Student Aid Form
2012 - 2013

PSAS
Private School Aid Service

DIOCESE OF PITTSBURGH

Please check the educational grant program or programs for which you are applying:

❑ **BISHOP'S EDUCATION FUND (BEF)**
This grant program is for Catholic students in grades K-12 attending eligible schools and registered in eligible parishes. **Pastor Signature and Parish Code Required** (see enclosed list). (SEE PAGE 4)

❑ **K-12 SCHOLASTIC OPPORTUNITY SCHOLARSHIP PROGRAM (SOS)**
This grant program is for any student in grades K-12 residing in Pennsylvania and attending any eligible Catholic school in the Diocese of Pittsburgh (see School Code List). **Proof of Residency Required** (SEE PAGE 8).

❑ **PRE-SCHOOL SCHOLASTIC OPPORTUNITY SCHOLARSHIP PROGRAM (SOS)**
This grant program is for any Pre-Kindergarten student residing in Pennsylvania and attending any eligible Catholic school in the Diocese of Pittsburgh (see School Code List). **Proof of Residency and Pre-K Supplemental Application Required** (see enclosed). (SEE PAGE 6 FOR PK SUPPLEMENTAL FORM)

❑ **Any other aid program that may be available through other scholarship organizations in cooperation with the Diocese of Pittsburgh.**

PLEASE NOTE: You may only apply to one school per student. If undecided, apply to the school your student will most likely attend. If a change is required after the application is received by PSAS, you MUST notify the Catholic Schools Office in writing.

This form must be postmarked no later than MARCH 15, 2012.

The Pre-School application deadline may be extended beyond this date. Please see your principal or program administrator.

STUDENT LAST NAME

PARENT LAST NAME

THIS APPLICATION CANNOT BE PROCESSED WITHOUT THE FOLLOWING ITEMS - PLEASE CHECK THIS LIST CAREFULLY

❑ 1. Detailed copies of all pages and Schedules of your **2011** Federal Income Tax Return Form 1040, 1040A or 1040EZ **(as filed with the IRS)** for individuals listed in Sections A and B. Recaps and/or Summary Forms are not acceptable. If you are not required to file a tax return, see the REQUIRED DOCUMENTATION section of the INSTRUCTIONS.

❑ 2. Copies of all **2011** W-2 Wage and Tax Statement Forms, all **2011** 1099/1099R for Interest/Dividends, Pensions/ Annuities and/or Misc. Income Forms for individuals listed in Sections A and B. **(Please make sure all documentation is copied on regular 8 1/2 x 11 paper)**

❑ 3. Proof of Residency: A copy of your **2011** Pennsylvania State Tax Return or Current Utility Bill (gas, water, or electric).

❑ 4. Documentation of TOTAL AMOUNTS received in **2011** for all Non-Taxable Income (see Section G for specific requirements).

❑ 5. Parent(s)/Guardian(s) Signature.

❑ 6. Pastor's Signature (if applying for BEF). (SEE PAGE 4)

❑ 7. EITC Supplemental Form Completed and Enclosed. (SEE PAGE 5)

❑ 8. Pre-School Supplemental Application Completed and Enclosed (if applying for a Pre-School student). (SEE PAGE 6)

❑ 9. Special Education Verification form (IF APPLICABLE).

❑ 10. Check or Money Order payable to PRIVATE SCHOOL AID SERVICE for the non-refundable application fee of $24.00. **(All returned checks will incur an additional fee of $25.00)**

IMPORTANT: If the above items do not accompany this application, your application will not be considered complete.

Keep a copy of this completed application and all documentation for your records.

To check the processing status of your application, go to www.psas.org.

Mail to: PRIVATE SCHOOL AID SERVICE , P.O. BOX 89434, CLEVELAND, OHIO 44101-6434

Save Form | Print Form | Clear Form

Student Aid Form • 2012 - 2013

● IMPORTANT: Print clearly and neatly with a blue or black ball point pen ●

A Parent, Guardian, or Other Adult Responsible for Tuition

Check One: ❍ Father ❍ Mother ❍ Step-Father ❍ Step-Mother ❍ Other Adult

Last Name | First Name | M.I.

Social Security Number | Age | ( ) (Area Code) Home Phone

Address | Apt. # | **COUNTY OF RESIDENCE**

City | State | Zip Code

( ) (Area Code) Work Phone | E-mail Address

Employed by | How Long? | May PSAS contact you at work if there are questions? ❍ Yes ❍ No

❍ If you are self-employed, please check and refer to Section K of this form. | Are you Catholic? ❍ Yes ❍ No

B Parent, Guardian, or Other Adult Residing with Parent A

Check One: ❍ Father ❍ Mother ❍ Step-Father ❍ Step-Mother ❍ Other Adult

Last Name | First Name | M.I.

Social Security Number | Age | ( ) (Area Code) Home Phone

Address | Apt. # | **COUNTY OF RESIDENCE**

City | State | Zip Code

( ) (Area Code) Work Phone | E-mail Address

Employed by | How Long? | May PSAS contact you at work if there are questions? ❍ Yes ❍ No

❍ If you are self-employed, please check and refer to Section K of this form. | Are you Catholic? ❍ Yes ❍ No

Has either parent been called to active duty? ❍ **Yes** ❍ **No** **Parish Code**** _____

C Dependents *(DO NOT LEAVE BLANK)*

Number of dependent children who will attend a tuition charging school: daycare, Pre-K, elementary school, secondary school, or college in the fall of 2012? _____

Please list all dependent children in order of oldest to youngest, including college students. Indicate each dependent's relation to Parent/Guardian A: child, foster child, grandchild, etc.

