

FAFSA Basics & Demonstration

FA 101 – March 2024

PRESENTED BY

Jessica Whittier, College Access Counselor



Filing the FAFSA

- Dependent Student w/
 Student Starting the
 FAFSA
- Dependent Student w/
 Parent Starting the
 FAFSA
- Other Scenarios
- After FAFSA Submission



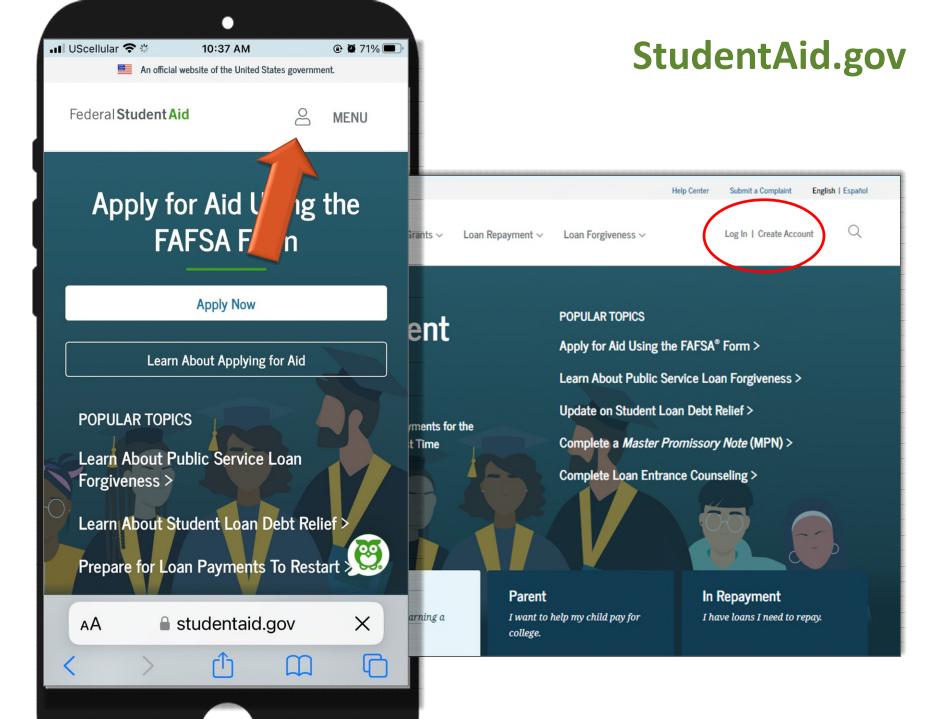


Steps to Get Ready to File a FAFSA

Contributors Must Create Federal Student Aid

Contributors without an FSA ID should create an account at least several days prior to filing the FAFSA).

- If FSA ID has not been authenticated manual entry of all tax related questions will be required.
- Accounts are created at StudentAid.gov
 - Individuals will need a unique email address that can be accessed as it must be verified.
 - Students should not use their high school email address.
 Instead, create a new email address!





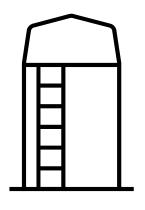
Filing the FAFSA Dependent Students



The FAFSA is now a Roles-Based Form

2024-25 FAFSA is a *Roles-Based* form

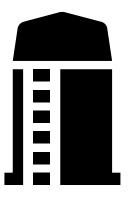
Student Section



Either student or parent can start the FAFSA and they will **"invite"** the other to complete the FAFSA.

The invite is what connects the student and parent sections of the FAFSA.

Parent Section



Based on our limited experience, it appear to best **if** everyone is available and parents are **willing** to provide SSN, to have the student start the FAFSA.

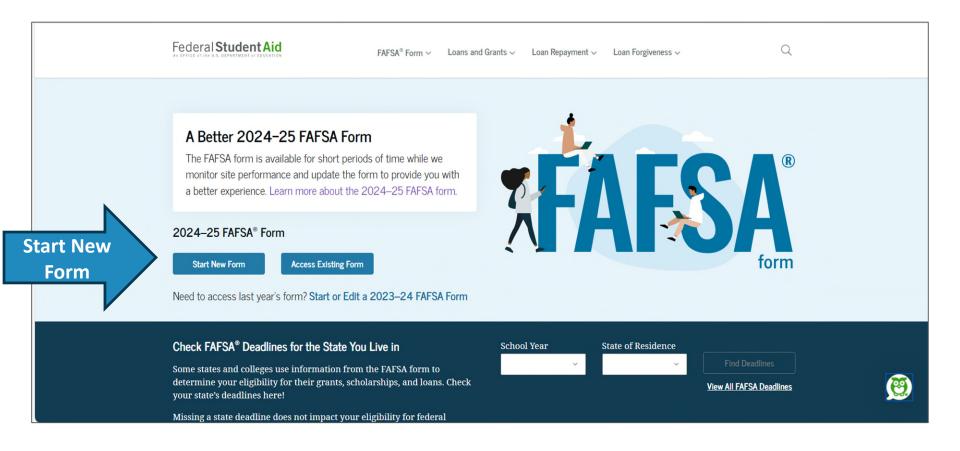
If the student is not available or if parents are unwilling to share their SSN, parents can start the FAFSA.



Dependent Student Student Starts the FAFSA

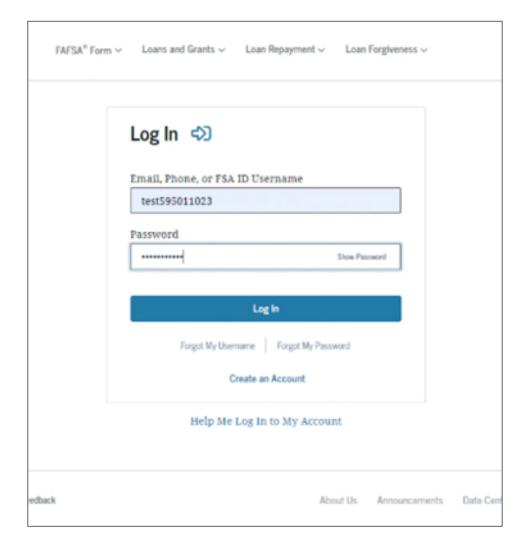


For the purpose of today's demonstration, the **student starts the FAFSA** (but will provide other scenarios afterward).

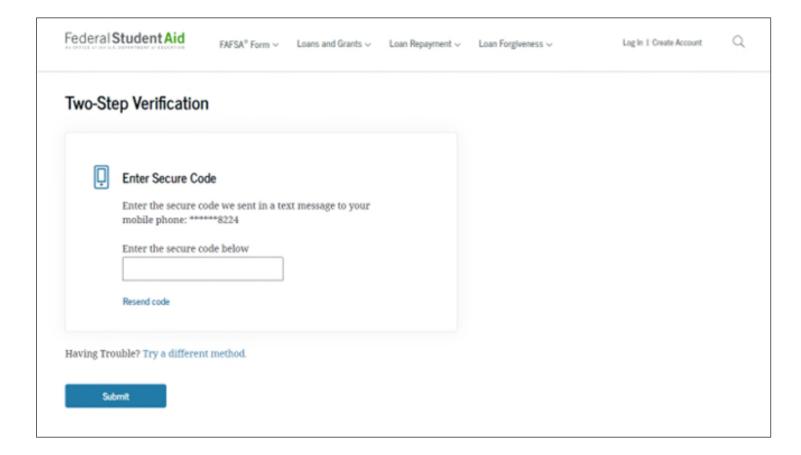




- If student is not logged into StudentAid.gov, they'll be taken to the Log In screen.
- Link to retrieve username and to reset password.
- If no account can click on "Create Account."
- When logging in, people are often required to confirm contact information.



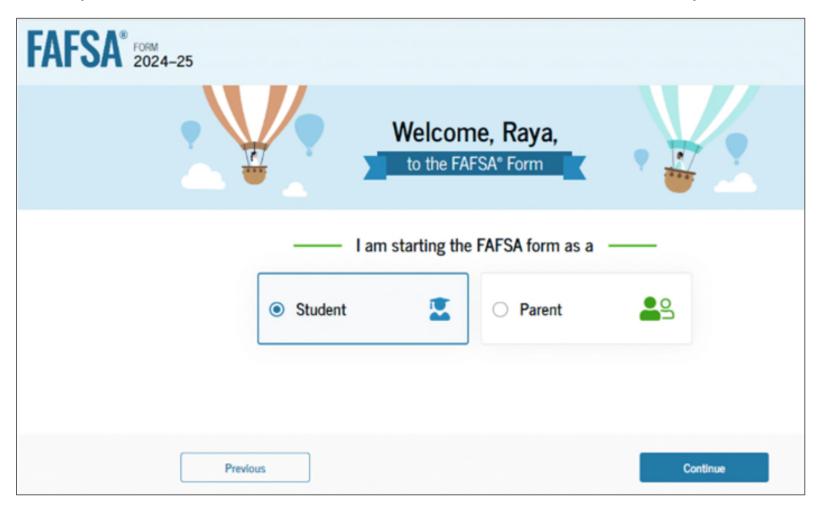




Two-step verification is required **every time** anyone logs in with an FSA ID.



Keep in mind that an individual could be a student or a parent.

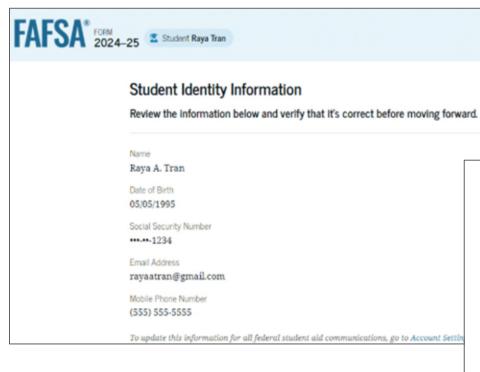






When the student starts the FAFSA first time, they'll see four onboarding pages with an accompanying video. The three other videos focus on contributors, what to expect, and what happens after submitting the FAFSA.





To make updates individuals will need to go to

StudentAid.gov and click on
"Settings."

