply.)

- ☐ Supplemental Security Income (SSI) ☐ Temporary Assistance for Needy Families or TANF. (CalWorks in California)
☐ Food Stamps ☐ Special Supplemental Nutrition Program for Women, Infants and Children (WIC)
☐ Free or Reduced Price School Lunch

Note: In California, TANF is called CalWorks. The Food Stamp program is called Cal Fresh.

Did your parents have any of the following items in 2012?

Check all that apply. Once online, you may be asked to report amounts paid or received by your parents.

Additional Financial Information

- ☐ American Opportunity, Hope or Lifetime Learning tax credits
☐ Child support paid
☐ Taxable earnings from work-study, assistantships or fellowships
☐ Taxable grant and scholarship aid reported to the IRS
☐ Combat pay or special combat pay
☐ Cooperative education program earnings

Untaxed Income

- ☐ Payments to tax-deferred pension and savings plans
☐ Child support received
☐ IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
☐ Tax exempt interest income
☐ Untaxed portions of IRA distributions

- ☐ Untaxed portions of pension distributions
☐ Housing, food and other living allowances paid to members of the military, clergy and others
☐ Veterans noneducation benefits
☐ Other untaxed income not reported, such as workers' compensation or disability

Section 4 - STUDENT INFORMATION**Did you file or will you file a 2012 income tax return?**

- ☐ I have already completed a tax return
- ☐ I will file, but have not yet completed a tax return
- ☐ I am not going to file an income tax return

If you will file a tax form, you will need your tax returns and/or W-2 forms to complete the Dream Application.

What was your (and spouse's) adjusted gross income for 2012?

Skip this question if you or your spouse did not file taxes. Adjusted gross income is on IRS Form 1040—Line 37; 1040A—line 21; or 1040EZ—line 4.

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The following questions ask about earnings (wages, salaries, tips, etc.) in 2012. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on the IRS Form 1040—Line 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1.

How much did you earn from working in 2012?

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- ☐ Check here if you are a dislocated worker

How much did your spouse earn from working in 2012?

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- ☐ Check here if your spouse is a dislocated worker

Student Asset Questions:

- As of the date you complete the Dream Application, what is the current total balance of your cash, savings and checking accounts?
- As of the date you complete the Dream Application, what is the net worth of your investments, including real estate? Don't include the home in which you live. Net worth means current value minus debt.
- As of the date you complete the Dream Application, what is the net worth of your current businesses and/or investment farms? Don't include farms or family businesses with 100 or fewer full-time or full-time equivalent employees.

\$

\$

\$

In 2011 or 2012, did anyone in your household receive: (Check all that apply.)

- ☐ Supplemental Security Income (SSI) ☐ Temporary Assistance for Needy Families or TANF. (CalWorks in Calif.)
- ☐ Food Stamps ☐ Special Supplemental Nutrition Program for Women, Infants and Children (WIC)
- ☐ Free or Reduced Price School Lunch

Note: In California, TANF is called CalWorks. The Food Stamp program is called Cal Fresh.

Did you (and/or your spouse) have any of the following items in 2012?

Check all that apply. Once online, you may be asked to report amounts paid or received by your parents.

Additional Financial Information

- ☐ American Opportunity, Hope or Lifetime Learning tax credits
- ☐ Child support paid
- ☐ Taxable earnings from work-study, assistantships or fellowships
- ☐ Taxable grant and scholarship aid reported to the IRS
- ☐ Combat pay or special combat pay
- ☐ Cooperative education program earnings

Untaxed Income

- ☐ Payments to tax-deferred pension and savings plans
- ☐ Child support received
- ☐ IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- ☐ Tax exempt interest income
- ☐ Untaxed portions of IRA distributions

- ☐ Untaxed portions of pension distributions
- ☐ Housing, food and other living allowances paid to members of the military, clergy and others
- ☐ Veterans noneducation benefits
- ☐ Other untaxed income not reported, such as workers' compensation or disability

Complete Dream Act Application instructions are online at www.caldreamact.org.

NOTES:

Do not mail this Worksheet. Go to www.caldreamact.org to complete and submit your application.

You can also talk with your college's financial aid office about other types of student aid that may be available.

Financial aid determined from the Dream Act Application is only for use at California colleges.