	Dependent Last Name	Dependent First Name	M.I.	Age	Relation to Parent/ Guardian A	Name of school student plans to attend in the Fall of **2012** **DO NOT ABBREVIATE** / City and State	Grade in the fall of **2012**	Applying for Aid? check one Yes	No	Tuition charged yearly per student?	School Code**	Office Use Only
1						School Name / City and State		❍	❍			
2						School Name / City and State		❍	❍			
3						School Name / City and State		❍	❍			
4						School Name / City and State		❍	❍			
5						School Name / City and State		❍	❍			

❍ **Please check if additional dependents are listed on a separate sheet.** ****Refer to School and Parish Code List***

***Pre-School Supplemental Application Form MUST be completed and returned with this application if you are applying for a Pre-School student. (SEE PAGE 6)**

D Household Information

1. Number of individuals who resided in my/our household during **2011:**

Parents/Guardians _____ Children _____ Other* _____

*If **Other**, please explain _____

2. **Current marital status/housing arrangement of Parent/Guardian A:**

❍ a. Single, never Married* ❍ d. Divorced* ❍ g. Other:

❍ b. Married ❍ e. Remarried*

❍ c. Widowed ❍ f. Separated*

*If **Single, Divorced, Remarried, or Separated,** please complete **Section E**.

E Single, Divorced, Remarried, or Separated Parents (To be completed by the Parent/Guardian listed in Section A)

1. Date of separation (Month/Year) _____
2. Date of divorce (Month/Year) _____
3. Non-custodial parent _____ Last Name | First Name | M.I.
4. Do you receive or pay child support? ❑ Receive $ _____ Per year ❑ Pay $ _____ Per year ❑ Neither
5. Who claimed student as a tax dependent in **2011**? _____
6. Who is responsible for the tuition for the dependent(s) listed in Section C?

❑ Father _____% Name _____

❑ Mother _____% Name _____

❑ Other _____% Name _____*

*If tuition is shared, each responsible party must complete a Student Aid Form (SAF).

F Taxable Income

The **2011** federal tax return for student's household was:

- ❍ Filed
- ❍ Not filed yet (See **Required Documentation** section)
- ❍ I/We do not file. I/We only receive non-taxable income

	Actual 2011	Estimate 2012
1. Total number of exemptions claimed on Federal Income Tax form.		
2. Parent/Guardian A total taxable income from W-2 wages. (Total income for Parent A only)	$ _____	$ _____
3. Parent/Guardian B total taxable income from W-2 wages. (Total income for Parent B only)	$ _____	$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedules C, E, and/or F from your IRS 1040) **See 2011 1040 lines 12, 17, and 18**	$ _____	$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. **See 2011 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21; See 2011 1040A lines 8a-14b**	$ _____	$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ. **See 2011 1040 line 36 or 1040A line 20**	$ _____	$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ. **See 2011 1040 line 37 or 1040A line 21**	$ _____	$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040EZ. **See 2011 1040 line 61 or 1040A line 35**	$ _____	$ _____
9a. Medical/Dental expenses as reported on Schedule A, line 1 of your IRS 1040 form.	$ _____	$ _____
9b. Charitable Contributions as reported on Schedule A, line 19 of your IRS 1040 form.	$ _____	$ _____

G Non-Taxable Income

List the **total amount** received from **1/1/11-12/31/11** for all recipients in the household. **DO NOT** list monthly amounts.

10. Child Support $ _____ per year
11. **Cash Assistance (TANF)** **$ _____ per year***
12. **Food Stamps and/or W.I.C.** **$ _____ per year***
    a. **Medicaid received in 2011?** ❍ Yes ❍ No
13. **Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.)** **$ _____ per year***
    a. **Social Security income (SSI Only) Total received in 2011** **$ _____*** **(Provide documentation for all recipients in household.)**
14. **Student loans and/or grants received for PARENT's education (Not college attending dependents or students listed in Section C.)**
    a. **Total received in 2011** **$ _____***
    b. **Total used for household expenses** **$ _____ per year***
15. **Housing Assistance (Sec. 8, HUD, etc.)** **$ _____ per year***
    a. **Religious Housing Assistance (parsonage, manse, etc.) Total received in 2011** **$ _____***
16. **Other non-taxable income (Working for cash, Adoption and/ or Foster Subsidy, Worker's Comp., Disability, Pension/ Retirement, etc. Identify source(s) in Section L)** **$ _____ per year***
    a. **Any and all Military/VA Benefits and/or Compensation Total received in 2011 (Identify source(s) in Section L)** **$ _____ per year***
17. Loans/Gifts from friends or relatives $ _____ per year
18. Personal Savings/Investment Accounts used for household expenses (Do not include totals listed in Section I) $ _____ per year
19. Total non-taxable income for **2011** $ _____ per year

***You must provide 2011 YEAR-END documentation for items 11-16a; either a YEAR-END Statement from the appropriate Public Agency, or documentation showing totals from 1/1/11-12/31/11.**

