

u•aspire

CSS Profile Walkthrough

Financial Aid Virtual Event

Date



Introductions



Name

Job Title

About me & fun fact

Name

Job Title

About me & fun fact

Agenda



- Before you start
- CSS Profile form completion
- Next steps
- How to get follow-up support
- Survey/Q&A



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.

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



APPLY WITH CSS PROFILE

CSS Profile

Each year CSS Profile unlocks access to more than \$10 billion in nonfederal aid to thousands of students.

[Sign in to Fall 2025/Spring 2026](#)

[Sign in to Fall 2024/Spring 2025](#)

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

collegeBoard **CSS Profile** September 24, 2021

2026-27 Participating Institutions and Programs

The following colleges, universities, and scholarship programs use [CSS Profile](#) and/or [IDOC](#) as part of their financial aid process for some or all of their financial aid applicants in the populations listed below. Please check schools' websites or contact the institution for more information.

CSS Code	Institution Name	Institution State	CSS Profile – Domestic Students	CSS Profile – International Students	CSS Profile – Noncustodial Parents	IDOC
1001	Adrian College, MI	MI	No	Yes	No	No
5007	American University	DC	Yes	No	Yes	No
0262	American University of Rome		Yes	Yes	Yes	No
3003	Amherst College	MA	Yes	Yes	Yes	Yes
4007	Arizona State University	AZ	Yes	No	No	No
0193	Armenian Student Assoc of Amer	MA	Yes	Yes	No	No
0613	Attleboro Scholarship Found	MA	Yes	No	No	No
3075	Babson College	MA	Yes	Yes	Yes	Yes

Getting Started with the CSS Profile

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



The screenshot shows the 'u·aspire' logo at the top, followed by the title 'CSS Profile Checklist'. Below the title is a paragraph explaining that the CSS Profile is required by some colleges and provides an in-depth knowledge of the student and family's financial situation. It includes a link to <https://cssprofile.collegeboard.org>. Below this is a form with two input fields for 'CollegeBoard username' and 'Password'. There are two checkboxes: one for '2023 Federal tax returns, schedules, and W-2(s)* for students and parent(s)' and another for 'Parent information'. The 'Parent information' section has two columns: 'Parent 1' and 'Parent 2 (if applicable)'. Each column has four rows for 'Full name:', 'Date of birth:', 'Job title:', and 'Place of employment:'.



Scan for checklist



CSS PROFILE

How to Start

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CSS Profile Completion Overview



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

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

Student Status

Indicate if any of these are true for Megan. These questions help us understand your situation better.

Note: Financial aid offices may require supporting documentation to make sure these are accurate.

Megan has legal dependents (required)

▾

Megan is a veteran of the U.S. Armed Forces or currently serving on active duty (required)

▾

Megan was determined to be an emancipated minor by a court in their state of legal residence (required)

▾

Megan is homeless, or at risk of becoming homeless. (required)

▾

Foster Care or Ward of the Court

Indicate if any of these are true for Megan. These questions help us understand your situation better.

Note: Financial aid offices may require supporting documentation to make sure these are accurate.

Megan was (until the age of 18) a ward of the court (required)

▾

Megan was (until the age of 18) in foster care (required)

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)

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 screenshot shows a digital form for entering parent information. On the left, there is a list of three parents: Betty Sample (Mother), Billy Sample (Father), and Bob Example (Stepfather). Each parent entry has a blue 'Tell us more' button and a grey 'Remove' button. At the bottom of this list is a grey 'Add Parent' button. On the right side, the 'Application Determination' section asks 'Who provided more than half of Emily's financial support?'. Below this question is a yellow callout box with a hint: 'Hint: Typically, the primary custodial parent provides the most support. If support is split evenly between households, select the parent with the higher income and assets. If the parent selected below is married or living with a partner, select that person as well.' Below the hint is a link to the FAQ. At the bottom of the right section, there are three radio button options: 'Sample Parent One', 'Sample Parent Two', and 'Sandra Parent'. A blue button is partially visible at the very bottom right.

Betty Sample (Mother)
Tell us more Remove

Billy Sample (Father)
Tell us more Remove

Bob Example (Stepfather)
Tell us more Remove

Add Parent

Application Determination
Who provided more than half of Emily's financial support?

Hint: Typically, the primary custodial parent provides the most support. If support is split evenly between households, select the parent with the higher income and assets. If the parent selected below is married or living with a partner, select that person as well.

See our [FAQ](#) on this topic for more information.

