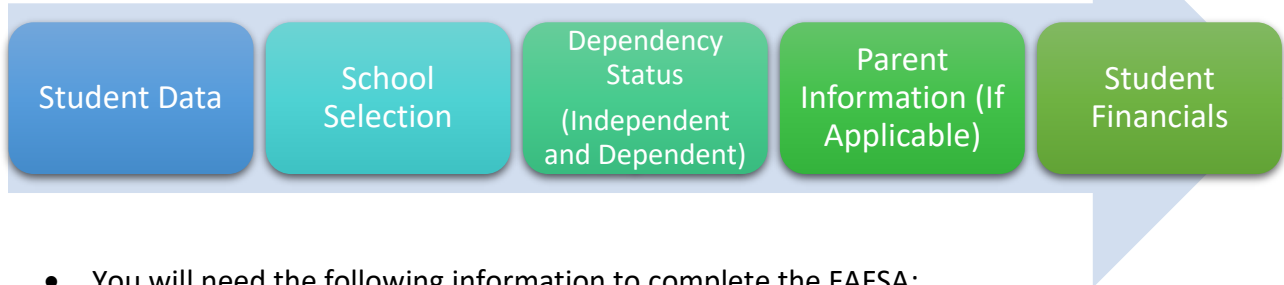


# FAFSA Toolkit

## What is the FAFSA?

- FAFSA is the Free Application for Federal Student Aid. This provides grants (federal and local), work study, and loans for students attending two year technical and vocational schools and public and private four-year colleges. FAFSA provides a significant amount of financial aid to assist in paying for college.
- The following sections are a part of the FAFSA:



- You will need the following information to complete the FAFSA:
  - Social Security Number (for Self and Parent)
  - Alien Registration Number (If Non-Citizen)
  - Federal Income Tax Records, W2s, and Other Financial Records (for Self and Parent)
  - Bank Statements and Records of Investments (If Applicable for Self and Parent)
  - Records of Untaxed Income (If Applicable for Self and Parent)

## Beginning the Process with FAFSA

1. If you are a new user, create a FSA ID. You will need to create IDs for yourself and guardian. Go to [www.studentaid.gov/](http://www.studentaid.gov/) and select [Create an Account](#) to begin. You will need social security numbers and email addresses.
2. Go to [www.fafsa.gov](http://www.fafsa.gov) to access the Application. If this is your first time filling out the FAFSA, click [Start Here](#) under the “New to the FAFSA Process?” header. If you are a returning user (you have completed a FAFSA before, whether this year or another), click [Log In](#).
3. When you login, you will need to use your email, phone number, or FSA ID. Enter your password and login.
4. Upon login, a disclaimer will appear. This is a reminder to use accurate information and that this is a secure website. Click [ACCEPT](#) to proceed.
5. Choose the upcoming school year to begin applying for Financial Aid.









6. Create a save key (something simple and easy to remember) to return to your application if you time out or need to return later.

## Reminders as You Progress Through FAFSA



- Put accurate and up-to-date information.
- Do not read too much into the question and enter the information asked in the prompt.
- If you make a mistake, you can return and correct errors, even after submission.
- If you have any additional questions, call the FAFSA Customer Service Line at 1-800-433-3243 for technical support or content assistance.

## Completing the FAFSA:

### I. Enter Student Demographics

1. Enter your social security number, first name, middle initial, last name, and date of birth. (If you do not have a middle name, leave the initial blank.) Click **NEXT**  .
2. Enter your email address, re-enter it (to ensure accurate spelling), and telephone number. All information must be accurate. Click **NEXT**  .
3. Enter your permanent street address, city (and country if outside USA), state, and ZIP code. Click **NEXT**  .
4. The next set of questions will ask you if you have lived in your designated state for at least five years (Yes or No) and if you are a U.S. Citizen. Enter the proper information and click **NEXT**  .
5. You will need to put your high school completion status and postsecondary degree that you are obtaining when you begin the school year. FAFSA will also ask if you have completed your bachelor's degree when you begin the school year, your college grade level when you begin and if you are interested in work-study. Answer the questions and click **NEXT**  .
6. The next set of questions asks for gender (choose male or female). If male, you must be registered with the Selective Service System to obtain financial aid. It will ask if you have already registered, and if you want to register. Click yes or no. Click **NEXT**  .
7. Enter your driver's license number and state. Click **NEXT**  .
8. The application will ask if you have been in the foster care system at any time. If yes, you will be classified as an independent student. If no, you will need to enter parental information. Identify one parent to name as Parent 1 and another to name as Parent 2. Enter highest degree of school completed by each one. Click **NEXT**  .