H Housing Information *(DO NOT LEAVE BLANK)*

20. Do you rent or own your residence? ❍ Rent ❍ Own (go to line 22)
21. If renting, what is the monthly rental payment? $ _____
    a. Amount paid by household $ _____ per month
    b. Amount paid by other source(s) $ _____ per month
    c. Are you current on your monthly payment? ❍ Yes ❍ No
    If No, what was the total amount paid in **2011**? $ _____
22. If you own a residence:
    a. What is the current market value? $ _____
    b. What is the amount still owed, including home equity loans? $ _____
    c. What is the monthly mortgage payment? $ _____ per month
    d. Are you current on your monthly payment? ❍ Yes ❍ No
    If No, what was the total amount paid in **2011**? $ _____

I Assets & Investments (Current Values)

23. Total amount in cash, checking, and savings accounts $ _____
24. Total value of money market funds, mutual funds, stocks, bonds, CDs, or other securities $ _____
25. Total value of IRA, Keogh, 401K, SEP, or other retirement accounts $ _____
    a. What was your total contribution to your retirement account(s) in **2011** (IRA, Keogh, 401K, SEP, etc.)? $ _____
26. If you own real estate other than your primary residence:
    a. What is the fair market value? $ _____
    b. What is the amount still owed? $ _____
27. Do you own a business? ❍ Yes ❍ No
    If **Yes**, please go to **Section K**.
    a. What is the fair market value of your business? $ _____
    b. What is the amount still owed? $ _____
28. Do you own a farm? ❍ Yes ❍ No
    If **Yes**, please go to **Section K**.
    a. What is the fair market value of your farm? $ _____
    b. What is the amount still owed? $ _____

J Unusual Circumstances (Check all that apply to your situation within the past 12 months)

- ❑ a. Loss of job
- ❑ b. Recent separation/divorce
- ❑ c. Change in family living status
- ❑ d. Change in work status
- ❑ e. Bankruptcy
- ❑ f. College expenses
- ❑ g. Income reduction
- ❑ h. Illness or injury
- ❑ i. Death in the family
- ❑ j. Shared custody
- ❑ k. High debt
- ❑ l. Child support reduction
- ❑ m. Medical/Dental expenses
- ❑ n. Shared tuition
- ❑ o. Other (explain in Section L)

Office Use Only

EITC _____ H _____ $ _____

Keep a copy of this completed application and all documentation for your records.

Go to next page ➡

Parent/Guardian A: _____ SS#: _____
Print Name

K Business Income Estimate (2011 Totals)

(If you have not filed your 2011 Tax Return, and are Self-Employed, own a business, rental property, and/or farm - DO NOT LEAVE BLANK)

	Schedule C	Schedule E	Schedule F
1. What is your total estimated **GROSS** business taxable income?	$ _____	$ _____	$ _____
2. What is your total NET business taxable income/loss? (DO NOT LEAVE BLANK)	**$** _____	**$** _____	**$** _____

3. If your business pays your home rent or mortgage, what is the annual total? $ _____

4. If your business pays for your personal automobile, what is the annual total? $ _____

5. If your business pays any portion of other personal expenses, list total amount and explain in Section L. $ _____

6. If you own rental property: What was the total amount of Rental Income received? $ _____

L Explanations (Use this space to explain any answers which may need clarification.)

M Certification, Authorization, and Documentation Requirements

WHAT IS REQUIRED TO PROCESS THIS APPLICATION

(IF ANY OF THE FOLLOWING IS MISSING, YOUR APPLICATION WILL NOT BE CONSIDERED COMPLETE.)

1. This application form filled out in its entirety, *SIGNED AND DATED BELOW* by the Parent(s)/Guardian(s) listed in Sections A and B.

2. A check or money order made payable to PRIVATE SCHOOL AID SERVICE in the amount of $24.00. *This is a non-refundable application fee.*

3.

If you have filed a 2011 IRS Form 1040:

A complete photocopy of your **2011** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

If you have not yet filed a 2011 IRS Form 1040:

A complete photocopy of your most recent Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules). **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS and a copy of your last filed tax return.***

If you do not file an IRS Form 1040 AND receive only non-taxable income:

Photocopies of your **2011** YEAR-END Social Services statement (TANF, etc.). Food Stamp documentation, Housing Assistance documentation, Student Loans and/or grant documentation for parent's education, Social Security income statements showing **TOTAL AMOUNTS** received in **2011** for ALL members of the household.

4. My/Our Pastor has signed the application form (if applying for the Bishop's Education Fund).

5. I/we have enclosed the Pre-School Supplemental Application Form (if applying for a Pre-School student).

6. I/we have enclosed the EITC Supplemental Form and a copy of my/our PA-40 Pennsylvania State Tax Return or a copy of a Utility Bill showing my/our Current Address.

7. I/we have enclosed the Special Education Verification Supplemental Form (if applicable).

8. If my son or daughter is eligible for a grant from another Educational Improvement Tax Credit (EITC) Scholarship organization, I authorize the release of my Family Financial Profile from Private School Aid Service to any other EITC scholarship organization.

I/We declare that the information on this form is true, correct, and complete to the best of my/our knowledge. I/We authorize PRIVATE SCHOOL AID SERVICE to return this form and all attachments only to the schools and agencies named in Section C under contract with PSAS.

SIGN HERE

_____ _____
Parent or Guardian (Section A) Name of Parish (For BEF) City

_____ _____ _____
Parent or Guardian (Section B) Signature of Pastor (For BEF) Parish Code (see list)

This Student Aid Form (SAF), all attachments and an analysis of your SAF are sent only to the school(s) or agencies contracting with PSAS.

