

## Required Document Checklist – *Earn to Learn*® Application

Please check *Earn to Learn*'s eligibility requirements to see if you may qualify at [earntolearn.org/eligibility](http://earntolearn.org/eligibility)

Please read through this entire packet carefully. If you are having trouble with a certain document, please contact *Earn to Learn* Staff or refer to the Eligibility Appointment Packet Guide. You will need to establish who your household is in order to complete your application and collect all the Required Documents, please refer to the Eligibility Appointment Packet Guide to assist you in this process.

*Earn to Learn*'s application process verifies that applicants meet multiple eligibility requirements, including household income and FAFSA EFC (Free Application for Federal Student Aid, Expected Family Contribution) of \$6,000 or less. The items in the checklist below are required for your *Earn to Learn* application. Documentation that is not listed below may also be required to complete an application.

- Household Information Form** (attached)
- Applicant's Social Security Card**
- Applicant's State Issued Photo ID** (expiration date must be at least 90 days after interview)
  - o Note: School IDs are not accepted
- FAFSA Official Student Aid Report (SAR) Promissory Note** (attached) **AND Expected Family Contribution (EFC)** - If you apply before October 1<sup>st</sup> or have not completed your FAFSA or have not received your Official SAR, you will need to submit both documents. Access the FAFSA4Caster via <https://fafsa.ed.gov/FAFSA/app/f4cForm>, save a copy of your FAFSA4Caster and ensure your submission includes the EFC. Your application is contingent upon your submission of the FAFSA Official Student Aid Report and official EFC of \$6,000 or less.
- OR-
- FAFSA Official Student Aid Report (SAR)**- You will receive this document when your FAFSA has been completely processed. We require the official report that is sent to you via mail 7-10 business days after your FAFSA is processed. Your application is contingent upon your FAFSA Official Student Aid Report and official EFC of \$6,000 or less.
- Federal Tax Return**- Form 1040, 1040A, or 1040EZ and all attachments / schedules for the most recent year, for you (if you filed), your spouse (if applicable) and your FAFSA parent if you are under 24 years of age (refer the Eligibility Appointment Guide if you need to determine your FAFSA parent/parents).
  - o **If your household did not submit taxes, please refer to the chart included in the Eligibility Appointment Packet Guide.**
- No Tax Return Affidavit**- (attached) must be filled out and submitted by applicant or applicants' spouse or FAFSA parent who did not submit Federal Tax Returns in the most recent year.



## How to Submit Required Documentation (choose one):

- 1- Bring documents in person to your Eligibility Appointment.
- 2- To securely send sensitive personal information via email, we require you to use SendInc. To do this, create your own free account at [www.sendinc.com](http://www.sendinc.com) and send to *Earn to Learn* Staff through this site.
- 3- Fax them to 877-266-0662. Include a cover letter with your first and last name, phone number, total number of pages, and name of your *Earn to Learn*® Staff contact.

## Required Documents – Sending Secure Emails

The *Earn to Learn* Program and our staff is dedicated to ensuring each participants privacy and confidentiality. Understanding that sensitive documentation is needed to income verify participants and households, as well as open savings accounts once participants enroll with *Earn to Learn*, we use an encrypted email service called SendInc.

To securely send sensitive personal information via email, we require you to use SendInc. *Earn to Learn* will only send documentation to participants with sensitive personal information, such as your Social Security number or date of birth, via SendInc. Upon receiving and opening one of these emails from *Earn to Learn* you will be required to create a SendInc account to view the information.

SendInc is free for our participants to use. Visit [www.sendinc.com](http://www.sendinc.com) to create your account.

## Privacy Disclosure

**Why do we ask for all of these documents, and will I be required to submit more documents than initially required?**

The *Earn to Learn* program serves low-to-moderate income households. We have to make sure that we are serving the families the scholarship was created for. *Earn to Learn* will only ask for documents if they are required. It is the goal of *Earn to Learn* to work with the student and their family to qualify them for the program and not to find ways to disqualify them.

**What happens with my documents once you receive them?**

*Earn to Learn* stores all information and documents we collect in a secure database and server. The database and server are protected with industry-standard encryption and safeguards and cannot be accessed by anyone but *Earn to Learn* Staff. All *Earn to Learn* Staff have passed background checks and will not share your information with anyone for any reason. Any paper documents you provide us are stored securely in our offices until we have processed your application. Once your application is approved or denied, all paper documents are shredded.

