CSS Profile Walkthrough

uAspire

[As people are arriving, first 2-3 minutes]: Hello everyone! We're going to give folks a few more minutes to arrive before we begin. Thank you for coming and we'll get started soon.

Hello and thank you for joining this virtual CSS Profile Walkthrough hosted by uAspire. I am (presenter name) and I am being supported during this presentation by my colleague, (driver name).

I'll share a few notes before we begin:

- First, please make sure to ask all questions using the Q&A feature on your Zoom toolbar. (Driver name) will be answering them in live time as they are able, but also may refer you to one of our follow-up support resources that we will get to at the end of today's presentation.
- In addition, we will be sending those who registered a PDF of the slides with hyperlinks to important sites, tools and helpful videos referenced.
- Lastly, we will ask you to complete a brief poll to get your feedback on today's session before we close out with some time for more

- Q&A.

This is our agenda for our time together:
- First, we will take a look at what you should do prior to sitting down and completing the CSS Profile.
- Next, we will look at the sections of the CSS Profile and provide some tips and tricks to make filling out the CSS Profile as easy as possible.
- We will let you know some of the common next steps students have after completing the CSS Profile and how you can get additional one-on-one support form uAspire.
- And finally, we will end with a quick survey and some live question and answer time
- **[CLICK ONCE]** This icon will be seen throughout the presentation and indicates a link you can explore further after the presentation. Keep a lookout for it, as you will get a copy of the slides in our follow up email so that you can access these links.

What is the CSS Profile?

- A financial aid form by the College Board that some colleges require
- Used for institutional aid eligibility
- Costs $ to submit, but fee waivers are available
  - $9 application fee + $16/college
  - Unlimited fee waivers for eligible students

Complete it online here!

Domestic undergraduate students may submit CSS Profile for free if:

- Family adjusted gross income is up to $100,000
- The student qualified for an SAT fee waiver
- The student is an orphan or ward of the court under the age of 24

CSS Profile for noncustodial parents of domestic undergraduate students is free to submit for noncustodial parents whose family adjusted gross income is up to $100,000.

The CSS Profile is a form that was created by College Board and used by some colleges to determine how much to offer you in institutional aid, which is financial aid from the college. It can be filled out on a computer or on your phone. Two key things to know about the CSS Profile is that it is much more in depth than the FAFSA and that it does cost money to submit. There are fee waivers available if you meet certain requirements, which the application will flag to you if you are eligible. If you received an SAT fee waiver, if family income is approximately 100k or less or if you are an orphan or ward of the court under the age of 24 you are eligible for a fee waiver. There is no limit on how many colleges you can receive a fee waiver for.

Why is the CSS Profile Important?

- Colleges get a fuller picture of your financial situation to provide more aid

- Required by many private colleges with high costs of attendance and significant amounts of institutional aid to distribute (some will even meet your full financial need)

- Determine how much institutional aid to award you

It's important to complete the CSS profile in a timely manner if your college requires it. Most colleges that require the CSS profile have a very high cost of attendance and the majority of financial aid offered is based on information from the CSS Profile. For these colleges, if you do not complete the CSS Profile, you will not receive any institutional aid and will only receive federal and state aid.

Who needs to complete the CSS Profile?

- Students whose college(s) require it should fill it out
  - Check if your colleges require it [here](#)
  - Current college students should check to see if their colleges require it every year

You should check to see if any colleges you are applying to require the CSS Profile. If you are currently in college and filled out the CSS Profile your first year, you may need to fill it out again. Check with your financial aid office to see whether it is required again to keep receiving institutional financial aid.

Getting Started with the CSS Profile

- Use [this checklist](#) to get organized

Use this uAspire checklist to help you gather information needed to complete the CSS Profile. You can also scan this QR code to check it out. Keep in mind that any information you already gathered for the FAFSA, you will also need for the CSS profile.

Next, let's watch a video on key steps to take when starting the CSS Profile. Just a note, this video refers to last year's application but we are talking about the 2025-26 CSS Profile application in today's walkthrough.

Presenter click forward, video will automatically play

click space around video to progress to next slide OR *in presenter mode, advance to next slide*

[DO NOT press space or arrow to advance OR click on the video itself - it will play again**]**

CSS Profile
Completion
Overview

Now let's take a look at the CSS Profile and walk through the different sections. While we won't cover every section, we will cover the ones that we find lead to the most questions from students and families.

Getting Started

- General student info

- If neither a US citizen or US eligible noncitizen you should select "other," country of citizenship, and visa type

What if I'm not sure?

Select "U.S. eligible noncitizen" if the student:
1. - is a U.S. permanent resident (I-551)
2. - is a conditional permanent resident (I-551C)
3. - holds an I-94 with a designation of "Refugee," "Asylum Granted," "Parolee," T-Visa holder, or "Cuban-Haitian Entrant," "Victim of human trafficking," or
4. - is a citizen of the Republic of Palau, the Republic of the Marshall Islands, or the Federated States of Micronesia.

5. Select "other" if the student is not a citizen or permanent resident of the U.S. or Canada and does not meet the above criteria, including having been granted Deferred Action for Childhood Arrivals (DACA) status or having an F1, F2, J1, J2, or G series visa.