You will not receive results from PSAS. No other agency will see or receive any information about this application or its attachments.

PSAS will not return any documents or provide copies of any documents. Please keep a copy of all paperwork for your records.

Mail completed application and photocopies of all documentation to:

PRIVATE SCHOOL AID SERVICE, P.O. BOX 89434, CLEVELAND, OH 44101-6434

Questions? Call: (440) 892-4272

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THIS FORM MUST BE RETURNED WITH THE APPLICATION

Educational Improvement Tax Credit (EITC) Supplemental Form

Household Members: (List every resident in the household)		**Household Income:** (List income from **2011** PA-40 filed by any resident)	
	Name	Filed PA-40 Yes or No	Taxable Income
Parent/Guardian A:		☐ ☐	$
Parent/Guardian B:		☐ ☐	$
Others:		☐ ☐	$
		☐ ☐	$
		☐ ☐	$
		☐ ☐	$
		☐ ☐	$
		☐ ☐	$
Total Household Members:		**Total Income:**	**$**

Signature: _____ Social Security Number:

Please use these guidelines to determine whether your family qualifies to apply.

EITC Income Guidelines:

Number of Dependents	Maximum Income
1	$72,000
2	$84,000
3	$96,000
4	$108,000
5	$120,000*

* add $12,000 for each additional dependent

The Educational Improvement Tax Credit Program is closely regulated by State legislation. Per State law, the following guidelines should be used to determine what should be included as "Income."

In calculating household income for the purpose of determining student eligibility, all moneys and property received by all household members of whatever nature and from whatever source are to be included, except for the following:

a. Periodic payments for sickness and disability other than regular wages received during a period of sickness or disability.
b. Disability, retirement or other payments arising under workers' compensation acts, occupational disease acts, and similar legislation by any government.
c. Payments commonly recognized as old age or retirement benefits paid to persons retired from service after reaching a specific age or after a stated period of employment.
d. Payments commonly known as public assistance or unemployment compensation benefits by a governmental agency.
e. Payments to reimburse actual expenses.
f. Payments made by employers or labor unions for programs covering hospitalization, sickness, disability or death, supplemental unemployment benefits, strike benefits, social security and retirement.
g. Compensation received by United States service personnel serving in a combat zone.

For information regarding income guidelines for families with special needs students or students attending special education schools, please contact your school administrator.

DIOCESE OF PITTSBURGH
PRE-SCHOOL SCHOLASTIC OPPORTUNITY SCHOLARSHIP FUND (SOS)
SUPPLEMENTAL APPLICATION

This Form Applies ONLY to those Families Applying for Pre-School SOS Scholarships
(Please Print Clearly)

After completing the Parent/Guardian section below, please have the school principal or program administrator complete the yearly tuition rate for each student and sign the form. Then, include this form with your completed Diocese of Pittsburgh Student Aid Form to Private School Aid Service (PSAS).

Parent/Guardian (from PSAS Application Section A):

_____
Last Name First Name Middle Initial

Pre-School Dependent(s) (from PSAS Application Section C):

Student Name	School Name	School Code (see list)	Annual Tuition* (principal completes)
1._____	North American Martyrs	6178	$_____
2._____	_____	_____	$_____

Signature of Parent/Guardian: _____ **Date**: _____

*By signing below, I, the Pre-School Principal/Program Director, verify that the above student(s) has/have applied to our Pre-School Program and the tuition rate(s) is/are correct.**

Signature of Principal/Program Director: _____ **Date**: _____

Print Name: _____ Phone Number: _____

*** Please do not include extended day or daycare fees in the tuition rates. SOS funds may not be used for these additional fees.**

This Form MUST be completed and submitted with the PSAS Student Aid Form if you are applying for a Pre-School Student.

INTRODUCTION

PRIVATE SCHOOL AID SERVICE (PSAS) is under contract with the school, school system, or organization from which you obtained this application for tuition assistance. Our purpose is to provide a reasonable assessment of the ability of each family to pay for the education of their children at private and independent elementary and secondary schools.

Your Student Aid Form, all attachments, and an analysis of your SAF are sent only to the school(s) or agencies contracting with PSAS. ***No other agency will receive any information about this application or its attachments.***

PRIVATE SCHOOL AID SERVICE does not make any decisions about recipients and amounts of financial aid awarded. Recipients and amounts of aid are determined by the designated school or agency. **YOU WILL NOT RECEIVE RESULTS FROM PRIVATE SCHOOL AID SERVICE.**

INSTRUCTIONS

A & B Parent, Guardian, or Other Adult

This form should be filled out by the parent, guardian or other adult responsible for the tuition of the child or children attending a private or independent school contracting with PSAS. If the parents/guardians are divorced or separated, only the parent responsible for the tuition and any other adult residing in the household should fill out the form. If tuition is shared, each responsible party must complete a Student Aid Form (SAF) if financial aid is needed.

Answer *all questions* for both parent(s), stepparent(s), or guardian(s) responsible for tuition for the dependent(s) listed in Section C. **Do not leave any questions blank.** If natural parents are divorced, separated or single, answer all questions in Section E. If natural parents are divorced/separated and remarried, list information for custodial parent and new spouse. If either parent answers "self-employed," and has not filed a tax return, complete Section K.

Detach Here

CALCULATIONS ARE BASED ON TOTAL HOUSEHOLD INCOME.