31 Milk St

City
Boston

State
MA

Zip Code
02126

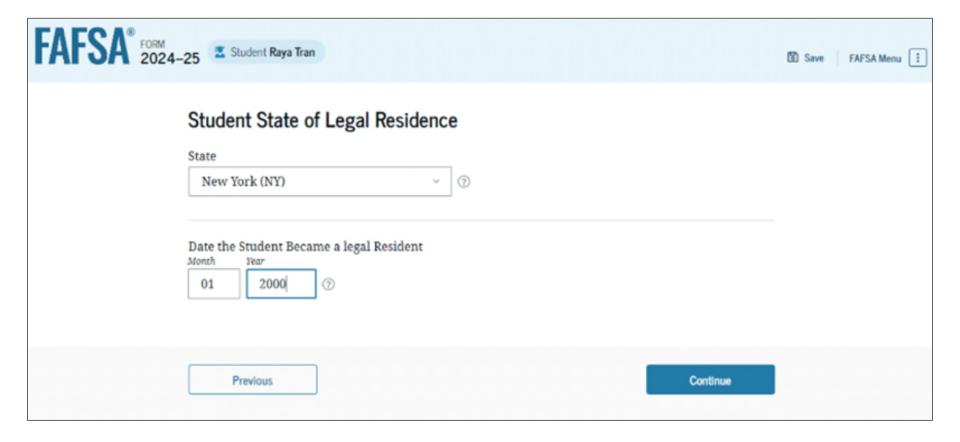
Country ③

Permanent Mailing Address

United States (US)

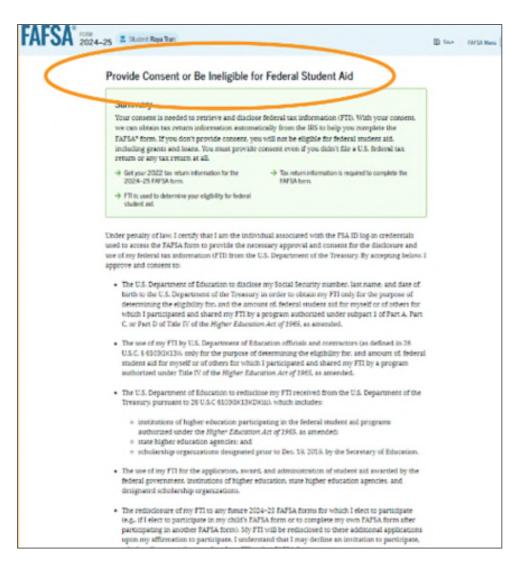
Include apartment number.





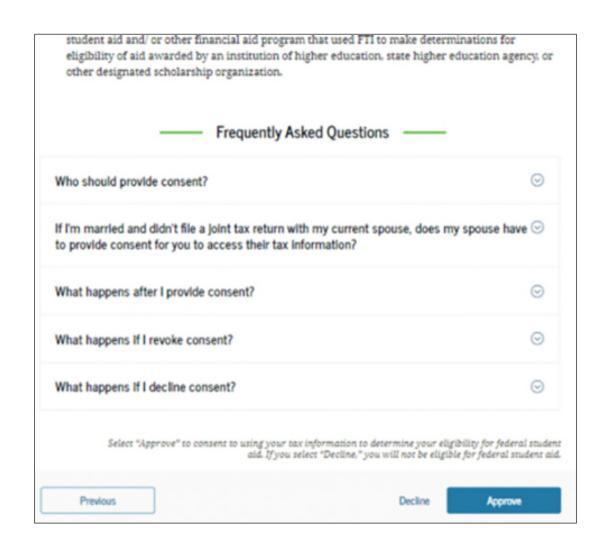


- This page informs the student about consent and their federal tax information.
- By providing consent, the student's federal tax information is transferred directly into the FAFSA from the IRS to help complete the Student Financials section.
- This page is very long!



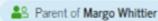


- This is the bottom of the same page.
- FAQs with more information.
- The student selects "Approve" to provide consent and is taken to the next page.









Student Personal Circumstances

We'll ask you questions that help us determine the student's eligibility for federal student aid. This information can affect the types of federal student aid they're eligible to receive.

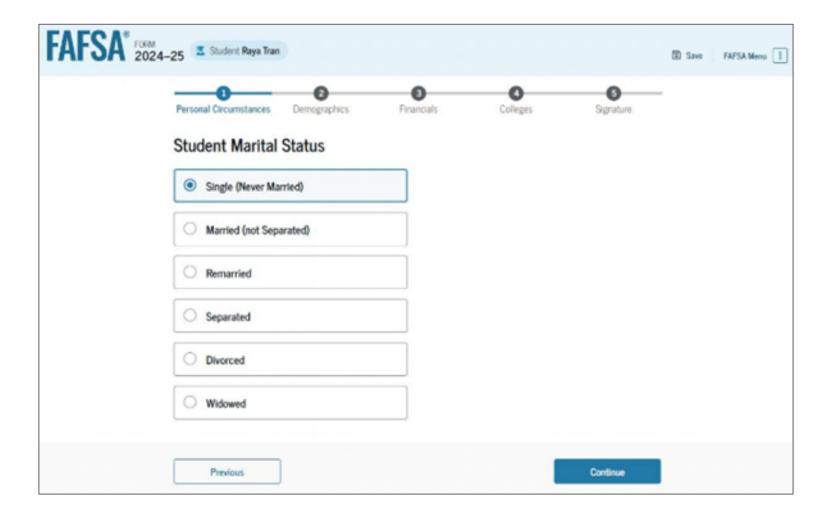
> Sometimes we need to collect information from other people after we review the student's answers. We'll let you know if this is the case.



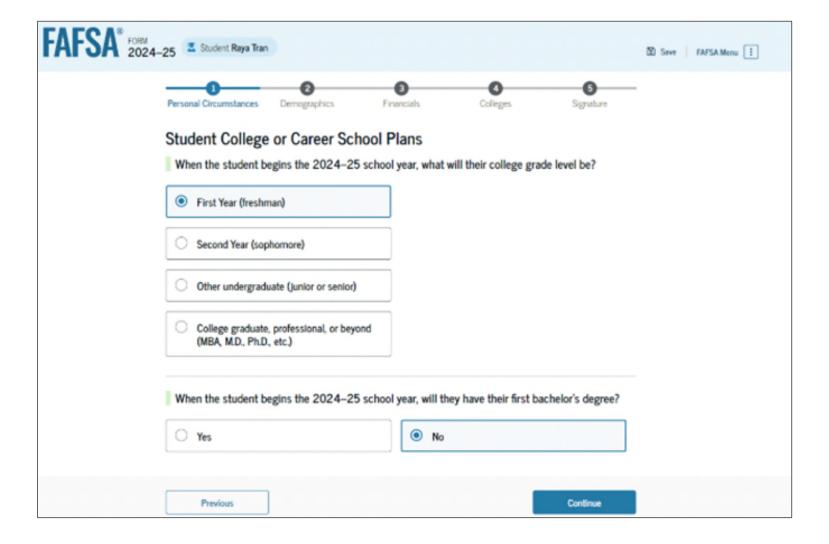
Previous

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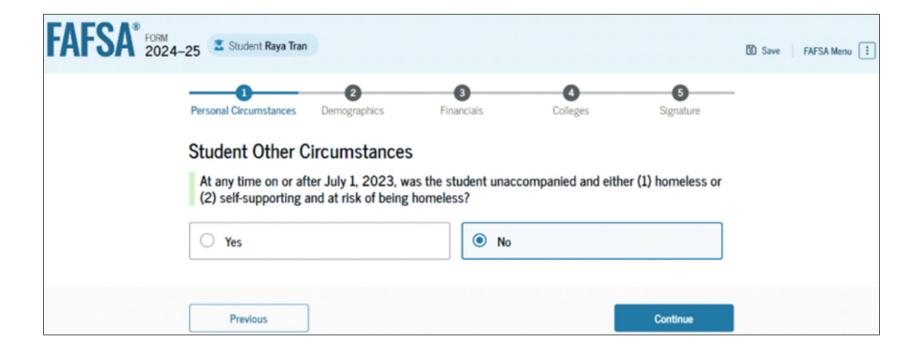




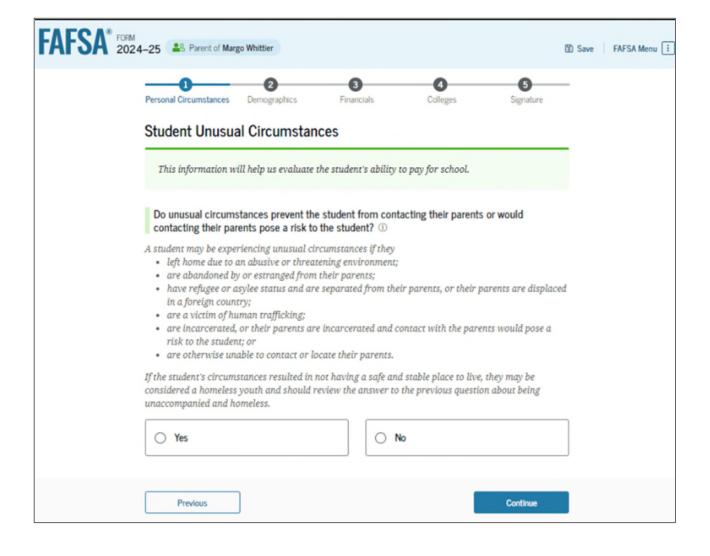


FAFSA [®] FORM 2024-	-25 as Parent of Margo Whittier	Save FAFSA Menu
	Personal Circumstances Demographics Financials Colleges Signature	
	Student Personal Circumstances Select all that apply.	
	The student is currently serving on active duty in the U.S. armed forces for purposes other than training.	0
	The student is a veteran of the U.S. armed forces.	0
	The student has children or other people (excluding their spouse) who live with them and receive more than half of their support from the student now and between July 1, 2024, and June 30, 2025.	0
	At any time since the student turned 13, they were an orphan (no living biological or adoptive parent).	\bigcirc
	At any time since the student turned 13, they were a ward of the court.	0
	At any time since the student turned 13, they were in foster care.	0
	The student is or was a legally emancipated minor, as determined by a court in their state of residence.	0
	The student is or was in a legal guardianship with someone other than their parent or stepparent, as determined by a court in their state of residence.	0
	None of these apply.	
	Previous Continue	