6. If the student has dual citizenship, select U.S. citizen.
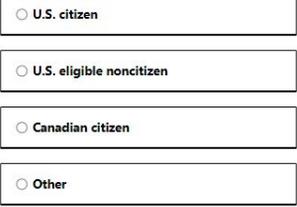
○ U.S. citizen

○ U.S. eligible noncitizen

○ Canadian citizen

○ Other

In the "Getting Started" section you will need to provide some general student info such as name, email address, date of birth, student marital status, and state of residence. **[CLICK ONCE]** If you are not a U.S. citizen, Canadian citizen, or eligible noncitizen you will need to select that your citizenship status is "Other", your country of citizenship and the type of visa that you have if that is applicable.

Student Dependency Questions

- Select "Yes" to any of the status questions that pertain to you

- Parent info may still be required, even if selecting "Yes"

- Status on FAFSA ⇏ Status on CSS

- If you cannot provide parent info you should follow up with each college's financial aid office directly

The next section will ask you a series of questions about your dependency status. This will help determine whose information will be required on the form and give colleges further insight when determining your financial aid. Many students will answer "No" to all the questions in this section and even if you say "Yes," parental information may still be required. If you cannot provide any parental info, we recommend that you follow up with the college to determine what information they would like you to provide.

Additional Student Information

- Social security number (if applicable) helps college match to other student info

- CBFinAidID: unique number assigned when creating CSS Profile account

Student's Permanent Address

What is Megan's address?

Street address (required)

Street address (line 2)

City (required)

Country (required)

ZIP/Postal Code

Student's Identification

Megan's Social Security Number (US) or Social Insurance Number (Canada)

[show]

Note: If you have a SSN or SIN, enter it. All information entered on the CSS Profile is securely collected and stored and only shared with the institutions you select. Schools often rely on your SSN or SIN to accurately identify your application

Save and Continue

CBFinAidID

Megan's CBFinAidID is used to match your application data. If you have one from last year or received one via email, enter it here. You may leave this blank if you do not have your CBFinAidID.

CBFinAidID

Save and Continue

☑ This information is accurate and complete.(required)

These next few pages ask additional student information. If you have a social security number, we recommend including it to make it easier for the colleges to match the CSS Profile info to the other info you've submitted to the college. If you have your CBFinAidID, you should enter it here. This is a unique number you are assigned when creating a CSS Profile account. It is used to ensure your identity and keep your information secure. Then you will be asked to confirm the information you've entered so far.

Parent Information

- All parents should be listed, including biological, adoptive, step parent(s), legal guardian(s), and parental partner(s), even if you do not live with them

- Check off the parent(s) who provide more financial support to determine whose info should be included

  - **This should match the parent you submitted on the FAFSA**

The next section is the parental information section. This section will show up once the form determines that parental info is required. You should add all parents here whether you live with them or not. Parents includes biological, adoptive, step parents, and parental partners that are married or in a domestic partnership. In addition, if you have a legal guardian, the form will ask you to list them as well. **[CLICK ONCE]** Depending on the parents listed and their marital status, the next page may ask you who provided the most financial support to determine whose information to include on the application. The parent(s) you select should match the information you submitted on the FAFSA, if you completed it.

Current Schooling

- Current grade level and current school you attend

What is Jacey's grade level for the 2024-25 academic year (required)

❶ How should I answer this? ▼

First year undergraduate ▼

Current College Information

❶ **Hint:** Use the College Search bar to find the name of Jacey's college or university for 2024-25 academic year.

State (required)

▼

School Name

What is Jacey's grade level for the 2024-25 academic year (required)

❶ How should I answer this? ▼

12th grade ▼

Current High School Information

❶ **Hint:** Use the High School Search box to find the name of Jacey's high school for the 2024-25 academic year.

State (required)

Idaho ▼

School Name

Private High School Information

If Jacey attended a private high school in 2024-25, provide the following information. If the student did not attend a private high school, click "Save and Continue" to go to the next question.

Amount Jacey received in scholarships and grants for 2024-25.

❶ What should I include? ▼

Amount Jace and Sandy paid toward Jacey's education for 2024-25.

❶ What should I include? ▼

Save and Continue

The next section will ask questions about the school you currently attend and your grade level at that school. **[CLICK ONCE]** If you are currently enrolled in college, you will list your current college.

[CLICK ONCE] If you are currently enrolled in high school, you will need to list your high school and answer a question about whether you are currently attending a private school. If you are attending a private school, you will need to list the financial aid you received to attend and how much your education costs in the current school year.

Adding Colleges

- Add colleges from your list that require CSS

- Include housing plans and regular, early action, or early decision application

- If you are a returning college student, you should include your college ID

Add or Remove College/Program

Search to select the colleges and programs that you want to receive your CSS Profile information. You can add or remove colleges or programs at any time before you submit your application.

Search By

◉ CSS Code Number

○ College/Program Name

○ State

Jacey, provide the following information for each college or program to which you are applying.