C Student Information

List all dependent children residing in your household in order of oldest to youngest. Indicate the relation to Parent/Guardian A listed in Section A of the application (i.e. child, grandchild, foster child, stepchild, etc.). If your dependents will be enrolled in any tuition charging school or agency next fall (including daycare, preschool, elementary school, high school, college, or trade school), list the name of the school, city and state where the school is located. List the grade your child(ren) will enter next fall (**2012-2013**); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

If "No" is checked for a student listed in Section C, that student will not be considered for tuition assistance. For all additional dependents, use a separate sheet.

NOTE: The information regarding tuition charged per student assists PSAS in making the most equitable analysis of your ability to pay for private education. If you are unsure, please estimate.

D Household Information

ITEM 1: Enter total number of individuals living in the household. Include any college students claimed on the tax return. Do not include children who have moved out of the home. Include all family members dependent on and residing with the parent listed in Section A.

ITEM 2: Check the appropriate box indicating custodial parents' marital status. If parents are single, divorced, remarried, or separated, complete Section E.

E Single, Divorced, Remarried, or Separated Parents

If dependent(s) parents are divorced or separated, or do not reside in the same household, the custodial parent must provide the information requested in Section E about the non-custodial parent.

If the date of separation took place in the year 2011, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2011. Be sure to estimate the income in Section F for 2012.

ITEM 4: List the total amount of child support actually received by custodial parents listed in Sections A & B. If total received differs from court ordered amount, list only the total received.

ITEM 6: Indicate who is responsible for tuition and what percentage for the dependents listed in Section C.

F Taxable Income

List all actual amounts for **2011** and estimated amounts for **2012**.

ITEM 1: Enter the total number of exemptions you claimed on your **2011** IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total **2011** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2011** W-2 forms and/or **2011** 1099 forms from all employers.

ITEM 3: Enter the total **2011** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2011** W-2 forms and/or **2011** 1099 forms from all employers.

ITEM 4: Enter the total net income from business (attach Schedule C or C-EZ), all rents, royalties, partnerships (attach Schedule E), and all farm income or loss (attach Schedule F). If you have received income from any of these sources and are estimating your income for **2011**, you must also fill out Section K of this application. *(See **2011** 1040 lines 12, 17, and 18, enter sum total.)*

ITEM 5: Enter the total of all other taxable income from interest, dividend income (attach Schedule B if over $400), taxable refunds, credits or offsets of state and local income taxes, alimony received, capital gain or loss (attach Schedule D). List all capital gain distributions not previously reported, total IRA distributions (if rolled-over, explain in Section L), pensions and annuities, unemployment compensation, taxable social security benefits, and any other taxable income. **Attach copies of all Form 1099/1099R, and/or Form 1098 for Interest/Dividends, Pensions/Annuities or other misc. income. Attach copies of Social Security Income statements and Unemployment Compensation documentation for year-end 2011.** *(See **2011** 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21, or 1040A lines 8a-14b, enter sum total.)*

ITEM 6: Enter allowable adjustments to income, such as IRA payments, self-employment tax, self-employed health insurance deduction, Keogh retirement plan and self-employed SEP deductions, penalty on early savings withdrawals, and alimony paid. Add together to arrive at your total adjustments. **DO NOT** include your standard deduction or deduction amounts for each family member. *(See **2011** 1040 line 36, or 1040A line 20.)*

ITEM 7: Enter total adjusted gross income as reported on your IRS Form 1040, 1040A or 1040EZ. Attach all pages of the applicable tax form (1040, 1040A, 1040EZ) for documentation. *(See **2011** 1040 line 37, or 1040A line 21.)*

ITEM 8: Enter the Total Tax paid (not withheld) as reported on your IRS Form 1040, 1040A, or 1040EZ. *(See **2011** 1040 line 61, or 1040A line 35.)*

ITEM 9a: Enter the total of any medical and dental expenses as reported on Schedule A, line 1 of your IRS Form 1040 (attach Schedule A).

ITEM 9b: Enter the total amount of Charitable Contributions as reported on Schedule A, line 19 of your IRS Form 1040 (attach Schedule A).

Keep a copy of this completed application and all documentation for your records

G Non-Taxable Income

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2011** for all recipients in the household for the following: Cash Assistance (TANF), Food Stamps, Social Security income, Student loans and/or grants (received for PARENT's education), Housing assistance (Section 8, HUD, etc.), Worker's Compensation, Disability or Retirement.

ITEM 10: Child support: Report total amount received for **2011** for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for **2011**.

ITEM 12: Food Stamps and/or W.I.C.: Report total amount received for **2011**. Do not combine with TANF or Medicaid.

ITEM 12a: Did you receive Medicaid in **2011**?

ITEM 13: Social Security benefits: Report the total non-taxable (**SSA/SSD, etc.**) amount received in **2011** for all recipients in household.

ITEM 13a: Social Security benefits: Report the total non-taxable (**SSI ONLY**) amount received in **2011** for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in **2011** for PARENT'S education. Do not list loans, grants or scholarships received for dependents in Section C. Identify how much of this income was used for household expenses in **2011**.

ITEM 15: Housing assistance: Report the total amount received for **2011**. Identify in Section L all sources of Housing assistance (government assistance, Section 8, HUD, family/friends or other sources), including monies received toward rental/mortgage payments and/or utilities.

ITEM 15a: Religious Housing assistance: Report the total amount received for **2011**.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in **2011** including: Working for cash, Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; cash support or any money paid on your behalf, including support from a non-custodial parent or any other person (do not include court ordered support here); adoption and/or foster care subsidy, or any other benefit or income not subject to taxation by any government (Refugee Assistance, etc.). Identify source(s) in Section L.