Sample Parent One

Sample Parent Two

Sandra Parent

Current Schooling

Current grade level and current school you attend

Current Academic Year

What is Emily's grade level for the 2025-26 academic year (required)

How should I answer this?

First year undergraduate

Current College Information

Enter the name of Emily's college or university for 2025-26 academic year.

College or university name (required)

Hint: Please enter the full name of your college or university.

Current Academic Year

What is Emily's grade level for the 2025-26 academic year (required)

How should I answer this?

12th grade

Current High School Information

Complete the fields below to describe Emily's high school for the 2025-26 academic year.

Select Emily's high school type (required)

Public School

High school name (required)

Hint: Please enter the full name of your high school.

City High School

Private High School Information

Provide the following information for Emily's private high school for the 2025-26 school year.

Amount Emily received in scholarships and grants for 2025-26. (required)

What should I include?

Amount Sample Parent and Sample Parent paid toward Emily's education for 2025-26. (required)

What should I include?

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

College/Program Name (required)

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

Boston College

2026-27 year in school (required)

Hint: Select Undergraduate options for Bachelor's or Associate's degrees. Select Graduate options for Master's degrees or higher.

Boston College Assigned ID (if known)

Tell me more

What are your housing plans? (required)

On campus

Off campus

With parents

With relatives

Save and Continue

General Parent Questions



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

Email address (required)

How will this be used? ▼

State of residence (required)

Highest level of education completed

Save and Continue

Provide the following for Alex

Tell us more about Alex

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

Month	Day	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Social Security Number (or Social Insurance Number)

How will this be used? ▼

show

Parent 2024 Tax Filing Questions

- Parent(s)' tax filing status for prior-prior year (2024)
- Typically requires 1040 tax form and schedules, and W2s

<p>Did Sample Parent and Sample Parent file a federal tax return for 2024? (required)</p> <p>What if my parents filed a non U.S. return?</p> <p><input checked="" type="radio"/> Completed</p> <p><input type="radio"/> Estimated, will file</p> <p><input type="radio"/> Not filed, and not required to file, a tax return</p>	<p>What type of tax return did Sample Parent and Sample Parent file or will file for 2024? (required)</p> <p>Specific scenarios</p> <p><input type="radio"/> U.S. tax return (1040)</p> <p><input type="radio"/> Canadian tax return</p> <p><input type="radio"/> U.S. Territory return</p> <p><input type="radio"/> Other non-U.S. tax return</p>	<p>What is Sample Parent and Sample Parent's tax filing status for 2024? (required)</p> <p>What if my parents filed separate tax returns?</p> <p><input type="radio"/> Married, filing joint return</p> <p><input type="radio"/> Head of household</p> <p><input type="radio"/> Single</p> <p><input type="radio"/> Married, filing separate returns</p> <p><input type="radio"/> Qualifying surviving spouse</p>
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Parent 2024 Income and Taxes

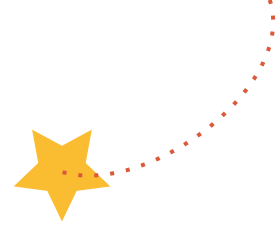
Taxes Filed?

- 2024 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?

- 2024 earnings required
- If no 2024 earned income, put 0's

2024 Income and Benefits



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

Social Security benefits received in 2024 for dependents not enrolled in college for 2026-27.

Hint: Report the amounts from 1099-SSA Box 5 for these dependents.

Parent Income and Benefits

Housing, food, and other living allowances received in 2024 as members of the clergy or other profession (required)

What should & shouldn't I include?

Parent Income and Benefits

Alimony Received in 2024 (including, but not limited to, amounts reported on a tax return) (required)

2025 & 2026 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 2026
- If it is/will be different, provide best estimate
- For help, watch [this video](#)

Parent 2025 Income and Benefits

Enter the amounts Sample Dad and Sample Mom received or expect to receive in 2025 for the following:

Sample Dad'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 2025 income tax return.

Untaxed income and benefits (required)

What should & shouldn't I include? ▼

Expect Change

Do Sample Dad and Sample Mom expect a significant income change in 2026 due to a new job, a job loss, retirement, benefit changes, etc.? (required)

Yes ✓

No ✗



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 2024 (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

Parent Benefits Received

- Check off any received in 2024 or 2025
 - Do not need to report the specific amounts

Parent Benefits

Check any of these below that Sample Dad and Sample Mom received in 2024 or 2025.