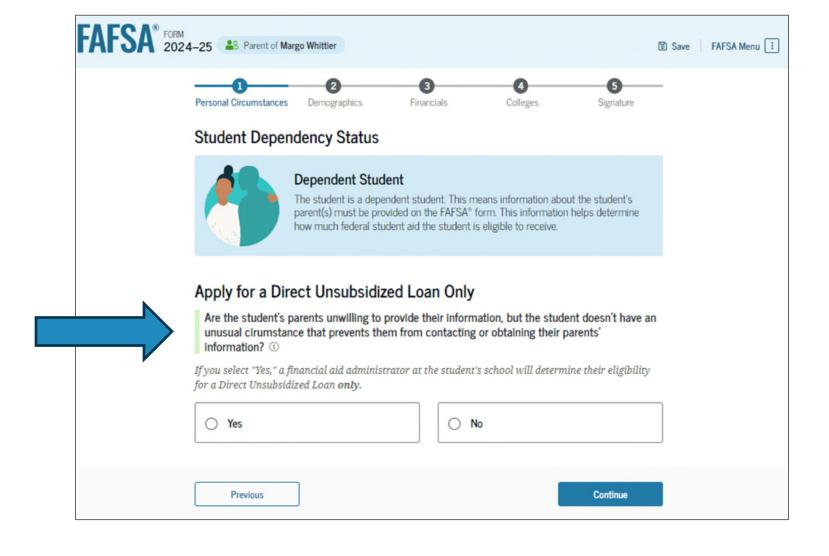




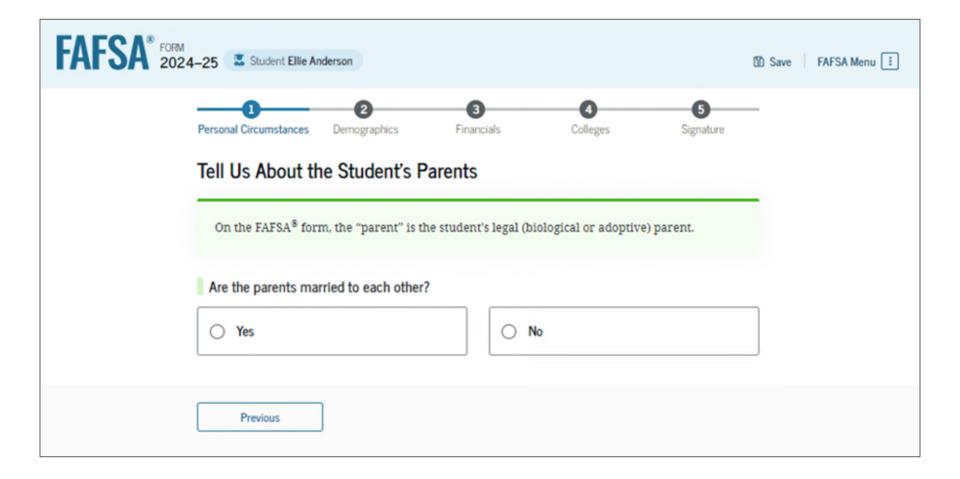




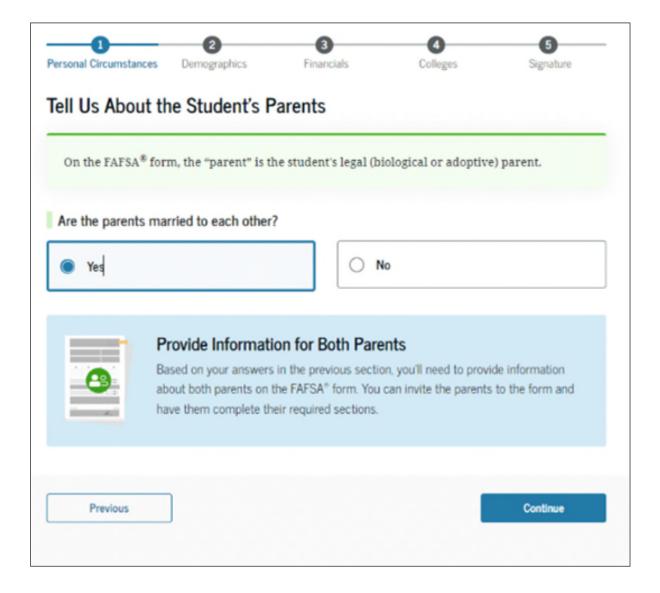


















- Parent invite must match legal name, date of birth, and SSN.
- The email address provided for contributors does not need to match the one used for the FSA ID.

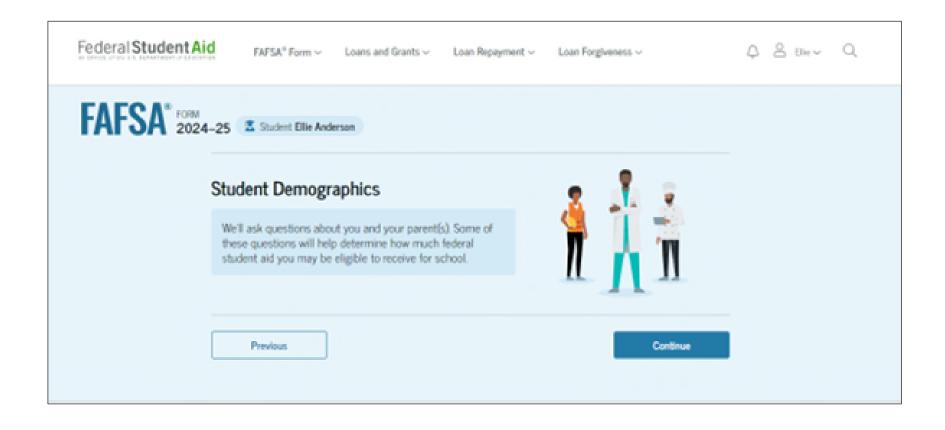
Month Day Year	Month Day Year	
Social Security Number (SSN) ③	Social Security Number (SSN) ③	
My parent doesn't have an SSN.	My parent doesn't have an SSN.	
Email Address ①	Email Address ③	
Confirm Email Address ③	Confirm Email Address ⑦	
Send Invite	Send Invite	



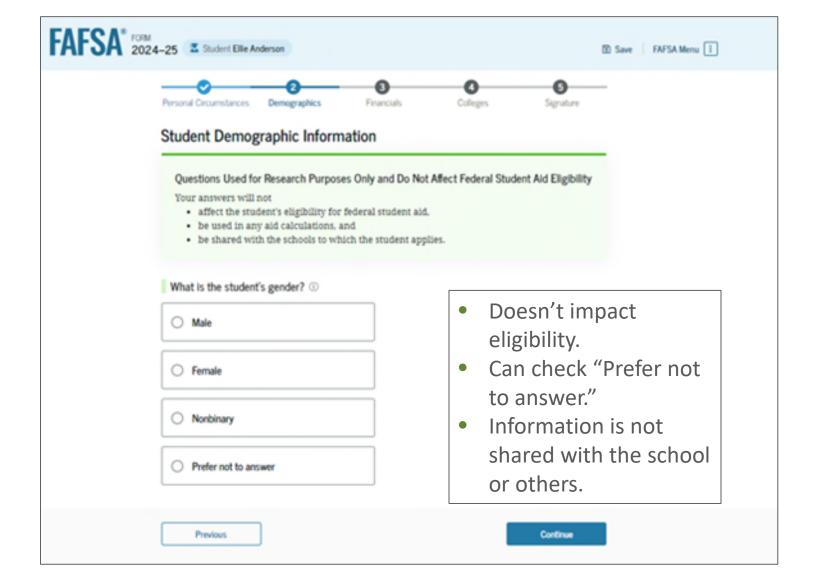
- It's believed this is being recommend to limit confusion resulting from both parents getting an invite to complete.
 The majority of married couples file a joint return.
- If information for another parent is needed, it can be required later.

Invite Parent(s) to This FAFSA® Form We Need Information for One of Your Parents Now Based on your answers in the previous section, you'll need to provide information. about both of your parents on your FAFSA form. This does not make them financially responsible for your education. Right now, you should only invite one of your parents. Enter information about one of your parents identified on the prior page, and we'll send an email on your behalf. We highly recommend you only complete the "Parent Who Will Fill Out This Form" box. Only the email address does not need to match. Parent Who Will Fill Out This Form Parent Spouse or Partner Do not fill out this section unless otherwise instructed First Name ① Invite Sent to Rebecca Anderson Last Name ① Date of Birth (7) Social Security Number (SSN) ③ My parent doesn't have an SSN. Email Address ® Confirm Email Address @ Send Invite Previous