ITEM 16a: Any and all Military/VA Benefits and/or Compensation: Provide your Leave and Earnings Statement (if applicable) and report the total amount received for **2011** of food and other living allowances paid to members of the military, veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.), VA Educational Work-Study, etc. Identify source(s) in Section L.

ITEM 17: Loans/Gifts received from friends or relatives: Report the total amount received in **2011**.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in **2011** for household expenses.

ITEM 19: Total non-taxable income for 2011: Add together Items 10-18.

H Housing Information

ITEMS 20 and 21: If you rent your home or apartment, list your monthly rental or lease payment here, including amounts paid by household and other sources.

ITEM 21c: Indicate whether you are current on your monthly rental payment and if not, what the actual amount was that you paid in **2011**.

ITEM 22a: Determine the present value of the family home and list it. Local real estate agents should be able to help you if you are unsure.

ITEM 22b: Check with your lending institution and enter the amount still owed, including second mortgages.

ITEM 22d: Indicate whether you are current on your monthly mortgage payment and if not, what the actual amount was that you paid in **2011**.

I Assets and Investments

ITEM 23: List total of current balances in cash, savings, and checking accounts. Do not include IRAs or Keoghs.

ITEM 24: List total current market value of money market funds, mutual funds, stocks, bonds, CDs or other securities.

ITEM 25: List total current market value of all retirement funds, including IRA, Keogh, 401K, and SEP plans or other retirement accounts. List total amount contributed in **2011** for Item 25a.

ITEM 26: Answer Items 26a and 26b for any and all investment real estate (not including the family's primary residence), if applicable. Second homes, rental properties, and land contracts should be included.

ITEM 27: If you own a business, check the Yes box and answer Items 27a and 27b. If you have not filed your **2011** tax return, complete Section K of this application.

ITEM 28: If you own a farm, check the Yes box and answer Items 28a and 28b. If you have not filed your **2011** tax return, complete Section K of this application.

J Unusual Circumstances

Check any and all items that apply to your situation. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

K Business Income

Provide 2011 Business Income Estimates if you have not filed your 2011 Tax Return.

ITEM 1: List estimated total GROSS taxable business income for **2011**.

ITEM 2: List estimated total NET taxable business income/loss for **2011**.

ITEM 3: List the total amount paid by business in **2011** for home rent or mortgage.

ITEM 4: List the total amount paid by business in **2011** for personal automobile.

ITEM 5: List the total amount of personal expenses paid by business in **2011** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in **2011**.

If providing income estimates for more than one business, corporation or farm (Schedule C, Schedule E and/or Schedule F) please list information for each business, corporation or farm separately. Use additional sheet or Section L, if necessary.

L Explanation

If any specific question requires clarification, write a brief explanation in this space. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying.

M Certification, Authorization, and Documentation Requirements

You **must** sign the form in this section. Your signature authorizes PSAS to release the form and attachments to the contracting schools indicated in Section C. By signing the form, you also certify that the information submitted is correct. This application CANNOT be processed without the appropriate signature(s) and the appropriate documentation.

REQUIRED DOCUMENTATION

If you have filed your 2011 IRS Form 1040:

You must submit photocopies of all pages of your **2011** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

If you have *not* filed your 2011 IRS Form 1040:

You must submit photocopies of all **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s), and photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules). ***If this application is submitted after April 15, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS.***

If you are an Independent Contractor or self-employed and have *not* filed your 2011 IRS Form 1040:

You must complete Section K and submit photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules), **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS.***

If you receive non-taxable income:

You must submit photocopies of your **2011** YEAR-END (**01/01/11 - 12/31/11**) Cash Assistance documentation (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student loan and/or grant documentation (for PARENT's education), Social Security Income statements, showing the **TOTAL AMOUNT** received in **2011** for ALL members of the household. If you list any total for line 16, you must identify source(s) in Section L.

Proof of Residency:

You must submit photocopies of your most recent PA-40 Pennsylvania State Return. If you have not filed your PA-40, provide a copy of a Utility Bill (gas, water, or electric) showing your current address.