Boston College

2025-26 year in school (required)

▼

Boston College Assigned ID (if known)

🛈 Tell me more ▼

What are your housing plans? (required)

○ On campus

○ Off campus

○ With parents

○ With relatives

Next, you will need to list the colleges that require the CSS Profile. You can search colleges by CSS Code, name, or state. Once you list the colleges, you will need to select your housing status and whether you are applying early action, early decision, or regular decision if this is your first year. If you are unsure where you plan to live we recommend listing on campus so you can see if financial aid will help cover those costs. For returning students, we recommend listing your school ID to help colleges match your info up on the back end.

General Parent Questions

- General parent info
  - DOB
  - SSN
    - Leave blank if they do not have one
  - Email
  - State of residence
  - Education level

Provide the following for Alex

Tell us more about Alex

Date of birth (MM/DD/YYYY) (required)

Month   Day   Year

Social Security Number (or Social Insurance Number)

ⓘ How will this be used? ▼

show

Email address (required)

ⓘ How will this be used? ▼

State of residence (required)

▼

Highest level of education completed

▼

Save and Continue

Next, you will need to provide some general information about each parent listed including their date of birth, social security number, email, state of residence, and educational background. If your parent does not have a social security number, you should leave this field blank. If your parent(s) do not have an email address you can provide your own, but make sure to share any necessary information with them.

Parent 2023 Tax Filing Questions

- Parent(s)' tax filing status for prior-prior year (2023)
- Typically requires 1040 tax form and schedules, and W2s

Did Alex and Sandy file a federal tax return for 2023? (required)

ⓘ What if my parents filed a non U.S. return? ▼

◉ Completed

○ Estimated, will file

○ Not filed, and not required to file, a tax return

What type of tax return did Alex and Sandy file or will file for 2023? (required)

ⓘ Specific scenarios ▼

○ U.S. tax return (1040)

○ Canadian tax return

○ U.S. Territory return

○ Other non-U.S. tax return

What is Alex and Sandy's tax filing status for 2023? (required)

ⓘ What if my parents filed separate tax returns? ▼

○ Married, filing joint return

○ Head of household

○ Single

○ Married, filing separate returns

○ Qualifying surviving spouse

The next few questions establish your parents' tax filing status and determine which documents your parent(s) need to provide to answer the rest of the parent income questions. This includes their 2023 1040 tax form and schedules, and W2s from employers.

Parent 2023 Income and Taxes

Taxes Filed?

- 2023 tax info required

- Tax return info is listed exactly as it shows up on taxes

- Each question refers to exact line from taxes

No Taxes?

- 2023 earnings required

- If no 2023 earned income, put 0's

What amount is listed on Line 11: Adjusted gross income from Alex and Sandy's 1040? (required)

Did Alex and Sandy file a 1040 Schedule 1 - Additional Income and Adjustments to Income?

ⓘ What is Schedule 1 & what should I enter here?

| Yes ✓ | No ✗ |

Parent 1040 Tax Return, Line 4

Line 4a: IRA distributions

Amount of rollover, if any

Line 4b: IRA, taxable amount

Parent 1040 Tax Return, Line 5

Line 5a: Pensions and annuities

Amount of rollover, if any

Line 5b: Pensions and annuities, taxable amount

Parent 1040 Tax Return, Line 22

Line 22: Federal taxes paid (required)

ⓘ **Hint:** Only report the amount on Line 22. Do not include self-employment tax; an allowance for self-employment tax is built into the formula.

How much did Alex earn from work in 2023? (required)

ⓘ What should I include?

Each question about your parents' 2023 taxes asks for a specific line from the 1040 - you can see a few examples here. You should read each line and then check the tax form to see if there is a number on the corresponding line. If so, list that number. Some will also ask about a schedule 2 or 3. If you parents did not file a schedule, you do not have to answer schedule questions.

Even if no taxes were filed for 2023 the form will still ask you to list any earnings. If there were any earnings you would usually pull this number from box 1 of a W-2.

2023 Income and Benefits

- Most = 0 for many families
- Most common questions with answers:
  - Tax deferred pension contributions
  - Social Security Benefits

Parent Income and Benefits

Social Security benefits received in 2023 for all family members, except any who will be enrolled in college in 2025-26, that were not reported on a tax return.

Parent Income and Benefits

Alimony Received in 2023 (including, but not limited to, amounts reported on a tax return) (required)

Housing, food, and other living allowances received in 2023 as members of the clergy or other profession (required)

ⓘ What should & shouldn't I include? ▼

After providing your parents' 2023 tax information, the CSS Profile will go into a bit more detail about parent income from work any other untaxed income. The income earned from work can usually be found on the W-2 or if there is business income on the Schedule 1. For many families the majority of the answers to these questions are 0, but the most common ones we see answered with dollar amounts are the question about tax deferred pension contributions and untaxed social security benefits. If you have any questions about what should or shouldn't be included, you can click the yellow boxes for more detailed information.

2024 & 2025 Income and Benefits

- Most families have similar income to previous years and can repeat numbers
    - If NOT expected to change, don't need to provide estimates for 2025
- If it is/will be different, provide best estimate
- For help, watch this video

Enter the amounts Alex received or expect to receive in 2024 for the following:

Alex's income from work (required)

ⓘ **Hint:** Include wages, salaries, tips, and commissions.

Other taxable income (required)

ⓘ **Hint:** Enter the total amount of other taxable income, including interest and dividend income the student's parents expect to report on their 2024 income tax return.