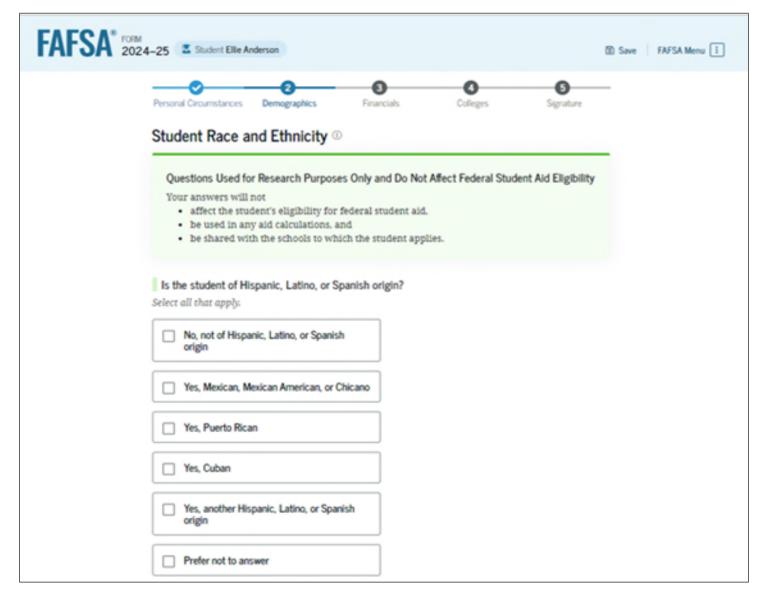




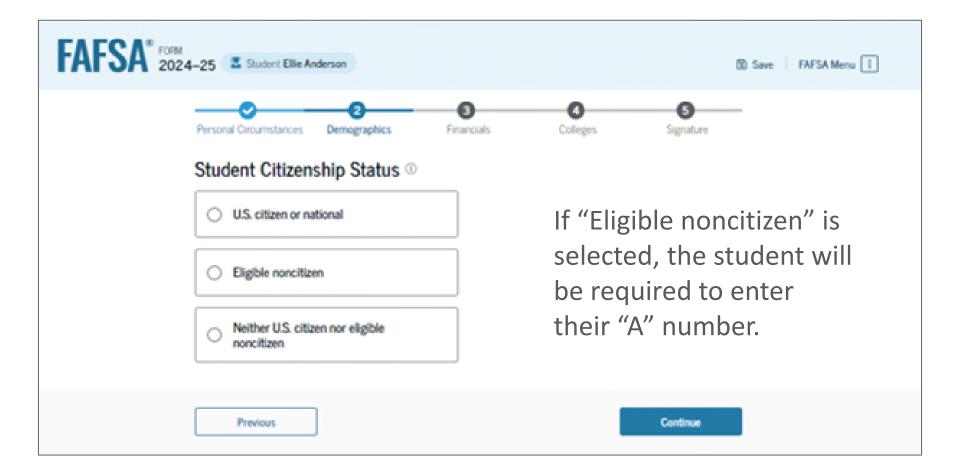




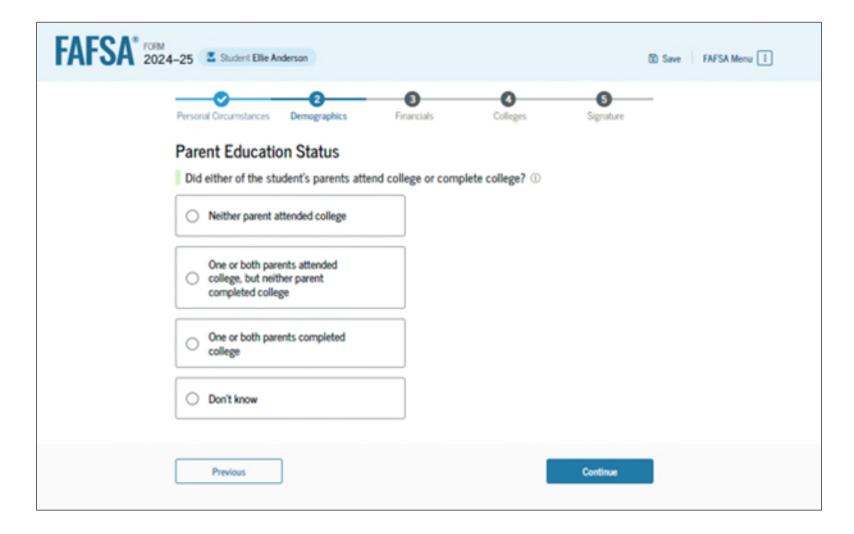




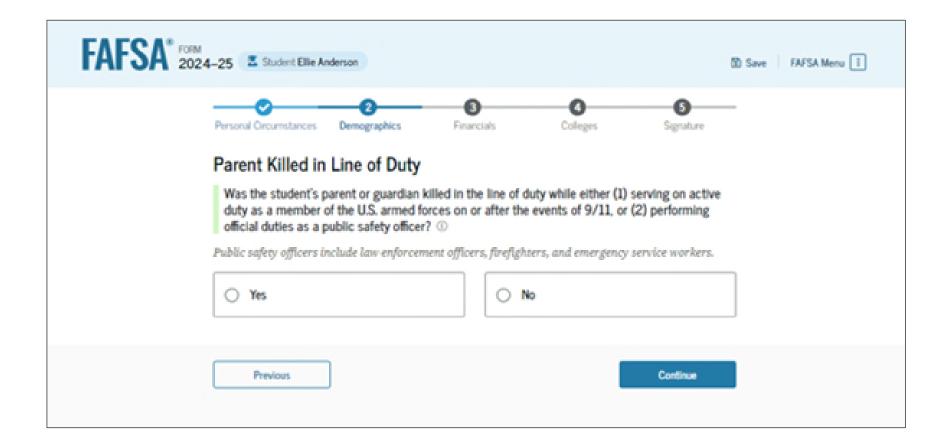




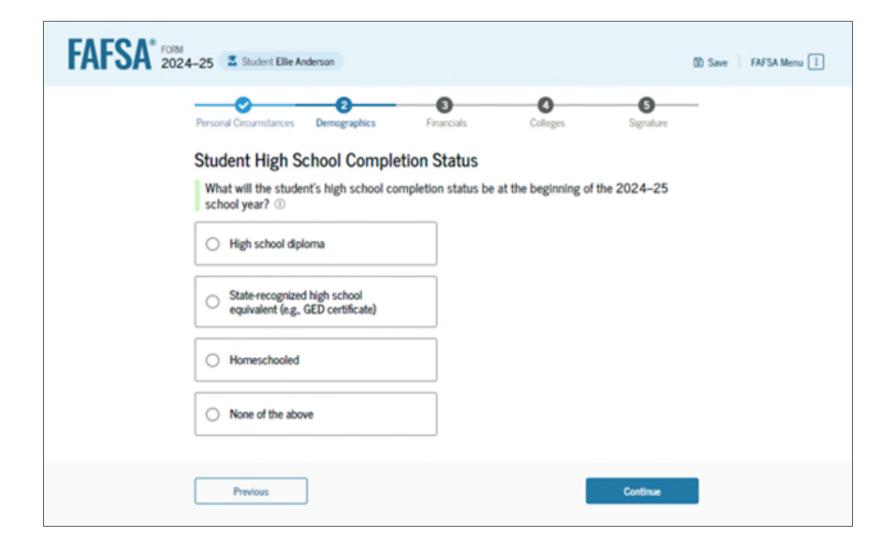




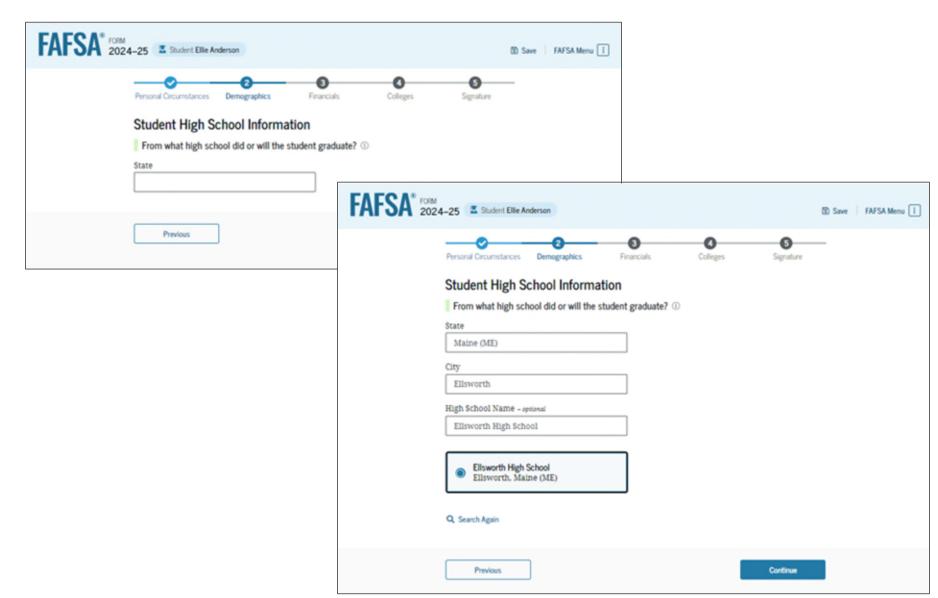




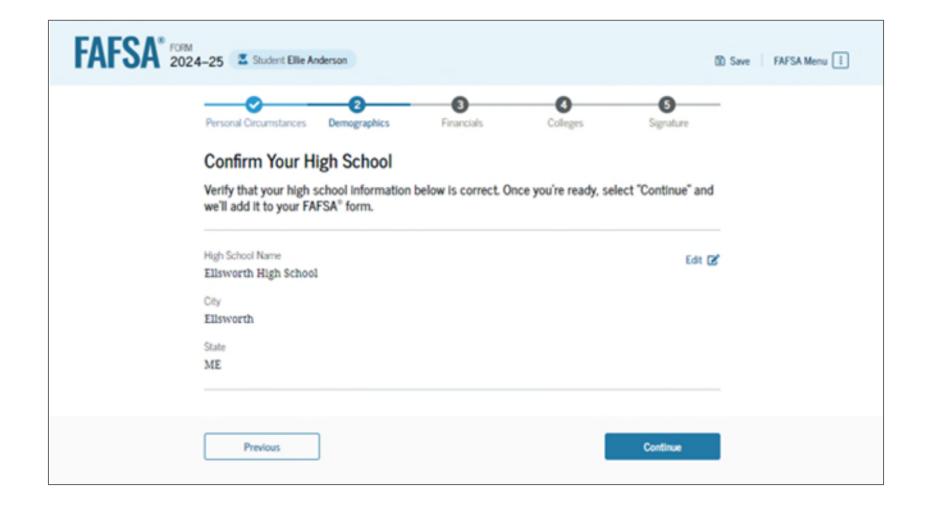




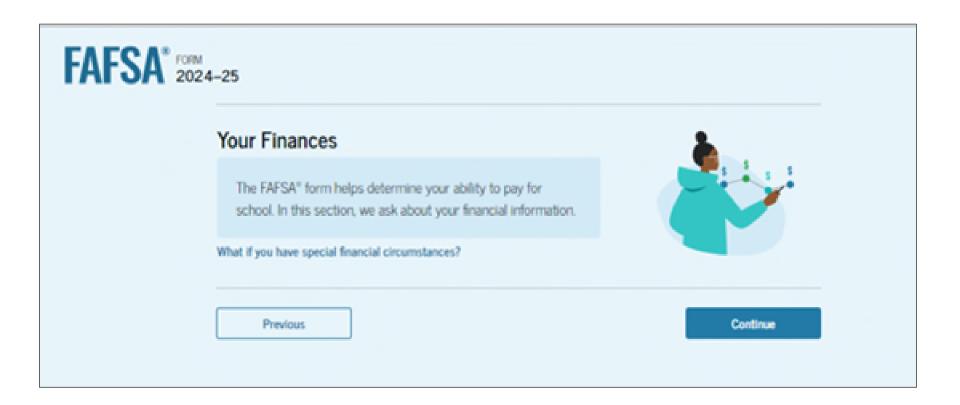






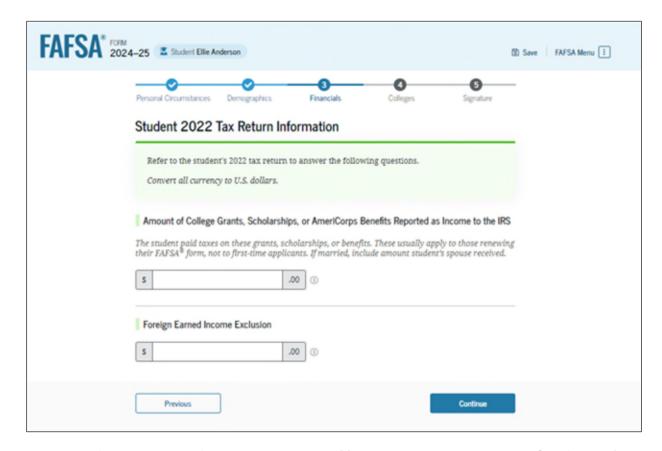








- Student tax filers only will see these two questions.
- Earnings from work will not be asked, even for non-tax filers.
- If FSA ID not authenticated, tax info will have to be entered manually.



Students and parents will never see any federal tax information that was shared by the Direct Data Exchange (DDX) in the FAFSA or on the FAFSA Submission Summary.





Your Finances

The FAFSA® form helps determine your ability to pay for school. In this section, we ask about your financial information.



What if you have special financial circumstances?