### II. Enter School Selection Information

1. Next, you will need to enter school information. You will need to enter the name of your high school, city, and state in which it is located. Click the **SEARCH**  button to find an exact match for your school.
2. On the next page, a list of schools to reflect your search will appear. Select your school by clicking **SELECT** and then click **NEXT**  .
3. Now, you will need to enter your college information. If you have your college's Federal School Code, you can select Yes and enter the code. If you do not have the code, you

will need to search for the college. To do so, simply enter the state, city, and name of your desired college. Click

4. On the next page, a list of schools to reflect your search will appear. Select your desired school by checking the box next to your school.
5. You can add up to 10 colleges to compare aid packages for each school. To add more schools, select **ADD MORE SCHOOLS** to repeat the process until you are done.
6. Next, you will need to choose your desired housing plan (On or Off-Campus) for each college listed. When you are done, click **NEXT**.

### III. Enter Dependency Status






1. First, you will need to indicate whether you are a married or unmarried individual. Enter the proper information from the drop-down box. Click **NEXT**.
2. The next set of questions will decide if you have dependents. There are two questions: the first asks if you have dependents that receive more than half of their support from you and the second asks if you have dependents that live with you and receive more than half of their support from you. Select the proper answers and click **NEXT**.
3. There is another set of questions to determine dependency. Select the set of answers that apply to you. Click **NEXT** when done. The following questions appear:
  - a. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
  - b. Are you a veteran of the U.S. Armed Forces?
  - c. At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?
  - d. As determined by a court in your state of legal residence, are you or were you an emancipated minor?
  - e. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?
  - f. None of the above
4. The next question asks if you were homeless or at-risk of being homeless. Select Yes or No and click **NEXT**.

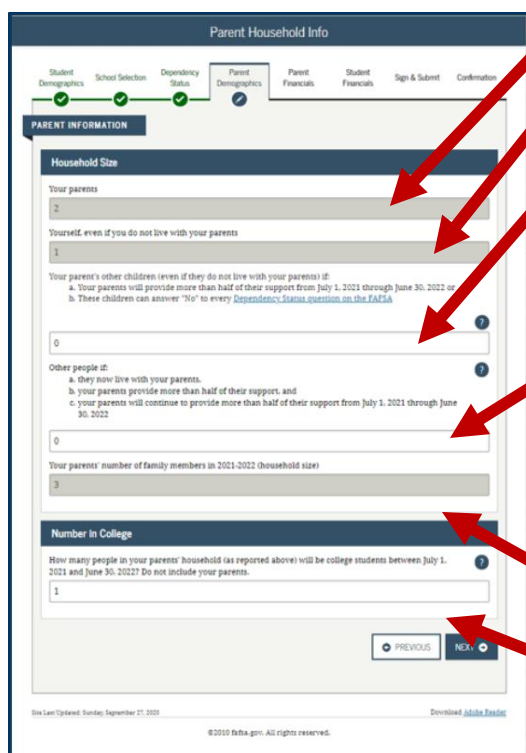
#### Dependent Student Screen:

5. The next screen will indicate whether FAFSA has identified you as an independent or dependent student. If you are a dependent student, you will need to enter tax information for your parent(s). Select the option to do so ("I will provide information about my parents"). If you are an independent student, you will only need to enter your information. Click **NEXT** when done.

#### Independent Student Screen:

## IV. Enter Parent Demographics (Dependent Students)

1. This set of questions begins with general information about your parents. First, you will need to select the marital status of your parents, along with the month and year your parents married or remarried. Click **NEXT**  when complete.
  - a. Note that parent refers to the biological or adoptive individual determined by the state to be a parent. Grandparents, foster parents, older siblings, widowed stepparents, and legal guardians are not parents unless there was a legal adoption.
  - b. You may choose “Married or Remarried,” “Separated,” or “Unmarried and Both Legal Parents Living Together.”
2. Enter the social security number, last name, first initial, date of birth, and email address for Parent 1. (Remember to use the same designation of Parent 1 and 2 as chosen before.) Click **NEXT** .
3. Now, enter the social security number, last name and first initial, and date of birth for Parent 2. When you are done, click **NEXT** .
4. The next question will ask if your parents have lived in the state for the last five years. Simply choose Yes or No. Click **NEXT** .
5. You will need to indicate the size of your household. Click **NEXT** .