Untaxed income and benefits (required)

ⓘ What should & shouldn't I include? ▾

0

Expect Change

Does Alex expect a significant income change in 2025 due to a new job, a job loss, retirement, benefit changes, etc.? (required)

Yes ✓   No ✗

This next section can be the trickiest part of the CSS Profile. They ask about current and future income and benefits for 2024 and 2025. This can be difficult to answer. For most families, unless there has been a change in employment, their income tends to be very similar to the previous year. If this sounds like your family, we recommend using the same numbers from 2023. If your parents have had changes in income the best way to get a good estimate is to take a look at the paystubs. **[CLICK ONCE]** If you think 2025 income will also be the same – you should say "No" to the question about 2025 expected changes. Doing so will allow you to skip the additional questions about 2025.

We also linked a video with recommendations on how to complete this section of the CSS Profile, as this can be confusing.

Additional Forms of Income

Other Taxable Income

- Listed on the tax form
  - Interest, dividends, real estate income, unemployment benefits, etc.

Untaxed Income

- Majority not listed on the tax form
  - Untaxed retirement contributions, child support, untaxed social security benefits, etc.

Parent Income and Benefits

Other untaxed income in 2023 (including, but not limited to Workers' Compensation, untaxed disability benefits, and income from other family members). (required)

ⓘ What should & shouldn't I include? ▼

ⓘ What should & shouldn't I include? ▲

Include:

- Workers' Compensation

- Untaxed Disability

- Money provided or expenses paid by other household members, relatives, or friends

- Untaxed military service benefits not reported elsewhere on this application

- Untaxed portions of Railroad Retirement benefits

- All other untaxed income and benefits

Do not include:

- Income reported elsewhere on this application, such as child support received

- Money from student financial aid

- Educational Workforce Investment Act benefits

- Veterans educational benefits

- Combat pay

Questions about other taxable income and untaxed income can be a bit confusing. Let's break each of those down.
- For questions about "Other Taxable Income" in either year you would include amounts from interest, dividends, unemployment income– basically other income that is included on the tax form but isn't earned by working.
- For questions about Untaxed Income and Benefits – this can be items like retirement contributions, untaxed social security benefits, health saving accounts – basically income and benefits that don't show up on the taxes.

For more information about what to include, you can review what is listed in the yellow info box.

Parent Benefits Received

- Check off any received in 2023 or 2024
  - Do not need to report the specific amounts

Parent Benefits

Check any of these below that Alex and Sandy received in 2023 or 2024.

ⓘ Tell me more ▼

☐ Supplemental Nutrition Assistance Program (SNAP), Food Stamps, or use EBT

ⓘ Tell me more ▼

☐ Women, Infants, and Children (WIC) or Special Supplemental Nutrition Program

ⓘ Tell me more ▼

☐ Temporary Assistance for Needy Families (TANF)

☐ Supplemental Security Income (SSI)

☐ Medicaid

Next you will need to check off if you've received any of the following benefits, including SNAP, WIC, or Medicaid. You do not need to report the specific amounts.

Parent Employment & Retirement Plans

- Choose employment and armed forces status
- List parent retirement plans and amounts

Betty - Retirement Plans

Which retirement plans does Betty participate in?

- ☐ IRA, Keogh, 401k, 403b, or other tax-deferred plan
- ☐ Plans to draw social security upon retirement
- ☐ Employer sponsored plan
- ☐ Civil service or state sponsored plan
- ☐ Union sponsored plan
- ☐ Military sponsored plan
- ☐ Other type of plan

Betty - Employment

What is Betty's occupation?

> ❶ **Hint:** Describe their primary occupation. If they're unemployed or retired, list their occupation when they used to work.

Where does Betty work?

How many years has Betty worked there?

Betty - Employment

What is Betty's employment status?

- ☐ Employed by others
- ☐ Self-employed
- ☐ Unemployed
- ☐ Retired or not employed by choice

Betty - Employment

Has Betty ever served in the U.S. Armed Forces? (required)

> ❶ What if they are currently serving or have been discharged?

| Yes ✓ | No ✗ |

The next section will ask about each parent's employment status, whether they have been in the US Armed forces, or if they are a dislocated worker. Depending on your answers to each, other questions may pop up. You will also need to list any retirement plans your parent has contributed to and what the current value is.

Additional Parent Information

- Any parents who do not live in the student's primary home or provide less financial support to the student.

- Additional parent will get an email inviting them to complete their own CSS Profile if colleges require it

Additional Parent Information

Answer the following questions about Jacey's parent who provided less than half of their financial support. This is the parent or parents whose financial information is not going to be included on this application.

Note: Enter "unknown" if this information is not known

Parent's first name (required)

Note: Enter "unknown" if this information is not known

Parent's last name (required)

Address (required)

City/state/ZIP code (required)

When was the separation and/or divorce?

Year of separation (required)

ⓘ What should I report? ▼

Year of divorce

ⓘ Hint: Leave year of divorce blank if the student's parents were never divorced.