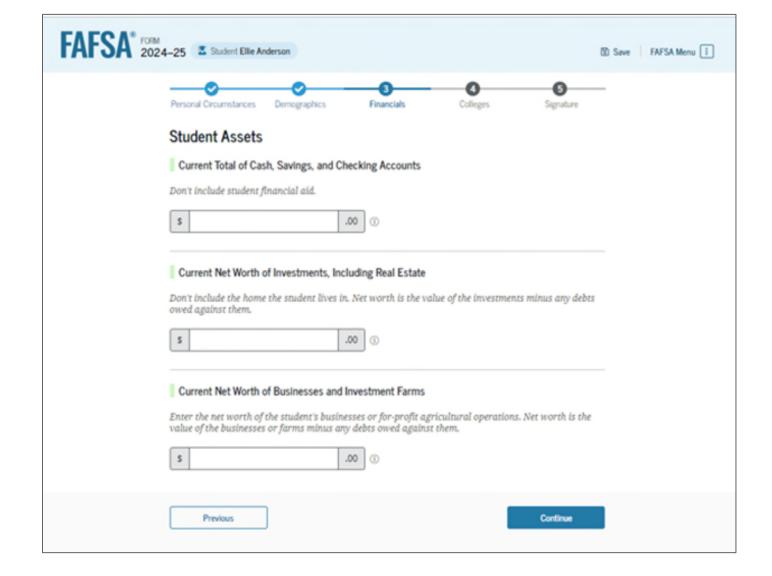
We Recommend That You Return Later to Complete This Section

Once your FSA ID is fully matched, we may be able to prepopulate more of your data and save you time completing the $FAFSA^{\otimes}$ form.

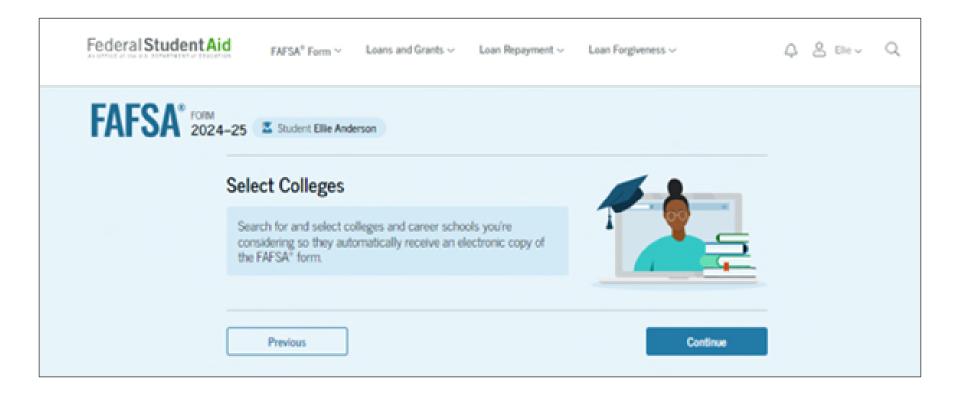
Previous

Continue

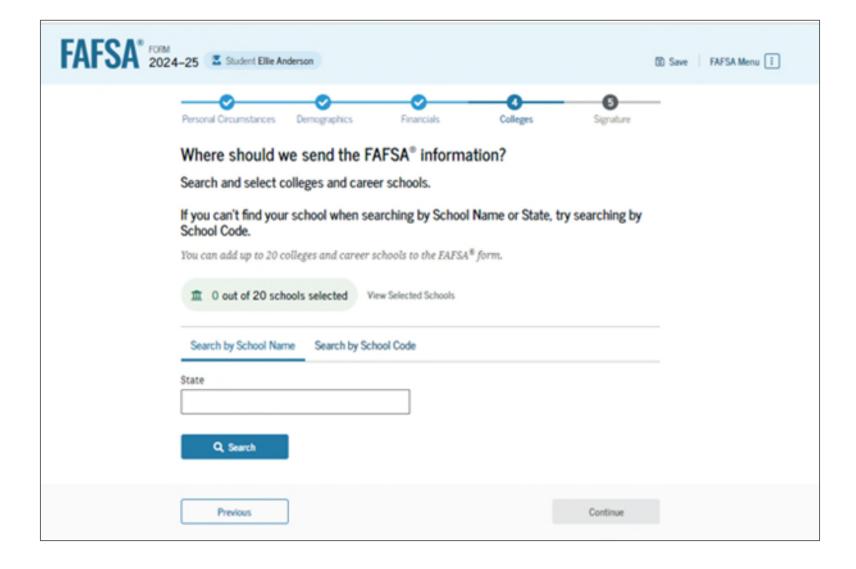




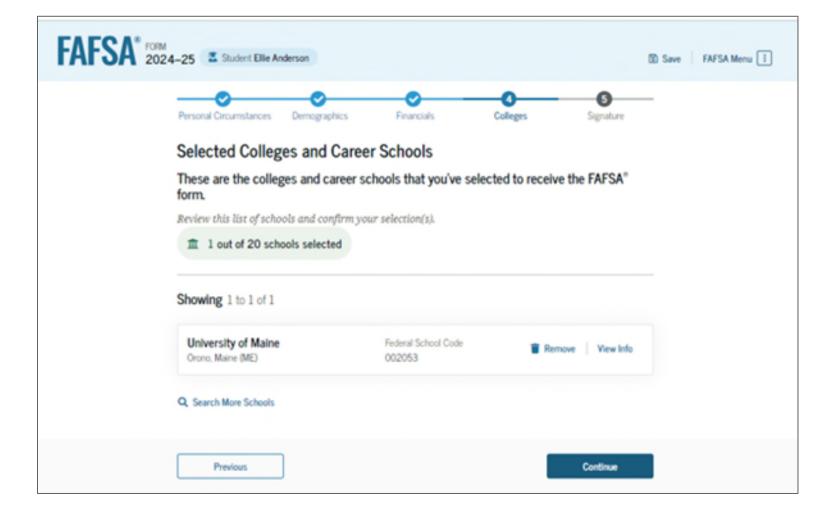






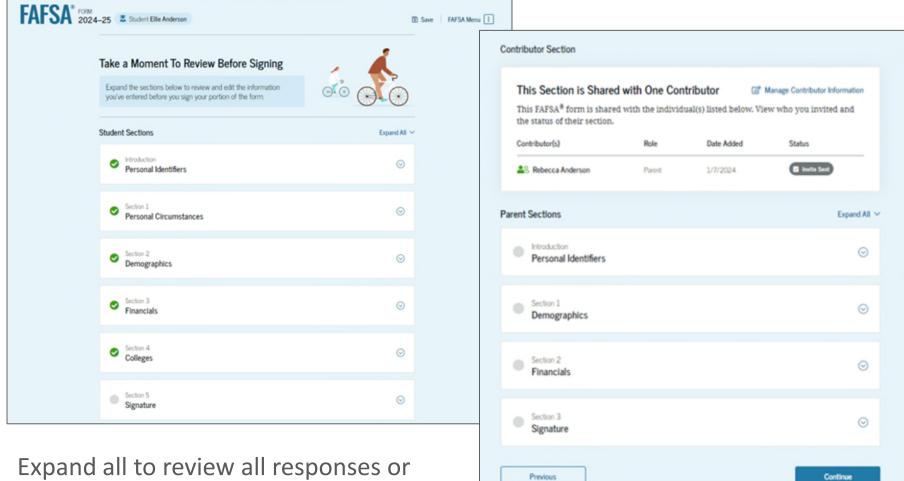






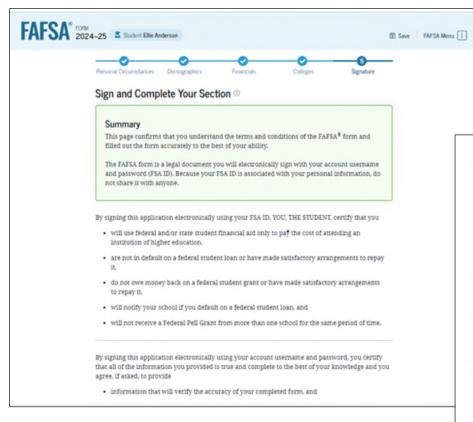
Housing plans question has been removed.





expand all to review all responses or expand each section individually. Click on question hyperlink to be taken to that page.





Student can sign but option to submit won't exist until all sections are complete.

By signing this application electronically using your account username and password, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide

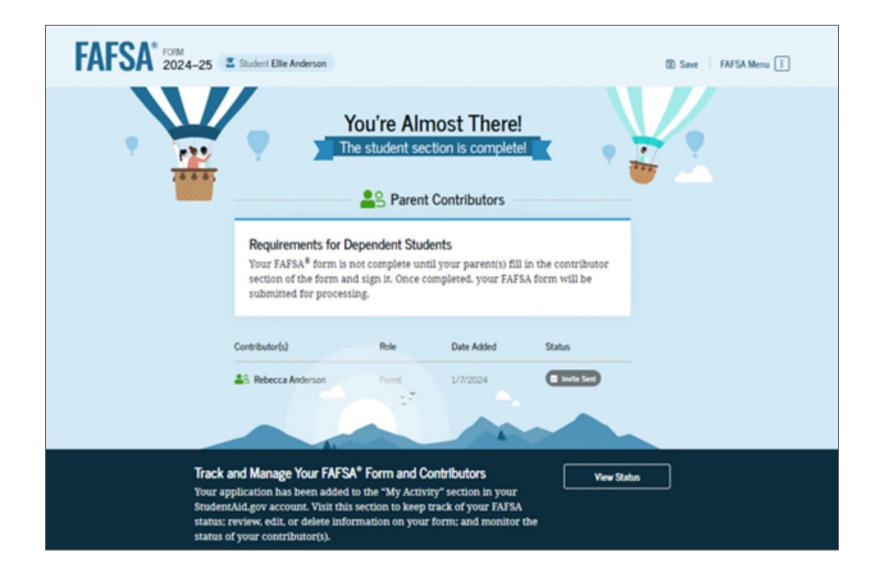
- · information that will verify the accuracy of your completed form, and
- . U.S. or foreign income tax forms that you filed or are required to file.

You also certify that you understand that the secretary of education has the authority to verify information reported on your application.

If you sign this application or any document related to the federal student aid programs electronically using a username and password, and/or any other credential, you certify that you are the person identified by the username and password, and/or any other credential and have not disclosed that username and password, and/or any other credential to anyone else. If you purposefully give false or misleading information, including applying as an independent student without meeting the unusual circumstances required to qualify for such a status, you may be subject to criminal penalties under 20 U.S.C. 1097, which may include a fine up to \$20,000, imprisonment, or both.

I, Ellie Ar	nderson, agree to the terms o	itlined above.
-------------	-------------------------------	----------------







- This is the bottom half of the submission screen.
- Information about the FAFSA
 Submission
 Summary timing and location availability is provided.
- Not recommended but note the link at the bottom.

Here's What You Can Do Next



Check Your Email

You will receive an email version of this page at the following email address: ellie.anderson1114@gmail.com.



Your FAFSA® Form Still Needs Contributor Information

The contributor(s) you selected will receive an email invitation to join your form.

Things You Should Know



View Your FAFSA" Submission Summary

Once your application is complete and submitted, check the status of your form beginning in late January by logging into your StudentAid.gov account and selecting your FAFSA submission from the My Activity section of your account Dashboard. Look for an email at the end of January to learn when your FAFSA information has been sent to your selected schools.