- a. On the first line, list the number of parents currently in the household.
- b. On the second line, enter the number “1” to indicate yourself.
- c. On the third line, enter the number of dependent siblings in the home. They do not have to reside in the household (this may occur with divorced or separated parents), but they must be financially dependent on the parents.
- d. On the fourth line, enter the number of other individuals that live with your parents and receive more than half of their support from them. This may be grandparents or other individuals that live in the home.
- e. The fifth line will automatically generate a value of total family members in the home.
- f. On the sixth line, you will need to indicate the number of individuals in the home that will be attending college for the upcoming school year.

## V. Enter Parent Financials (Dependent Students)

1. For this section, you will need tax records from the appropriate year for your parents. Indicate whether your parents already completed their tax return, or if they will file and have not yet completed a tax return, or if they will not file an income tax return.



2. Select the type of income tax return they will complete (IRS 1040 [most common option], Foreign Tax Return, IRS 1040NR, or IRS 1040NR-EZ). Indicate the filing status used (jointly or independently).
  - a. OPTIONAL: If you would like to avoid manually entering tax information, you may use the IRS Data Retrieval Tool by clicking [LINK TO IRS ↔](#) . This opens a separate page directly to the IRS website. This option may or not work, as it depends on the availability of electronic tax information.
3. Click [NEXT →](#) when ready.
4. You will again be presented with the option to [LINK TO IRS ↔](#) . You may either do so or click [No Thanks](#). This will allow you to proceed to the next screen.
5. If you chose to manually enter tax information, you will now need to enter information directly from your parents' tax records.
  - a. First, enter the adjusted gross tax income from IRS Tax Form. Click [NEXT →](#)
  - b. Now, enter the amount that Parents 1 and 2 made from working. This should include wages, salaries, and tips. Enter the total for each designated parent. When done, click [NEXT →](#) .
  - c. Additional tax questions may appear based on IRS Tax form completed follow the instructions for completion.
  - d. Answer Yes, No, or Don't Know to the question of whether or not one of your parents is a Dislocated Worker.
  - e. The next section asks if you, your parents, or anyone in the household receives benefits from any of the federal benefits programs listed below:
    - Medicaid
    - Supplemental Security Income (SSI)
    - Supplemental Nutrition Assistance Program (SNAP)
    - Free or Reduced School Lunch
    - Temporary Assistance for Needy Families (TANF)
    - Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
    - None of the Above
  - f. When you have entered the correct responses, click [NEXT →](#) .
  - g. Enter the total amount of income tax for the previous year. This is found by going to IRS 1040 line 14 – Schedule 2, line 2. Click [NEXT →](#) .
  - h. There may be a series of additional Parent Questions for Tax Filers. You will need to enter the corresponding amounts and click [NEXT →](#) when done. Place zero in areas not applicable to your circumstance:
    - Combat pay or special combat pay (zero for enlisted persons and warrant officers).
    - Student college grant and scholarship aid reported to the IRS in your parents' income.
    - Education credits.
    - Untaxed portions of IRA distributions and pensions.
    - IRA deductions and payments.
    - Tax exempt interest income.
  - b. Enter the next set of values and click [NEXT →](#) when done:

- Child support paid because of a divorce or separation as a result of a legal requirement.
  - Earnings from work under a Cooperative Education Program offered by a college.
  - Taxable earnings from need-based employment programs.
- c. Enter the next set of values and click **NEXT**  when done:
- Child support received for all children.
  - Housing, food, and other living allowances paid to members of the military, clergy, and others.
  - Payments to tax-deferred pension and retirement savings plans.
  - Veterans noneducation benefits.
  - Other untaxed income not reported.
- d. You will then be asked if you want to enter information about your parents' assets. You can choose Yes or No before proceeding. If yes, you will need to answer the following prompts and click **NEXT**  when done:
- Current balance of cash, savings, and checking accounts.
  - Net worth of investments including real estate (not including current home).
  - Net worth of current businesses and investment farms.