Additional Parent Information

What amount will Sandy contribute towards the student's educational costs for the 2025-26 academic year? (required)

ⓘ What counts as a contribution? ▼

Is there a written agreement specifying this contribution? (required)

| Yes ✓ | No ✗ |

Additional Parent Information

At least one of your colleges or programs has requested that Megan's parent, Billy, complete a CSS Profile application. Enter Billy's email address, so that College Board can notify Billy.

Email address

Note: This parent will only have access to their own application. They will not see your current application.

For parents who are separated or divorced only one of them will have their information listed on the students CSS Profile. The form will ask for general information about the parent not listed. This parent may need to also fill out their own CSS Profile. Many colleges that require the CSS Profile consider income from both biological or adoptive parents even if they are separated or divorced.

[CLICK ONCE] Some additional questions will pop up about this parent, like the year of separation and divorce, the parent's occupation, and **[CLICK ONCE]** how much they are expected to contribute towards your education. **[CLICK ONCE]** Finally, if a college you are submitting your CSS Profile to requires this parent to submit their own application, you can add their email..

Housing Details

- Certify where you and your parent(s) live, type of housing, address
  - Depending on type of home(s), other questions will pop up

Megan's and parents permanent address are the same

Yes ✓	No ✗

Which best describes your family's housing situation? (required)

ⓘ What does "Live with Others" mean? ▾

○ Own home

○ Rent home

○ Live with others

○ Housing provided by employer

The form will ask you if you and your parents live together, what your address is, and what describes your living situation the best. Answering these questions will cause follow-up questions to pop up, like how much you pay in rent, or additional information about years and price if you own your home.

Household & Dependents

- Includes others who live in parent(s)' home and receive more than half their support from them
- School/college info will be required if applicable
  - If in college or private K-12, college cost and financial aid required

Dependent Summary

Provide information for everyone, other than Megan and their parents, who lives in the student's parents' household and receives more than half of their support from them.

Click the Save and Continue button if you have no dependent information to provide.

👤 **Dependent 1**

[Tell us more] [Remove]

This item is incomplete. Please complete this item.

The CSS Profile then asks for information about household members. This includes both you and your parent(s) and anyone who lives in the parents' household and receives more than half of their support from your parent or parents. For many students, this consists of siblings. If the additional household members are in college or a private K-12 school, more detailed information will need to be provided such as the school they are attending, the cost, how much financial aid they are receiving, and how much your family is contributing to their costs. This information is best found by talking to your parents and the sibling or siblings attending college and having them look in their college portal for a bill or financial aid offer.

There is another relatively brief section after this that you may need to fill out about child support. This includes any child support paid or received in 2023 and 2024, along with any child support expected in 2025.

Parent Expenses

- To get a more complete picture of parent(s)' expenses, it asks about:
  - Medical or dental expenses
  - Loan debt repayment
  - Alimony

Did Alex have any medical or dental expenses not covered by insurance?

ℹ **Hint:** Select "yes" if the student's parents had uncovered/unreimbursed medical/dental expenses that were more than 3% of their total income for either 2023 or 2024.

| Yes ✓ | No ✗ |

Repayment of any college loan debt in 2023

ℹ **Hint:** This includes loans for the student, parents, and siblings

| Yes ✓ | No ✗ |

Repayment of any college loan debt in 2024

| Yes ✓ | No ✗ |

Alimony

| Yes ✓ | No ✗ |

In order to better understand your parents' expenses in 2023, 2024, and 2025, the CSS Profile will ask about medical expenses, student loan debt repayment, and alimony. If your family has any of these expenses, check yes and report the amount.

Parent Assets

Includes

- Cash, savings, checking
- Investments (stocks, bonds, mutual funds, 529, etc.)
- Real estate
- Assets held in the name of other children
- Additional real estate/rented portions of your home
- Farms
- Businesses

Parent Asset Details

Current amount in cash, savings, checking, and deposit accounts (required)

For help with this section, check out this video!

Do Megan's parents have the following assets?

Investments (required)

ⓘ What investments are included? ▼

| Yes ✓ | No ✗ |

Own real estate beyond the primary home, such as land, a vacation or second home, a seasonal or vacation rental property, or rent real estate to others (required)

| Yes ✓ | No ✗ |

Own or operate a business that is a primary income source or is in addition to other work (required)

| Yes ✓ | No ✗ |

Own a farm or part of a farm (required)

| Yes ✓ | No ✗ |

The next section asks about parent assets. **[CLICK ONCE]** This includes cash, savings, checking, and deposit account amounts. **[CLICK ONCE]** It will also ask whether your parents have any investments, which can include stocks, bonds, mutual funds, 529 plans, and more. It will also ask about assets that are held in the names of other children. This would mean if your parents have an account in one of your siblings name but the assets are your parents'. This is not very common and would not include a siblings savings account if the money is your siblings'. When you navigate past the first few yes/no questions you will be asked for the actual dollars amounts for any assets that your parents do have.

Real estate may also be considered an asset. If a home is owned beyond the home you live in, that additional information will need to be provided. If your family rents out a portion of the home you live in, you will need to list the percentage of the home that is rented out.

 [CLICK ONCE] We have also linked a video with recommendations on how to complete this section of the CSS Profile.