Questions About Your Eligibility

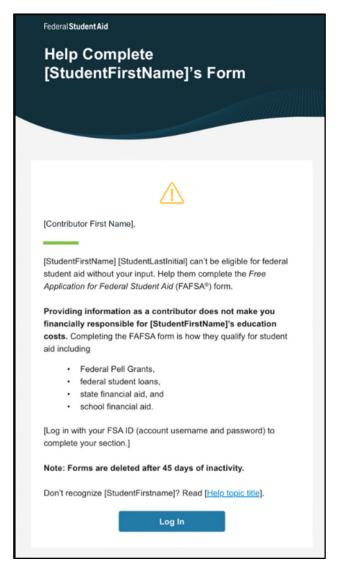
Visit the "FAFSA Help" page for more information.

Get Help

We strongly recommend that your parent(s) complete their own section. If that isn't possible, you can manually provide their information, but you will not be eligible for federal student aid, including grants and loans, until they provide consent and approval, and sign the form.

Provide Parent Information Manually

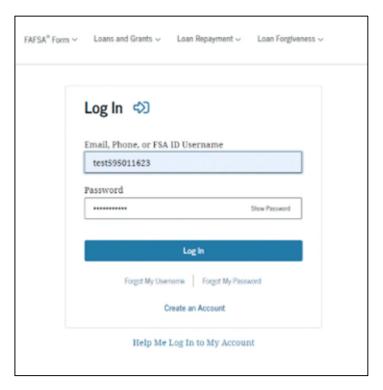




Click on
"Log In" link
in email
OR
go to
Student
Aid.gov and

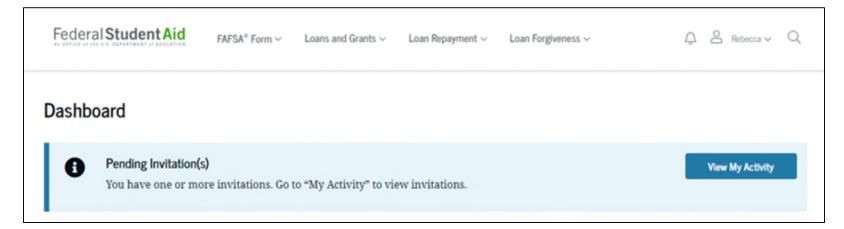
log in with

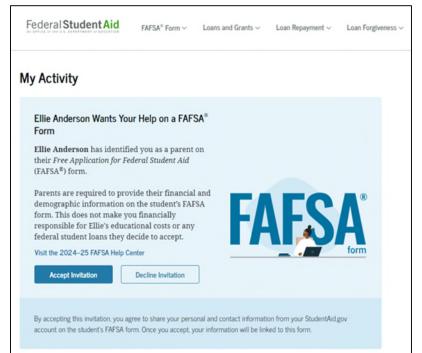
FSA ID



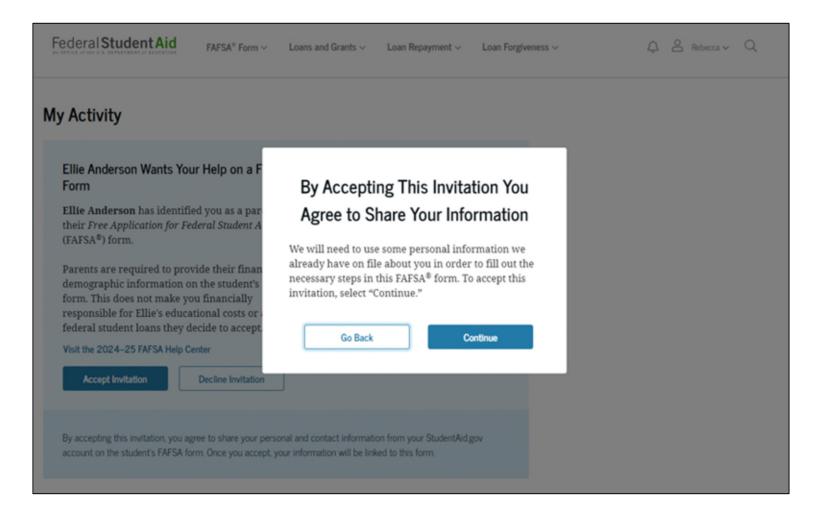
- Reminders will be sent 7 and 14 days.
- Incomplete FAFSA with no activity for 45 days will be deleted.











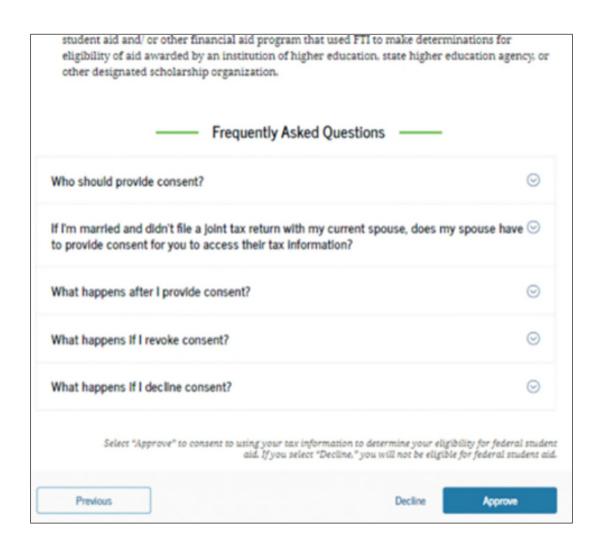


- This page informs the parent about consent and their federal tax information.
- By providing consent, the parents' federal tax information is transferred directly into the FAFSA from the IRS to help complete the Parent Financials section.

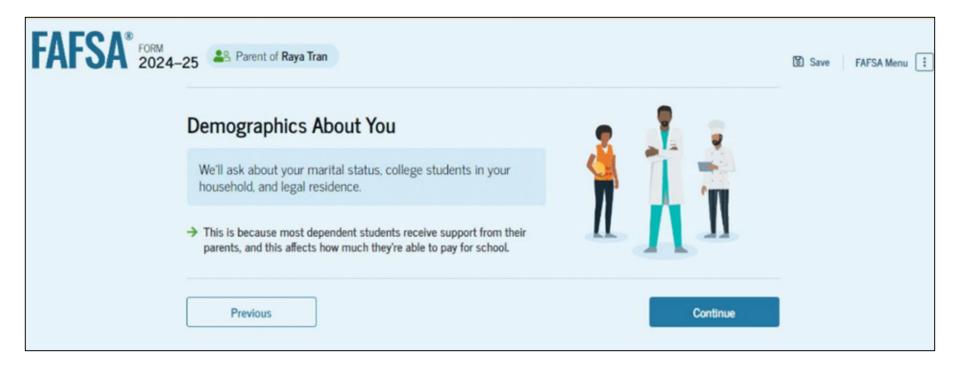




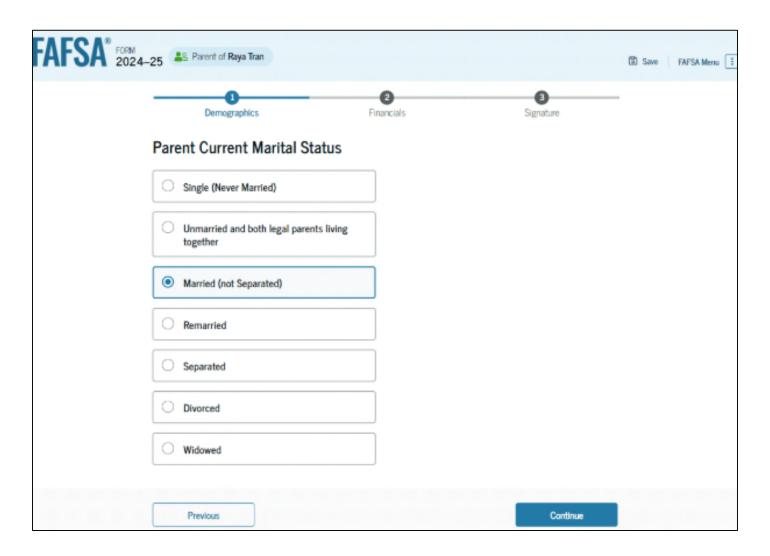
- This is the bottom of the same page.
- FAQs with more information.
- The parent selects "Approve" to provide consent and is taken to the next page.