Diocese of Pittsburgh

SCHOOL CODE LIST*

LIST SCHOOL CODE IN SECTION C

St. Agnes (West Mifflin) 6208
St. Alexis 6210
St. Alphonsus (Wexford) 6211
St. Angela Merici 6213
St. Ann Preschool (Waynesburg) 6251
St. Anne (Castle Shannon) 6152
St. Anthony School Programs 1613
Aquinas Academy (PK-8) 10080
Aquinas Academy (9-12) 10088
Assumption (Bellevue) 6139
St. Bartholomew 6187
St. Bede 6118
St. Benedict the Abbot Preshcool 6266
St. Benedict the Moor 6274
St. Bernadette 6179
St. Bernard 6180
Bishop Canevin High School 6100
Bishop Leonard/St. Mary-Mount Academy 6104
St. Bonaventure 6164
Brookline Catholic 6111
Butler Catholic 6148
Campus School of Carlow University 10081
St. Catherine of Sweden Preschool (Wildwood) 6252
Central Catholic High School 6101
Christ the Divine Teacher Academy 6134
Divine Mercy Academy 6137
St. Elizabeth 6189
St. Frances Cabrini Preschool 6254
St. Gabriel-Sorrowful Virgin Elementary 6212
St. Gabriel-Sorrowful Virgin Parish Preschool 6267
Good Samaritan Preschool 6261
Good Shepherd 6144
St. Gregory 6215
Holy Child 6146
Holy Redeemer 6160
Holy Sepulcher 6163
Holy Trinity 6193
Immaculate Conception (Pittsburgh) 6107
St. Irenaeus 6186
St. James (Sewickley) 6198
St. Joan of Arc 6170
St. John Fisher Preschool 6255
John F. Kennedy 6205
St. John the Baptist (Monaca) 6175
St. John the Baptist (Plum) 6190
St. John the Baptist Parish Preschool (Plum) 6256
St. Joseph (Cabot) 6257
St. Joseph (Corapolis) 6155
St. Joseph Preschool (O'Hara) 6262
St. Joseph (Verona) 6204
St. Joseph High School 6183
St. Joseph Regional (Port Vue) 6191
St. Katharine Drexel 6270
St. Kilian 6265
St. Louise de Marillac 6203
Madonna Catholic Regional 6176
St. Malachy 6169
St. Margaret (Green Tree) 6166
St. Margaret Mary 6216
St. Mary of the Assumption (Glenshaw) 6165
St. Mary of the Assumption Preschool (Herman) 6167
St. Maurice 6162
Mt. Nazareth Learning Center 10089
North American Martyrs 6178
North Catholic High School 6102
Northside Catholic School 6275
Oakland Catholic High School 6103
Our Lady of Fatima 6168
Our Lady of Grace 6196
Our Lady of Lourdes 6268
Our Lady-Most Blessed Sacrament 6184
Our Lady of the Sacred Heart High School 10086
Our Lady of Victory Preschool 6250
St. Patrick (Canonsburg) 6149
SS. Peter and Paul 6217
St. Philip 6156
Providence Heights Alpha 10083
Quigley Catholic High School 6135
St. Raphael 6127
St. Rosalia Academy 6128
Sacred Heart (Shadyside) 6115
St. Sebastian 6194
Serra Catholic High School 6172
Seton-LaSalle High School 6181
SS. Simon and Jude Pre-School 6197
Sister Thea Bowman Catholic Academy 6273
St. Sylvester 6145
St. Teresa of Avila (Perrysville) 6188
St. Therese of Lisieux (Munhall) 6182
St. Thomas á Beckett 6259
St. Thomas More 6142
St. Ursula 6132
St. Valentine Early Childhood Center 6143
Vincentian Academy 10087
St. Vitus 6185
St. Wendelin (Carbon Center) 6150
Word of God 6201