[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

[Tell me more](#)

Free or reduced price lunch

Parent Employment & Retirement Benefits

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

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)

i What if they are currently serving or have been discharged?

Yes ✓

No ✗

Betty - Employment

What is Betty's occupation?

i 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 - 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

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.

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

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

i What does "Live with Others" mean? ▼

Own home

Rent home

Live with others

Housing provided by employer

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.

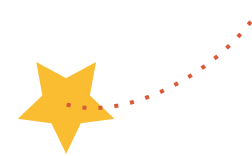
Dependent 1

[Tell us more](#)

[Remove](#)

This item is incomplete. Please complete this item.

Child Support



- Report the amount that each parent received and/or paid in child support in the year(s) specified.
- If you did pay or receive child support, you will be required to enter the specific amount.
- You will also be asked to specify how much of those funds went towards supporting the student.

Child Support Received

Did Sample Dad and Sample Mom receive child support in 2024? (required)

Yes ✓

No ✗

Save and Continue

Child Support Received

How much did Sample Dad and Sample Mom receive in child support in 2024?

Total amount received for all children (required)

Child Support Paid

Did Sample Dad and Sample Mom pay child support in 2024 or 2025? (required)

Yes ✓

No ✗

Parent Expenses

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

Did Sample Dad and Sample Mom have any medical or dental expenses not covered by insurance?

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 2024 or 2025.

Yes ✓

No ✗

Repayment of any college loan debt in 2024

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

Yes ✓

No ✗

Repayment of any college loan debt in 2025

Yes ✓

No ✗

Parent Assets & Investments

What assets must be reported

- Cash, savings, checking
- Real estate
- Assets held in the name of other children
- Additional real estate/rented portions of your home
- Farms
- Businesses

What investments must be reported

- College savings plans
- Stocks
- Money market funds
- Mutual funds
- Certificates of Deposit (CDs)
- Non-retirement annuities
- Stock options
- Bonds
- Trust funds



For help with this section, check out [this video!](#)

Parent Assets (Contd.)

- Report the value of any real estate owned beyond your own home
- If you own a business or work as an independent contractor (including Uber, Instacart, etc.) you will be asked to report those values or earnings.
- If you fully or partially own a farm, you will need to report those values as well.
- Report cash, savings, and checking account values as of the same day you're completing the CSS Profile.

Parent Asset Details

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

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 ✗

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 U.S. Tax Return

Now let's get some information from Emily's 2024 1040 tax return

Line 11: Adjusted gross income (required)

Line 22: Federal taxes paid (required)

Student Tax Return Status

Did Emily file a tax return for 2024?

Tax Return Status (required)

Completed

Estimated, will file

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

Student Non-filer

How much did Emily earn in 2024?

Income earned from work (required)

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 Details

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

Hint: Enter the total value as of today.

Student Asset Types

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

Investments

Yes ✓

No ✗

A trust

Yes ✓

No ✗

Student Retirement

Does Megan own any retirement assets?

Yes ✓

No ✗

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

? 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

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 mortgages 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

Yes or No?

Are these examples of supplemental questions real?



What is the make, model, year, and purchase price of the two primary vehicles owned by the family, and the student's primary vehicle?

YES - IT'S REAL!



What is the value of the student's cell phone, laptop, and internet bills?

NO - IT'S FAKE!



Enter the student's first and second career objective.

YES - IT'S REAL!



What is the average amount that your household spends on groceries per month?

NO - IT'S FAKE!