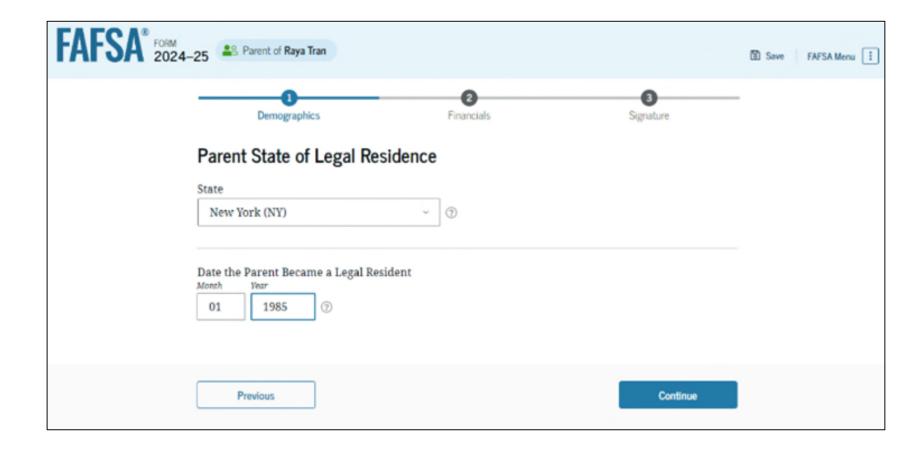




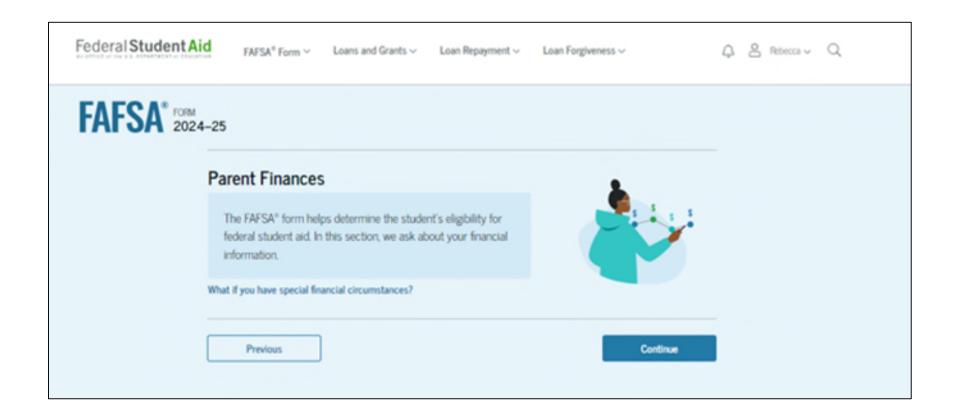




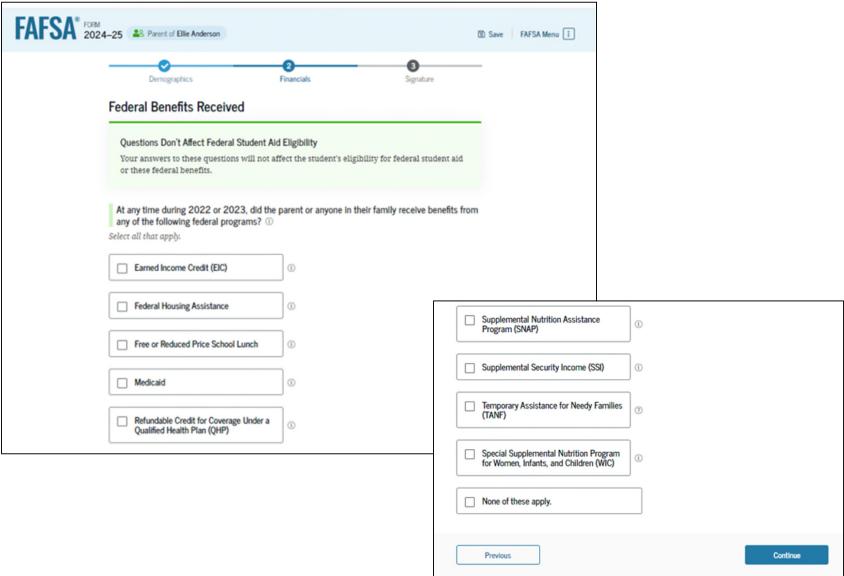




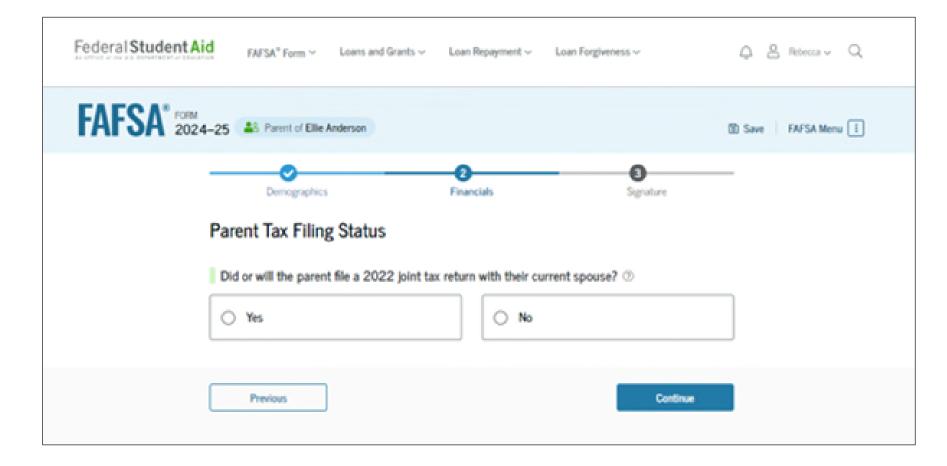




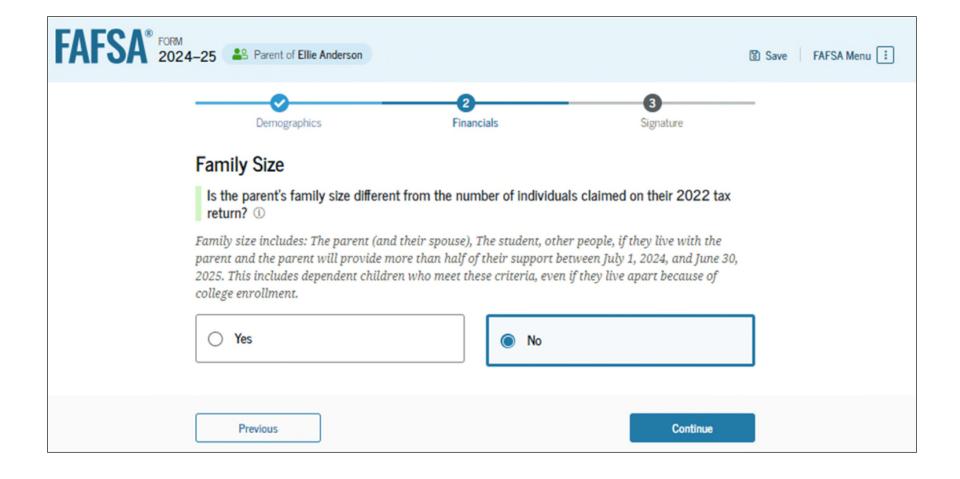






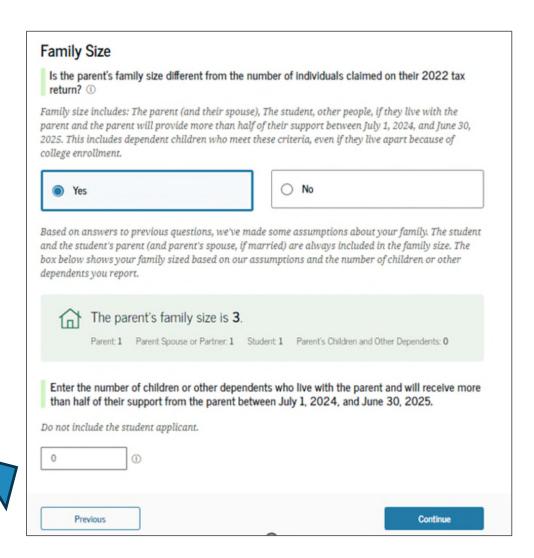




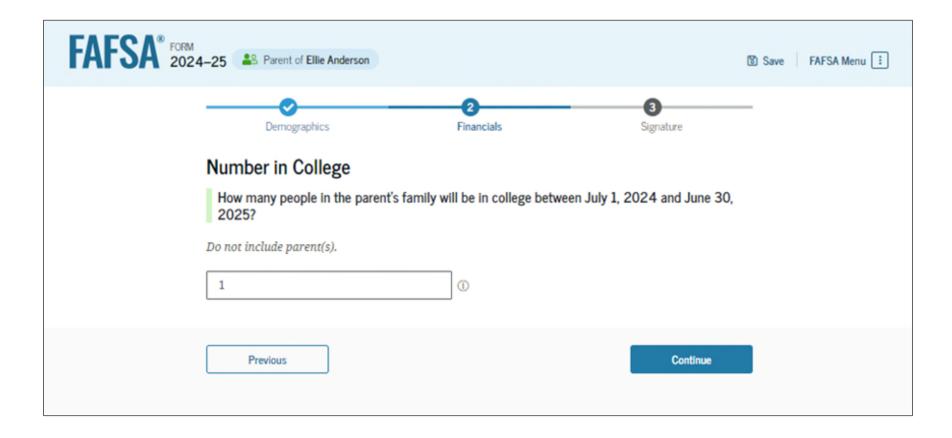




- Enter the number of children or other dependents who live with the parents and will receive more than half of their support from the parent between July 1, 2024 and June 30, 2025.
- Do not include the student applicant.

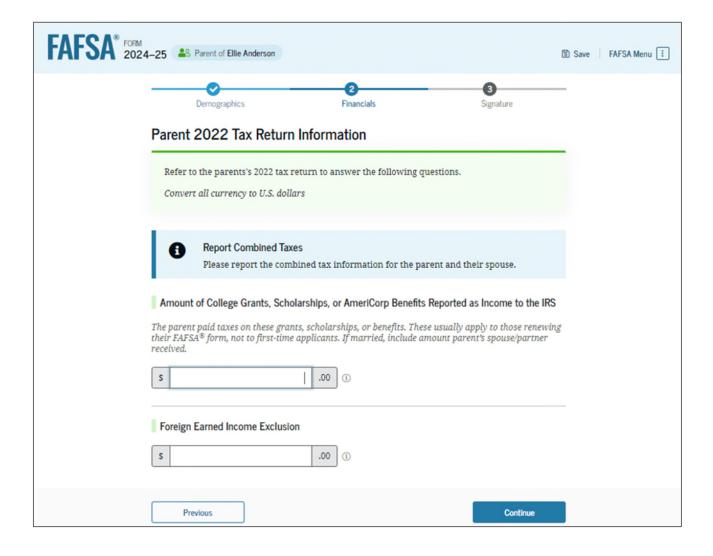




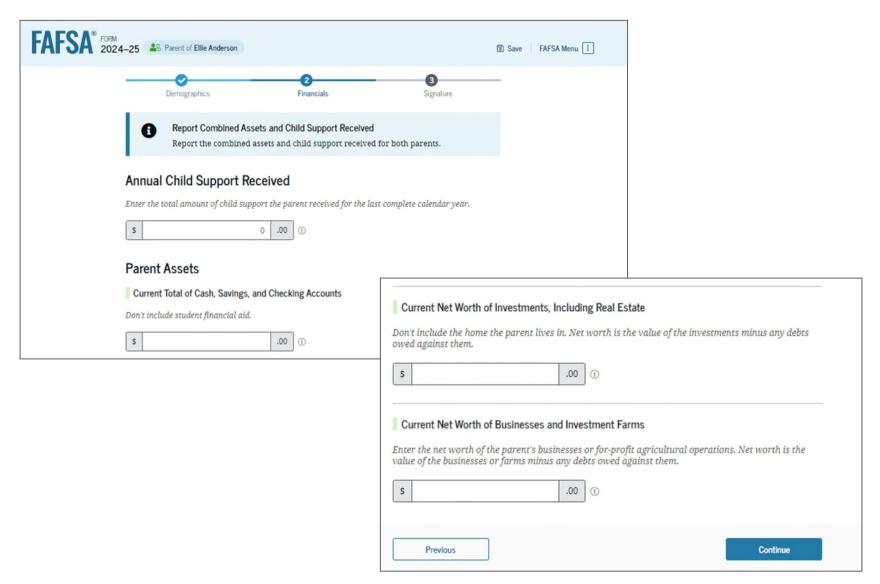




Manual pathway will appear when tax filing status doesn't reflect current marital status.









- When parents are married, demographic information for the parent's spouse or partner (student's other biological parent) is required.
- Tax filing status will determine whether "other" parent needs to sign in with their own FSA ID.