Student Income

- Income section mirrors parents
  - Taxes filed – list info line by line
  - No taxes filed – list earnings
- Expected income & benefits
  - Only list income that you are sure about
  - Do NOT include work-study
  - It is okay to put all 0's for this section

Student Tax Return Status

Did Jacey file a tax return for 2023?

Tax Return Status (required)

○ **Completed**

○ **Estimated, will file**

○ **Not filed, and not required to file, a tax return**

Student U.S. Tax Return

Now let's get some information f[...]
2023 1040 tax return

Line 11: Adjusted gross income (required)

Line 22: Federal taxes paid (required)

Student Non-filer

How much did Jacey earn in 2023?

Income earned from work (required)

The student financial section closely mirrors the parent section but there are some slight differences. In the income section, if you file taxes you will need to copy over info from the taxes. If no taxes are filed you will need to provide how much income you earned, if applicable. You will also be asked about your expected income and benefits, which means what you expect to earn in summer 2025 and during the 2025-2026 school year. Obviously, this can be difficult to estimate so far into the future. Only list income you are 100% sure you will have. If there is any doubt do NOT list it. Additionally, you should NOT include work-study. Many students end up putting 0 for all of these questions because they are unsure if they will have any income.

Student Assets

- Asks about
  - Cash, savings, checking
  - Investments
  - Retirement Assets
  - Trusts
- Most students do not have many of these types of assets
- Only list assets in your name

Student Assets

Megan, tell us what types of assets you own and their current value. Statements from a bank or financial institution may be useful for this section.

Remember:
- provide the value for each asset as of today, rather than average or original values
- provide only the assets that belong to Megan (and if married, their spouse)

Student Asset Types

Does Megan have any of the following assets? Select all that apply.

Investments

| Yes ✓ | No ✗ |

A trust

| Yes ✓ | No ✗ |

Student Asset Details

How much does Megan currently have in cash, savings, checking, and deposit accounts? (required)

ℹ **Hint:** Enter the total value as of today.

Student Retirement

Does Megan own any retirement assets?

| Yes ✓ | No ✗ |

For help with this section, check out this video!

Next you will need to list amounts as of today for any assets that you have. For most students this usually only consists of cash, savings, and checking accounts. You will be asked about investments, trusts, and retirement assets, but these are less common.

Student Special Circumstances

- Opportunity to explain any unique situations that may impact your ability to pay for college including:

    · Income, employment changes

    · Other expenses

    · Non-contact with parent

Special Circumstances

Select all circumstances that have ongoing financial impact for your family. (required)

Note: Check all that apply. You will have an opportunity to explain your selection(s) on the next page. If you do not have any circumstances to report, select None.

☐ Change in employment

☐ Exceptional medical or dental expenses

❶ What is eldercare or financial support? ▼

☐ Eldercare or financial support of other family members

☐ Non-recurring income or expenses

☐ Other

☐ None

Special Circumstances

Explain the additional circumstance(s) you selected, including annual amounts paid for or additional costs.

2000 character limit

Save and Continue

The special circumstances section is your chance to explain any circumstances that you don't think are adequately shown by anything listed previously in the form. We always lean towards over explaining and giving the colleges a chance to consider your circumstances. If you have experienced a change in income, are sending money to family that lives elsewhere, don't have contact with one of your parents, or have other major household expenses that have come up recently, we fully recommend listing them here. Anything that may impact your ability to pay for college should be listed.

Keep in mind that if you list something in the special circumstances section colleges can choose whether or not to consider it when determining your financial aid. We also recommend following up with your colleges outside of the CSS Profile for any special circumstances.

Supplemental Questions

- Some colleges require answers to additional questions

    · These are asked in the "Supplemental Questions" section

How much consumer and installment debt do your parents owe? This includes car loans, credit cards, appliance loans, etc. It does not include mortages or other debt already reported on this application.

Requested by:
Amherst College

Provide details for each of these loans.
Requested by:
Amherst College

Save and Continue

Some colleges require answers to specific additional questions which can be found in the supplemental questions section. Colleges use these to cover anything left off by the CSS Profile that they want information about.

Submitting the CSS Profile

Let's watch a short video on the steps you will need to take to submit the CSS Profile

Presenter click forward, video will automatically play
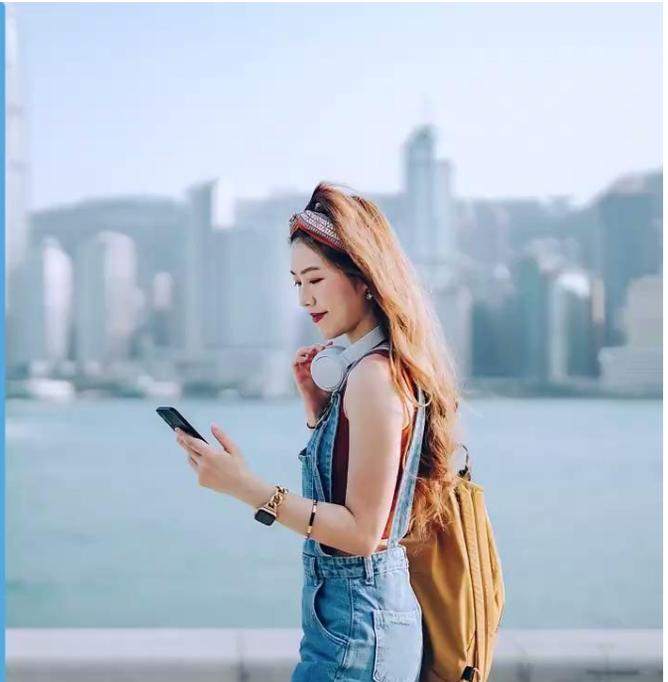
click space around video to progress to next slide OR *in presenter mode, advance to next slide*

DO NOT press space or arrow to advance OR click on the video itself - it will play again

Additional Steps After the CSS Profile

Depending on the colleges you are applying to, there may be some additional steps once you submit the CSS Profile.