## VI. Enter Student Financials (Dependent and Independent Students)



1. Revisit Part V: Parent Financials and follow the same steps. This time, ensure that you are entering your (and your spouse, if applicable) information.

## VII. Sign and Submit FAFSA

1. A question will appear that asks if you are a preparer. Only indicate Yes if someone else did the FAFSA for you. This is rare; if you completed the application by yourself or with a parent, the correct selection is No. Click **NEXT** .
2. You will now see a summary of the FAFSA which allows you to review the information entered. If you see an error, simply return to that section to correct the information. If everything is correct, then click **NEXT** .
3. Both you and a parent need to sign the FAFSA with your FSA ID. (If Independent, only the student needs to sign.) Click the following icons to provide the signatures before proceeding:

**PROVIDE STUDENT SIGNATURE** 

**PROVIDE PARENT SIGNATURE** 

4. You will need to read and select Agree to a statement agreeing that you understand that this is only for funds for higher education, that you are not in default with current student loans, that you do not currently owe money back on a grant, that you will notify your school if you default on your loans, and that you will not receive a Federal Pell Grant for more than one school at a time. Once you click the Agree button, click **NEXT** .
5. Repeat the signing process until the FAFSA is completely signed by each party. When the screen looks like the graphic shown, click **SUBMIT MY FAFSA NOW** .

## Dependent Signature Page:

Signature Status

Student Demographics School Selection Dependency Status Parent Demographics Parent Financials Student Financials Sign & Submit Confirmation

You have provided all necessary signatures. Click **Submit My FAFSA Now** to submit your FAFSA.

Student Signed With FSA ID

Social Security Number: XXX-XX-1111  
Last Name: last  
Date of Birth: 06/06/2000  
Signature Status: Signed Electronically

Parent Signed With FSA ID

Social Security Number: XXX-XX-2222  
Last Name: last  
Date of Birth: 06/06/1960  
Signature Status: Signed Electronically

PREVIOUS SUBMIT MY FAFSA NOW

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## Independent Signature Page:

Signature Status

Student Demographics School Selection Dependency Status Parent Demographics Parent Financials Student Financials Sign & Submit Confirmation

You have provided all necessary signatures. Click **Submit My FAFSA Now** to submit your FAFSA.

Student Signed With FSA ID

Social Security Number: XXX-XX-4006  
Last Name: Last  
Date of Birth: 01/01/1990  
Signature Status: Signed Electronically

PREVIOUS SUBMIT MY FAFSA NOW

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- Once you submit the FAFSA, you will receive a confirmation page with your EFC (Expected Family Contribution). Your schools will reach out soon afterwards with awards packages so you can better understand how your aid will translate to cover college costs.

## Final FAFSA Notes

- If you find that you made an error after submitting the FAFSA, you can go back and edit and resubmit the application. When you login, you will click on the section that states, “[Make FAFSA Corrections.](#)”
- If you need to leave and finish later, make sure that you keep your save key (made at the beginning of this process) so that you can do so.
- Upon submission, you may have further steps you will need to take. The status of your final application may be one of the following:
  - Processing: This is normal. The application takes, on average, three to six days to be made available to the schools.
  - Processed Successfully: Your application is complete and processed.
  - Missing Signatures: You submitted the application, but you are missing electronic signatures.
  - Action Required: Contact your school directly to resolve this issue.
    - You may also be selected for verification by the school. This is how the school confirms that the data reported on your FAFSA is accurate. If selected, your school will request additional documentation to ensure that the information reported is correct. Make sure to complete this by the school’s deadline, or else you will not receive your aid in time.

## Additional FAFSA Resources

- <https://studentaid.gov/sites/default/files/fafsa-process.png>
- <https://studentaid.gov/apply-for-aid/fafsa/filling-out>
- <https://studentaid.gov/sites/default/files/2021-22-fafsa-worksheet.pdf>
- <https://studentaid.gov/sites/default/files/transfer-tax-info-to-fafsa.png>
- How to Fill out the FAFSA: <https://www.youtube.com/watch?v=LK0bbu0y5AM>
- Determine Dependency Status: <https://www.youtube.com/watch?v=dEbxRjILus>