*NOTE: PRE-SCHOOL STUDENTS ARE NOT ELIGIBLE FOR BISHOP'S EDUCATION FUND GRANTS

PARISH CODE LIST*

St. Agnes (Richeyville) 6480
St. Agnes (West Mifflin) 6509
St. Albert the Great 6346
St. Alexis 6511
All Saints 6403
St. Aloysius 6479
St. Alphonsous (Boyers) 6359
St. Alphonsus (McDonald) 6433
St. Alphonsus (Springdale) 6495
St. Alphonsus (Wexford) 6512
St. Andrew 6378
St. Angela Merici 6515
St. Ann (Bulger) 6365
St. Ann (Waynesburg) 6505
St. Anne (Castle Shannon) 6376
St. Anthanasius 6510
Ascension 6424
Assumption 6350
Ave Marie 6351
St. Barbara 6364
St. Bartholomew 6468
St. Basil 6314
St. Bede 6315
St. Benedict the Abbot 6472
St. Benedict the Moor 6316
St. Bernadette 6448
St. Bernard 6450
St. Blaise 6441
St. Bonaventure 6412
St. Camillus 6457
St. Catherine of Siena (Beechview) 6317
St. Catherine of Siena (Wireton) 6519
St. Catherine of Sweden (Wildwood) 6516
St. Cecilia 6483
St. Charles Lwanga 6318
Christ the Divine Teacher 6382
Christ the King 6419
Christ the Light of the World 6394
St. Christopher at the Lake 6477
St. Claire of Assisi 6384
St. Colman 6499
St. Columbkille 6423
Corpus Christi (McKeesport) 6523
St. Cyril of Alexandria 6319
St. Damien (Monongahela) 6525
Divine Mercy 6348
St. Elizabeth (Pleasant Hills) 6474
St. Elizabeth Ann Seton (Carnegie) 6375
Epiphany 6300
St. Felix 6409
St. Ferdinand 6390
St. Fidelis 6440
St. Frances Cabrini 6379
St. Francis of Assisi (Finleyville) 6405
St. Gabriel of the Sorrowful Virgin 6514
St. Gerard Majella 6469
St. Germaine 6353
Good Samaritan (Ambridge) 6341
Good Shepherd (Braddock) 6360
St. Gregory 6521
Guardian Angels 6301
St. Hilary 6504
Holy Angels 6417
Holy Child 6363
Holy Cross 6397
Holy Family (Creighton) 6391
Holy Family (New Brighton) 6459
Holy Innocents 6302
Holy Martyrs 6498
Holy Redeemer 6400
Holy Rosary 6453
Holy Sepulcher 6410
Holy Spirit (Millvale) 6442
Holy Spirit (West Mifflin) 6506
Holy Trinity (Robinson) 6482
Holy Trinity (West Mifflin) 6507
Holy Wisdom 6303
St. Hugh 6374
St. Ignatius 6358
Immaculate Conception (Washington) 6503
Immaculate Conception/St. Joseph 6304
Immaculate Heart of Mary 6305
Incarnation of the Lord 6306
St. Irenaeus 6466
St. Isaac Jogues 6399
St. James (Sewickley) 6489
St. James (Wilkinsburg) 6517
St. James the Apostle 6458
St. Januarius 6478
St. Joan of Arc 6428
St. John (Coylesville) 6388
SS. John and Paul 6432
St. John Capistran 6500
St. John Fisher 6383
St. John Neumann 6407
St. John of God 6434
St. John the Baptist (Baden) 6344
St. John the Baptist (Monaca) 6444
St. John the Baptist (Plum) 6475
St. John Vianney 6320
St. Joseph (Cabot) 6370
St. Joseph (Coraoplis) 6387
St. Joseph (Duquesne) 6395
St. Joseph (Natrona) 6454
St. Joseph (Oakland) 6464
St. Joseph (O'Hara) 6467
St. Joseph (Roscoe) 6484
St. Joseph (Verona) 6502
St. Joseph the Worker 6461
St. Juan Diego (Sharpsburg) 6522
St. Jude the Apostle 6518
St. Justin 6322
St. Kilian 6431
St. Lawrence O'Toole 6323
St. Louise de Marillac 6501
Madonna del Castello 6496
St. Malachy 6426
St. Margaret (Greentree) 6414
St. Margaret Mary 6449
St. Mark 6476
St. Mary (Aleppo) 6338
St. Mary (Cecil) 6377
St. Mary of Mercy 6324
St. Mary of the Assumption (Glenshaw) 6413
St. Mary of the Assumption (Herman) 6418
St. Mary of the Mount 6325
Mary, Mother of Hope 6460
Mary, Mother of the Church 6380
Mater Dolorosa 6381
St. Matthew 6326
St. Matthias 6404
St. Maurice 6406
St. Maximilian Kolbe 6421
St. Michael (Avella) 6343
St. Michael (Butler) 6367
St. Michael (Elizabeth) 6398
Most Holy Name of Jesus 6307
Nativity 6494
St. Nicholas 6443
St. Norbert 6327
North American Martyrs 6447
St. Oliver Plunkett 6408
Our Lady - Most Blessed Sacrament (Natrona Hghts) 6455
Our Lady of Angels 6308
Our Lady of Consolation 6456
Our Lady of Fatima 6422
Our Lady of Grace 6487
Our Lady of Joy 6420
Our Lady of Loreto 6309
Our Lady of Lourdes 6366
Our Lady of Peace 6386
Our Lady of the Miraculous Medal 6439
Our Lady of the Valley 6393
Our Lady of Victory 6416
St. Pamphilus 6328
St. Patrick (Canonsburg) 6372
St. Patrick (McKeesport) 6437
St. Patrick (Oakdale) 6465
St. Patrick/Stanislaus 6329
St. Paul (Butler) 6368
St. Paul Cathedral 6330
St. Peter (Butler) 6369
St. Peter (North Side) 6331
St. Peter (Slippery Rock) 6493
SS. Peter and Paul (Beaver) 6347
St. Philip 6389
St. Philomena 6349
St. Pio (Blawnox/Harmar/Indianola) 6524
St. Pius X (Brookline) 6332
Prince of Peace 6310
Queen of the Rosary 6411
St. Raphael 6333
St. Regis 6334
Resurrection (Brookline) 6311
Resurrection (West Mifflin) 6508
St. Richard 6481
Risen Lord 6312
St. Rita 6513
St. Robert Bellarmine 6396
St. Rosalia 6335
St. Rose of Lima 6392
Sacred Heart (Emsworth) 6402
Sacred Heart (Shadyside) 6313
St. Scholastica 6342
St. Sebastian 6485
SS. Simon and Jude 6488
St. Stephen 6336
St. Susanna 6470
St. Sylvester 6362
St. Teresa of Avilla (Perrysville) 6471
St. Therese of Lisieux (Munhall) 6452
St. Thomas (Clarksville) 6385
St. Thomas á Becket 6425
St. Thomas Aquinas 6371
St. Thomas More 6354
St. Titus 6339
Transfiguration (Russellton) 6486
St. Ursula 6340
St. Valentine 6356
St. Victor 6345
St. Vincent de Paul 6462
St. Vitus 6463
St. Wendelin (Carbon Center) 6373
St. Wendelin (Carrick) 6337
St. Winifred 6451
Word of God 6497

NOT CATHOLIC 6000

See Reverse for School Codes

DIOCESE OF PITTSBURGH
SPECIAL EDUCATION VERIFICATION
SUPPLEMENTAL FORM

This form applies ONLY to families with Special Needs Students

After completing this form, take it to the school Principal or Administrator for review and signature.
Then, include this form with your completed Student Aid Form.

Parent/Guardian (from PSAS Application Section A):

_____
Last Name First Name

List the student(s) from Section C of the application who qualify as a **Special Needs Student(s)**

	Student Name	School Name	School Code
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

By signing below, I, the school Principal/Administrator, verify that the above student(s) is/are Special Needs student(s) as defined by the PA Department of Education.

Signature of Principal/Administrator: _____ Date: _____

Print Name: _____ Phone Number: _____

This Form MUST be completed and submitted with the PSAS Student Aid Form if you are applying for a Special Needs Student or a student attending a Special Education School.