CSS Dashboard

- The CSS Profile Dashboard is where you can do the following:
  - See the colleges that it's been sent to
  - Add colleges
  - Make one time corrections
  - Invite your other parent to complete their CSS Profile
  - See other next steps (if required)

Application Status
In Progress

Continue Application

Fee Waiver Eligible
You can send your CSS Profile to schools at no cost.

Colleges & Programs

Institution Name	CSS Code	Submission Date	Correction Date	Priority Filing Date	Priority Filing Date Information	Award Letter Date
Amherst College	3003			01/10/2024	Click for details	04/01/2024
Harvey Mudd College	4341			02/01/2024	Click for details	04/01/2024

Other Parent
At least one of your colleges or programs requires that both of your biological/adoptive parents, not just the one who completed this application, submit the CSS Profile application.

Please note: If you would like College Board to send your other parent an email to let them know, please provide their email address.

Enter parent's email address

When working on and submitting the CSS Profile, you will have access to the dashboard, which is where you can see the colleges you've listed so far and can access the form to continue working on it. After the CSS Profile has been submitted, the dashboard allows you to add colleges if you've decided to apply to additional colleges that require the CSS Profile. You can also see the status of your application, see any additional steps such as IDOC or inviting the other parent to complete the css profile, and make corrections if needed.

Additional ("Noncustodial") Parent

- Additional parent = The parent who provides less financial support (if parents are divorced/separated)

- Colleges may require info from the parent not listed on your CSS Profile

- If required, this parent will need to submit their own CSS Profile

- If this situation applies to you, it will note this on the CSS Dashboard

- Check out this handout and video for more info

○ CollegeBoard   **CSS Profile**

Creating a CSS Profile Account for Parent Use

To complete a CSS Profile application, you need a College Board **student** account. If you need to complete the CSS Profile as a parent (for example, as a noncustodial parent), you still need to create and use a **student** account. You just need to create a student account using the parent's information.

Account creation step-by-step:
1. Go to csssprofile.org
2. Click the **Sign In to** button for the appropriate application award year
3. Click **Create Account** under **Don't have an account?**
4. Create your account **using your (the parent's) information, not the student's information**.

Once you have created your account and are completing the CSS Profile application, be careful to answer student sections with the student's information and parent sections with the parent's information.

If you do not live with both biological or adoptive parents, but still have contact with the parent who provides less financial support, that other parent may need to submit their own CSS Profile, if your colleges require it. We have linked a video and handout as well for more information, and don't hesitate to reach out to your uAspire advisor if you have any questions.

Noncustodial Parent Special Circumstances

- If no contact, parent is not included

- Colleges may follow up for additional info about your relationship

- Colleges choose whether to waive this requirement
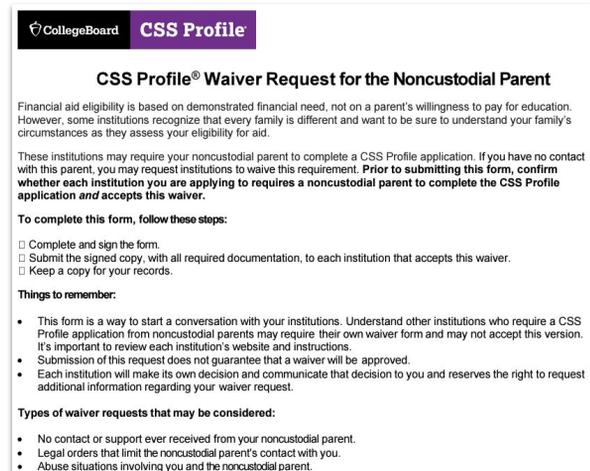
CSS Profile® Waiver Request for the Noncustodial Parent

Financial aid eligibility is based on demonstrated financial need, not on a parent's willingness to pay for education. However, some institutions recognize that every family is different and want to be sure to understand your family's circumstances as they assess your eligibility for aid.

These institutions may require your noncustodial parent to complete a CSS Profile application. If you have no contact with this parent, you may request institutions to waive this requirement. **Prior to submitting this form, confirm whether each institution you are applying to requires a noncustodial parent to complete the CSS Profile application *and* accepts this waiver.**

To complete this form, follow these steps:

☐ Complete and sign the form.
☐ Submit the signed copy, with all required documentation, to each institution that accepts this waiver.
☐ Keep a copy for your records.