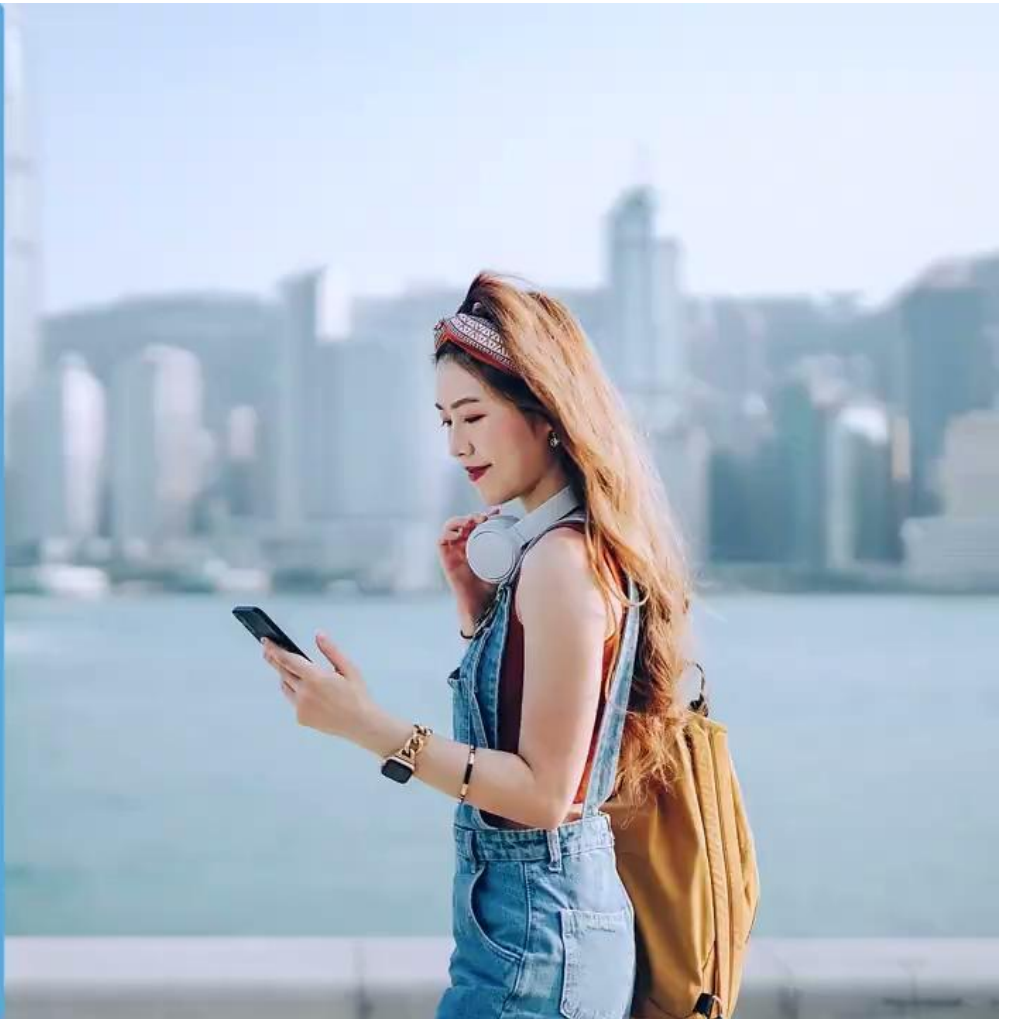
Submitting the CSS Profile



CSS PROFILE

How to Submit

u·aspire



Additional Steps After 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

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 cssprofile.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.

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

CollegeBoard

CSS Profile

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.

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 screenshot shows the IDOC Document Management Dashboard for Jonathan Board 2023-24. The page includes a header with the CollegeBoard logo, contact link, and date (August 19, 2022). A CBFINAID ID: B000001 is displayed in the top right. The main content area is divided into sections: 'What do I need to do?' with a list of tasks, 'Learn or do more:' with links to various resources, and a table of 'Required Documents' with columns for Institution Code, Institution Requesting Documents, and Deadline (ET). Below the table is a section for 'Required Documents' with a warning message and a list of documents with their owners and requesting institutions. At the bottom, there is a warning about file names and an 'Upload Document(s)' button.

CollegeBoard Contact Us August 19, 2022 Help | Log Out

Document Management Dashboard for Jonathan Board 2023-24 CBFINAID ID: B000001

What do I need to do?

- Collect the required documents listed below
- Verify they aren't encrypted or password protected
- Complete the required forms
- Submit your documents below or through the mail

Learn or do more:

- Get Forms
- FAQs
- International Applicant FAQs
- Security and Confidentiality
- IDOC Tutorial
- Update your family information
- View Sample Forms

Institution Code	Institution Requesting Documents	Deadline (ET)	
S025	Sample University	09/01/2023	Click here for additional deadline information.

Required Documents

A document requirement is not satisfied until the document is processed and verified as readable and complete. It may take 3-5 business days to process your documents.

