

2019-2020

California Dream Act Application Worksheet www.caldreamact.org



Do not mail this worksheet

The California Dream Act Application is the financial aid application for Assembly Bill (AB) 540 eligible students. Complete this worksheet before starting the online or paper application to make sure you have all of the information you will need to complete and submit the application. Full application instructions and the application can be found at www.caldreamact.org. Be sure to complete the correct year's application. For example, complete the 2019-2020 if you plan to attend college in the fall 2019 or the spring 2020.

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

- Attended a California high school for at least three years,
 - Attainment of credits in California from a California high school equivalent of at least three or more years of full-time high school coursework and a total of three or more years of attendance in California elementary schools, California secondary schools, or combination of those schools.
 - Graduated or will graduate from a California high school or attainment of General Education Development (GED), High School Equivalency Test (HiSET), or Test Assessing Secondary Completion (TASC),
 - Do not hold a valid non-immigrant visa (F, J, H, L, A, B, C, D, E, etc.)*
- * If you have Temporary Protected Status or hold a U visa select "Yes"

If you meet these requirements, use this worksheet as a guide on how to answer the questions when you fill out the California Dream Act Application (CADAA). The CADAA is available at www.caldreamact.org. The California Student Aid Commission processes the CADAA. Any financial aid received can only be used at eligible California institutions. (AB) 540 was passed in 2001 to allow non-resident students in California to pay in-state resident fees at California's public colleges and universities. In October 2011, AB 131 was signed into law and allows students eligible for AB 540 to also apply for State University Grants, Board of Governors fee waivers, and Cal Grants. Students must verify with their college the financial aid filing requirements for that college.

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

Need Help?

For help with this worksheet
send an email to studentsupport.csac.ca.gov, or call
888-224-7268

Applying by the Deadlines

Submit your CADAA as early as possible. For the 2019-20 school year, the state Cal Grant program has a March 2, 2019* filing deadline. A school certified non-SSN GPA verification form is available at www.caldreamact.org and is also required for the Cal Grant program. Many colleges and universities also use March 2 as a priority deadline, but you must check with your college to determine its application deadlines and filing requirements.

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

Using Your Tax Return

You will use your 2017 income tax return to complete the 2019-2020 California Dream Act Application. Do not miss any of your colleges' deadlines. If you or your parents will file a 2017 income tax return, you will need the tax returns and/or W-2 forms to complete the CADAA. If you or your parent's will not file an income tax return, enter the total the wages they have earned from working during 2017.

Filling out the California Dream Act Application

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

After you complete this worksheet, go online to www.caldreamact.org and complete the CADAA. **Do not mail this worksheet.** After your CADAA has been processed, you will be able to see your responses by viewing your California Student Aid Report. If you would like to make changes to your CADAA, login to www.caldreamact.org and retrieve your CADAA.

*State applications with deadlines that fall on a Saturday, Sunday or holiday will be accepted on the next business day.

Section 3 - PARENT INFORMATION

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

Parent 1 (father, mother, or stepparent)
 Parent 1’s Social Security Number or Individual Tax-payer Identification Number (ITIN), if they have one
 Parent 1’s name
 Parent 1’s date of birth
 Check here if Parent 1 is a dislocated worker

Parent 2 (father, mother, or stepparent)
 Parent 2 Social Security Number or Parent 2’s Individual Tax-payer Identification Number (ITIN), if they have one
 Parent 2’s name
 Parent 2’s date of birth
 Check here if Parent 2 is a dislocated worker

For 2017, have your parents completed an IRS income tax return or another tax return?
 My parents have already completed a 2017 tax return
 They will need their 2017 tax returns and/or W-2 forms to complete the Dream Act Application.
 My parents will file, but have not yet completed a 2017 tax return
 My parents are not going to file an income tax return
 If your parents will not be filing an income tax return, they will enter the total the wages they have earned from working during 2017.

What was your parents’ adjusted gross income for 2017?
 Skip this question if your parents did not file taxes. Adjusted gross income is on IRS Form 1040—Line 37; 1040A—line 21; or 1040EZ—line 4.

Questions 92 and 93 ask about earnings (wages, salaries, tips, etc.) in 2017. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); on 1040A—line 7; or 1040EZ—line 1. If any individual earning item is negative, do not include that item in your calculation.

How much did Parent 1 earn from working in 2017?

How much did Parent 2 earn from working in 2017?

Parent's Asset Questions:

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

In 2017 or 2018, did anyone in your parents’ household receive: (Check all that apply.)

Supplemental Security Income (SSI) CalWORKs
 Cal Fresh Special Supplemental Nutrition Program for Women, Infants and Children (WIC)
 Free or Reduced Price School Lunch

Note: Outside of California, Cal Fresh is known as Food Stamps and CalWorks is known as Temporary Assistance for Needy Families (TANF)

Additional Financial Information

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

Untaxed Income

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

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

Section 4 - STUDENT INFORMATION

For 2017, have you completed your IRS income tax return or another return?

- I have already completed a tax return
You will need your 2017 tax returns and/or W-2 forms to complete the CADAA.
- I will file, but have not yet completed my 2017 tax return
- I am not going to file a 2017 income tax return

If you will not be filing an income tax return, enter the total the wages they have earned from working during 2017.

What was your (and spouse's) adjusted gross income for 2017?

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

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The following questions ask about earnings (wages, salaries, tips, etc.) in 2017. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on the IRS Form 1040—Line 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1.

How much did you earn from working in 2017?

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- Check here if you are a dislocated worker

How much did your spouse earn from working in 2017?

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- Check here if your spouse is a dislocated worker

Student Asset Questions:

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

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In 2017 or 2018, did anyone in your household receive: (Check all that apply)

- Supplemental Security Income (SSI)
- Cal Works
- Cal Fresh
- Special Supplemental Nutrition Program for Women, Infants and Children (WIC)
- Free or Reduced Price School Lunch

Note: Outside of California, Cal Fresh is known as Food Stamps and Cal Works is known as Temporary Assistance for Needy Families (TANF)

Did you (and/or your spouse) have any of the following items in 2017? Check all that apply. Once online, you may be asked to report amounts you (and/or your spouse) have paid or received.

Additional Financial Information

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

Untaxed Income

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

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

Complete CADAA instructions can be found at www.caldreamact.org by clicking on the California Dream Act Information & Resources Link.

NOTES:

Do not mail this worksheet. Go to www.caldreamact.org to complete and submit your application. You can also talk with your college's financial aid office about other types of student aid that may be available.