***Earn to Learn* does not report to the Internal Revenue Service (IRS) or the Immigration and Naturalization Service (INS).**



# Household Information Form

## PART I: Fill in the following information for the entire household

| Full Legal Name<br>(Refer to Government Issued Identification) | Age | Relationship to Applicant        | Employed (Y/N) | Monthly Salary (\$) | Filed Taxes (Y/N) |
|--|-----|----------------------------------|----------------|---------------------|-------------------|
| 1.   |     | Applicant                        |                |                     |                   |
| 2.   |     | *FAFSA PARENT #1 OR SPOUSE       |                |                     |                   |
| 3.   |     | *FAFSA PARENT #2 (If Applicable) |                |                     |                   |
| 4.   |     |                                  |                |                     |                   |
| 5.   |     |                                  |                |                     |                   |
| 6.   |     |                                  |                |                     |                   |
| 7.   |     |                                  |                |                     |                   |
| 8.   |     |                                  |                |                     |                   |

\* For more information please review the Eligibility Appointment Packet Guide (page 2)

## PART II: Fill in the following FAFSA Information for the applicant

- Have you submitted your FAFSA\*?  Yes  No  I Don't Know
- Have you completed any FAFSA corrections (if applicable)?  Yes  No  I Don't Know
- Expected Family Contribution (EFC) level on Student Aid Report (SAR)\*\*? \$ \_\_\_\_\_
- Are there any other household members that will be utilizing the FAFSA for the current or up coming school year?  
 Yes  No  I Don't Know

\*You can submit your FAFSA on October 1.

\*\*The Estimated Family Contribution value can be found on the top right corner of the Official Student Aid Report. If you have not submitted your FAFSA please use the FAFSA4caster (<https://fafsa.ed.gov/FAFSA/FAFSA/app/f4cForm>)

## PART III: Fill in the following address information for the entire household

Applicant Physical Address: Street \_\_\_\_\_  
 City, State \_\_\_\_\_ Zip \_\_\_\_\_  
 Mailing address if different from Physical Address: Street \_\_\_\_\_  
 City, State \_\_\_\_\_ Zip \_\_\_\_\_

## PART IV: Signature

*I, the Earn to Learn applicant, to the best of my ability, attest that the information I have entered on this form is accurate and true for my household.*

Applicant Printed Name \_\_\_\_\_ Applicant Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent/Guardian Printed Name \_\_\_\_\_ Parent/ Guardian Signature \_\_\_\_\_ Date \_\_\_\_\_  
 (If applicant is currently under the age of 18)





## FAFSA Official Student Aid Report (SAR) Promissory Note

I, \_\_\_\_\_, hereby understand that my Earn to Learn  
(Print Name)

Application is incomplete until Earn to Learn receives a copy of my Official FAFSA Student Aid Report (SAR). I understand that my FAFSA Expected Family Contribution (EFC) must be at or below \$6,000. I understand that if my FAFSA EFC is over \$6,000 my Earn to Learn participation will be terminated, my savings will be returned to me and my scholarship will not be processed.

I understand that I must also submit in addition to this Promissory Note my FAFSA4Caster (<https://fafsa.ed.gov/FAFSA/FAFSA/app/f4cForm>) or an unofficial Student Aid Report with the most accurate and up to date information I can provide, including my EFC. I certify that the information presented in the FAFSA4Caster is true and accurate to the best of my knowledge. The undersigned further understand(s) that providing false representations herein constitutes an act of fraud. False, misleading, or incomplete information may result in the termination of participation in the program.

I understand that if I do not submit my SAR to Earn to Learn by the deadline (**Fall start term: May 1<sup>st</sup>, Spring start term: October 1<sup>st</sup>**) my application may be terminated, or my scholarship may be negatively impacted; including late processing, late fees and other university and Earn to Learn related consequences.

I understand that each university has specific FAFSA Priority Consideration deadlines which allows me to be considered for the most funding available at the institution. They are:

NAU (School Code: 001082) - November 15

ASU (School Code: 001081) - January 1

UofA (School Code: 001083) - March 1

*I have read and understand the contents of this FAFSA Official Student Aid Report Promissory Note, and I agree to meet my responsibilities under it. Any questions I had about Earn to Learn have been answered to my satisfaction.*

\_\_\_\_\_  
Applicant (Print)

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent/Guardian (Print)

\_\_\_\_\_  
Parent/Guardian Signature

\_\_\_\_\_  
Date



## Tax Return Affidavit

**REQUIRED** for the following household members who did not file federal taxes for the most recent tax year:

Earn to Learn applicant

Applicant's spouse (if applicable)

FAFSA parent/guardian/step-parent (if applicable)

I, \_\_\_\_\_, hereby certify that I did NOT file taxes for the  
(Print Name)  
most recent tax year.

I also understand that:

- I may be required to submit a IRS Verification of Non-filing Letter to the university to complete my FAFSA Verification Documents.
- This letter can take up to 6 weeks to receive and is available after June 15<sup>th</sup> for the current tax year or anytime for the prior three tax years.
- I can access/request this letter by following instructions here:  
<https://www.irs.gov/individuals/tax-return-transcript-types-and-ways-to-order-them>

Under penalty of perjury, I certify that the information presented in this certification is true and accurate to the best of my knowledge. The undersigned further understand(s) that providing false representations herein constitutes an act of fraud. False, misleading, or incomplete information may result in the termination of participation in the program.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