Documents - Required by Institution(s)	Owner	Institution Requesting
Non-tax Filer Statement	Custodial Parent	S025
2021 W-2 Form Click here if you did not, and do not expect to, receive a W-2 for this year	Custodial Parent	S025
2021 Form 1099 Click here if you did not, and do not expect to, receive a 1099 for this year	Custodial Parent	S025
Verification Statement - Dependent Student	Student	S025
Non-tax Filer Statement	Student	S025
2021 W-2 Form Click here if you did not, and do not expect to, receive a W-2 for this year	Student	S025
2021 Form 1099 Click here if you did not, and do not expect to, receive a 1099 for this year	Student	S025

When a document is uploaded to the IDOC system the file name of your uploaded document is visible to anyone who has access to this student's IDOC dashboard including the student, parent, noncustodial parent, and anyone you share your log in credentials with. While file names are visible, the contents of the file are never visible and cannot be viewed through the IDOC system. Please be aware, when your tax returns are processed, they will show up as separate processed documents (for example: 1040, Schedule 1, Schedule A, 1065, etc.) If you are concerned about uploading documents to IDOC please contact your school directly to discuss options.

If you have any concerns regarding your file name being visible, please consider renaming your file to a random or generic name (e.g. 12345.pdf) prior to upload. Once a document has been uploaded through IDOC it cannot be renamed or deleted.

[Upload Document\(s\)](#)

True or False?



You must submit the CSS Profile to every college that you're applying to

FALSE: Only some colleges require students to submit a CSS profile (most commonly competitive private colleges). You can check to see if the colleges you're applying to require a CSS profile [here](#).



A student living in a legal guardianship would be considered independent on the CSS Profile.

FALSE: Unlike the FAFSA, students who live in a legal guardianship will need to provide personal and financial information for their legal guardians

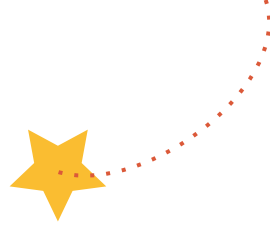


A 529 plan that benefits the student's sibling would need to be reported in the parent asset section if the parent owns the account.

TRUE: 529 Plans do need to be reported if the parent owns the account, even if the student is not listed as the beneficiary.




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](#)

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
- 

Don't hesitate to reach out to your financial aid office!

Contact the college's financial aid office if you are experiencing the following circumstances:

- You need to file a dependency override
- You have questions about the college's submission deadline
- You need clarification about a special circumstance (each college will have different criteria for special circumstances)

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



uAspire's Resource Page

Check out [uAspire's resource page](#), a hub of helpful resources like:

- Videos walking you through parts of the FAFSA
 - Also check out our [YouTube channel](#) for more videos and helpful resources
- Various checklists in many different languages
- Blog posts on financial aid topics

And more!

u-aspire

Home / Resources / Financial Aid Resources

FINANCIAL AID RESOURCES

Find ways to pay for college and manage costs to stay on your postsecondary path.

COLLEGE COST CALCULATOR **WEBINARS FOR COUNSELORS** **VIRTUAL EVENTS FOR STUDENTS**

Get Started

Follow the steps below to secure financial aid and make informed choices of where to go to college and how to pay for it. High school students can also download our senior year checklist.

FINANCIAL AID CHECKLIST

This checklist is available in Arabic, Cape Verdean, Haitian Creole, Portuguese, Chinese, Spanish, and Vietnamese.

Prepare

[Make a College List](#)

Create a college list that factors in affordability.

[Create an FSA ID](#)

The Federal Student Aid (FSA) ID is a username and password that you need to start the FAFSA. Use our guide to create your FSA ID.

The FSA ID How-to Guide is also available in Cape Verdean, Chinese, Haitian Creole, Portuguese, and Spanish.

ADDITIONAL RESOURCES >

Apply

[Submit the FAFSA](#)

Follow these steps to fill out the Free Application for Federal Student Aid (FAFSA) to apply for most types of financial aid.

The FAFSA checklist is also available in Arabic, Cape Verdean, Haitian Creole, Portuguese, Chinese, Spanish,

Additional Financial Aid Virtual Events

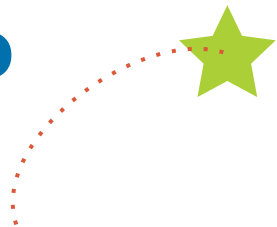
uAspire has ongoing financial aid events throughout the year on topics such as:

- Affording College 101
- FAFSA
- CSS Profile
- Next Steps Post-FAFSA
- Financial Aid Offer Review
- Summer Financial Aid Steps

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



Reach out to uAspire



For students and families looking for further financial aid support, send us a message at studentsupport@uaspire.org!

We can offer:

- Answers to questions
- Resources
- Personalized advice

For counselors and practitioners, check out our in-depth training resources here: uaspire.org/solutions/training



**Please complete this
brief survey**



Questions

?



Thank you!

u★aspire