Things to remember:

- This form is a way to start a conversation with your institutions. Understand other institutions who require a CSS Profile application from noncustodial parents may require their own waiver form and may not accept this version. It's important to review each institution's website and instructions.
- Submission of this request does not guarantee that a waiver will be approved.
- Each institution will make its own decision and communicate that decision to you and reserves the right to request additional information regarding your waiver request.

Types of waiver requests that may be considered:

- No contact or support ever received from your noncustodial parent.
- Legal orders that limit the noncustodial parent's contact with you.
- Abuse situations involving you and the noncustodial parent.

As mentioned earlier, if you do not have contact with your additional parent, you do NOT need to list them in the parent info section of the application. We also recommend that you don't include parents who are unknown, incarcerated, or where there is a documented case of abuse. This should make the entire process easier. If this is the case, colleges may follow up with you for an explanation of your past relationship with that additional parent. Keep in mind that each college may have their own process for the explanation, but it can consist of a letter or documentation explaining in detail why your additional parent will be unable to submit their CSS Profile. It is up to each college if they decide to waive this requirement.

IDOC

- IDOC (Institutional Documentation Service) is a Verification service

- Tax transcripts, tax returns, non-tax filer statements, etc.

- Uploading documents and filling out webforms ([uAspire IDOC Resource](#))

- Colleges will email and request you complete IDOC if it is required
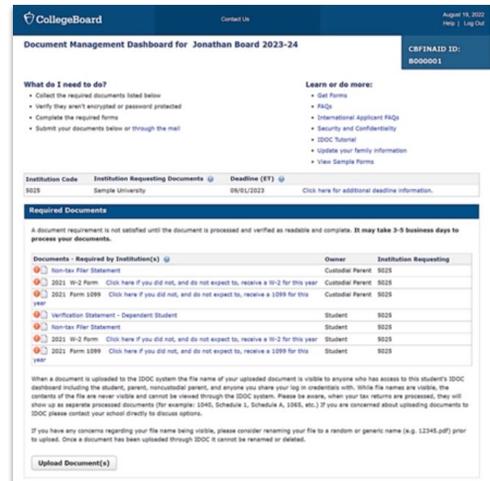
The IDOC process is another potential next step after the CSS Profile. It is a form of verification for colleges that require it. If you need to complete IDOC, the colleges you are applying to should let you know and it will be listed in your dashboard. This process will involve uploading or mailing copies of tax documents and filling out additional forms about your parent's household. We have our uAspire Verification Resource linked here for you to access, but verification can be a relatively complicated process so remember that your uAspire advisor is here to help.

Resource List

- [CSS Profile website](#)
- [CSS Profile Participating Institutions and Programs](#)
- [CSS Profile Checklist](#)
- [How to Start the CSS Profile video](#)
- [How to Answer Questions about Other Year Income video](#)
- [How to Answer Asset Questions video](#)
- [How to Submit the CSS Profile video](#)
- [Noncustodial Parent CSS Profile Handout](#)
- [Noncustodial Parent CSS Profile video](#)
- [Verification handout](#)

To begin to close us out, here is a list of resources mentioned today that you can use once you receive a PDF of the walkthrough in the follow up email.

Next Steps

- [ ] Gather materials required for CSS Profile using uAspire's checklist

- [ ] Complete the CSS Profile and Noncustodial application

- [ ] Complete verification if required

- [ ] Complete other financial aid steps

So let's talk next steps.

If you are required to complete the CSS Profile, the first step is to gather the materials required for the CSS Profile using uAspire's checklist and complete your application. If required, make sure your other parent completes their CSS Profile. If selected for verification, be sure to complete it ASAP.

Finally, there are more steps in the financial aid process that you will need to complete, and we are here to help along the way.

How to get follow-up support after today's presentation

u·aspire

So, let's talk about some of the ways you can get help with your specific situation and get further individualized support.

Additional Financial Aid Virtual Events

uAspire has ongoing financial aid events throughout the year on topics such as:

- Affording College 101
- FAFSA
- Next Steps Post-FAFSA
- Financial Aid Offer Review
- Scholarships Basics and Tips
- Summer Financial Aid Steps

Scan the QR code for upcoming events and registration links, or email studentsupport@uaspire.org for more information

We have ongoing financial aid and college affordability events throughout the year. You can find more information on these events and how to register on our website, uAspire.org, or send us an email at studentsupport@uaspire.org

Reach out to uAspire

Reach out to **studentsupport@uaspire.org**!

We can offer:
- Answers to questions
- Resources
- Personalized advice

If you have any additional questions that come up after today, I encourage you to reach out to studentsupport@uaspire.org. We can respond with an answer to your question, offer some great resources to guide you, or provide personalized advice for your unique circumstances.

Please complete this brief survey

u·aspire

We will now be launching a poll to get your feedback about this session. Your answers will help us continue to improve our walkthroughs in the future. We appreciate your participation!!!

Questions?

u·aspire

I have seen the Q&A feature being used so far during this presentation which is wonderful! Now we have time to address any questions that were not able to be answered yet and then we will open the floor for additional questions. Please chat them in, use the Q&A feature, or if you would rather ask out loud, raise your hand and we will unmute you.

Thank you so much for coming to this presentation. We look forward to supporting you as you move through the financial aid process.

Take care