Parent Spouse's or Partner's Information Enter the following information about your spouse and we'll send an email on your behalf. If they already have a StudentAid.gov account username and password (FSA ID), the information entered here must exactly match that account. Parent Spouse or Partner First Name ① Last Name ① Date of Birth (?) Month Social Security Number (SSN) ③

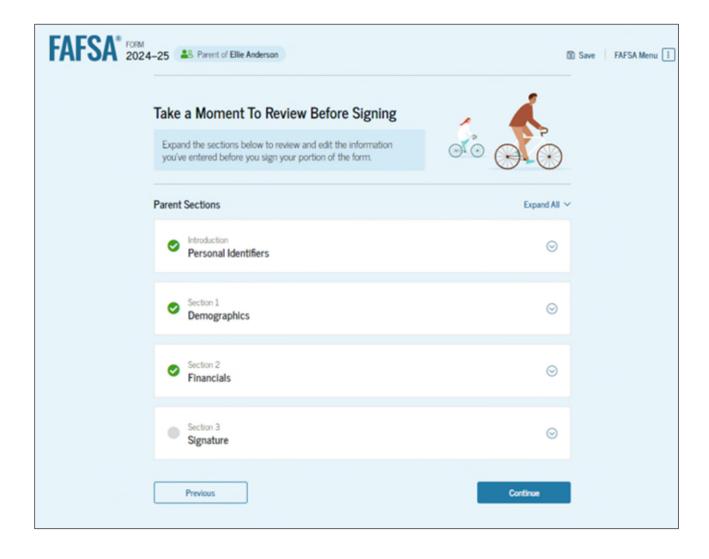
Email Address ②

Confirm Email Address ②

Previous Continue

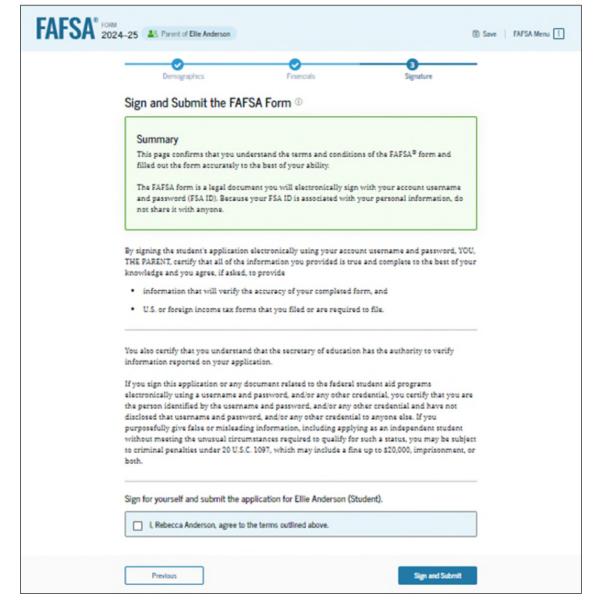


In this scenario parents can only review their questions, not the students.



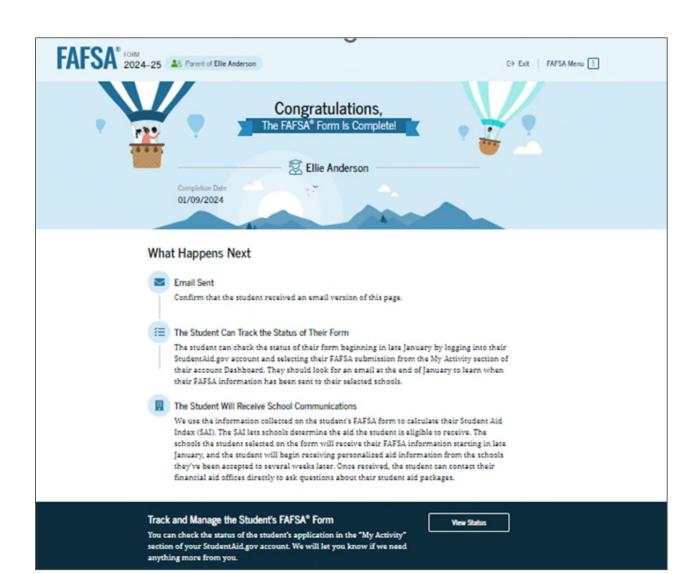


The last contributor to complete their section will have the opportunity to submit the FAFSA.





- When parent submits the FAFSA, they will see a congratulations page with limited information.
- Student will receive email confirmation with estimated SAI.





Email is from the U.S.

Department of Education with a subject line of "We Received Your FAFSA Form"

We received your Free Application for Federal Student Aid (FAFSA®) form.

Submission date: January 09, 2024

Date Release Number (DRN): 9525

Note: Keep your DRN private. Read about the Data Release Number for more information.

Estimated Student Aid Index (SAI) = 13108

The SAI is **not** a measure of how much student aid you'll receive or how much you'll pay for college. Schools use your SAI to determine your federal student aid eligibility.

Based on the <u>eligibility criteria</u>, you don't appear to be eligible for a <u>Federal Pell Grant</u>. However, you may be eligible for other federal, state, or institutional grants; scholarships; and/or work study



Dependent Student Parent Starts the FAFSA



Filing the FAFSA

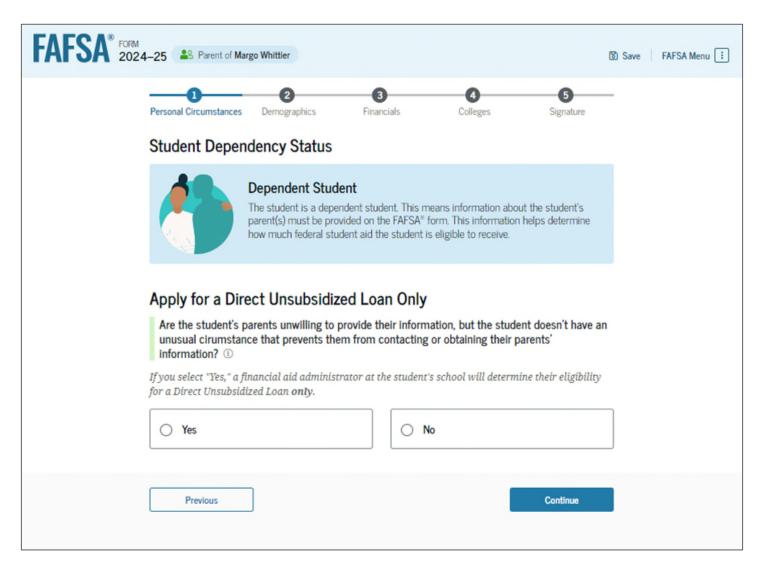
If Parent starts the FAFSA they will:

- provide student identifying information (results in invite being sent)
- see the onboarding screens; and
- answer questions that determine dependency:
 - Onboarding screens
 - Student personal circumstances
 - Student other circumstances (homelessness)
 - Student unusual circumstances

These questions determine student dependency status.



Filing the FAFSA



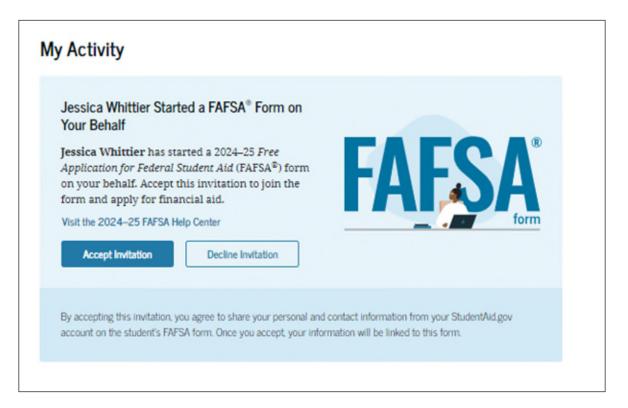


Next, Parent will see the following sections:

- Review parent identity
- Consent and approval
- Demographics
- Parent Financials
- Parent spouse info (if applicable)
- Review and sign

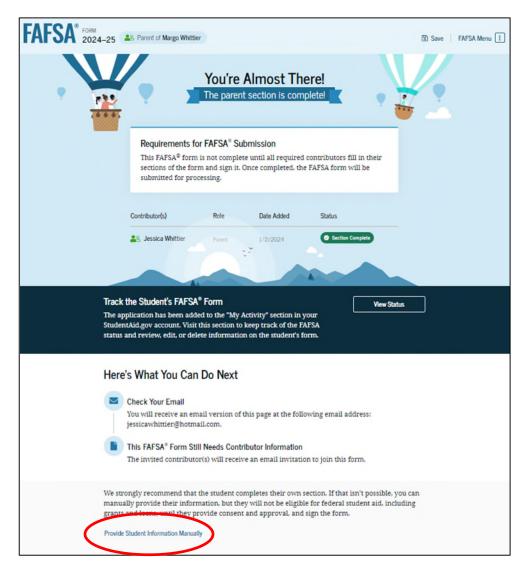


Student will receive the email invitation with link, *or* can go directly to **StudentAid.gov** and log in with FSA ID.





If Parent wants to complete as much of the form as possible, they can answer remaining student questions by clicking on this link on the parent confirmation screen (no student FSA ID needed).





Regardless of who is completing, the following sections must be completed:

- **Demographic** information (including gender, ethnicity, citizenship, student high school, etc.)
- Student financials (will need to be entered manually if parent is completing via confirmation page link)
- Colleges list all colleges they are considering (up to 20 colleges can be added)
- **STUDENT must** log in with FSA ID at some point to provide consent and sign.



A submitted FAFSA will show a status of "In Review" until FAFSAs are processed

My Activity View All Activity >

2024-25 FAFSA® Form

1 In Review

Last Updated on 01/03/2024

2024–25 FAFSA® Form: Parent Contributor



Last Updated on 01/14/2024





Other Scenarios



Independent Students

- Will see all questions that a dependent student sees.
- Will need to answer the following questions in the Independent Student Financials section:
 - Family size
 - Number in college

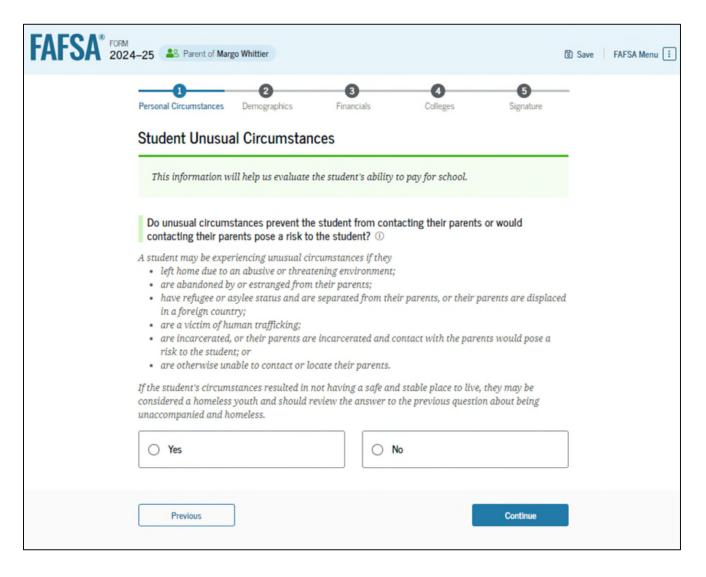
If married:

- Student will need to invite spouse if they didn't file a joint tax return in 2022.
- If joint tax return was filed in 2022, student will need to provide spouse's demographic information, but spouse will not need to sign in with FSA ID.



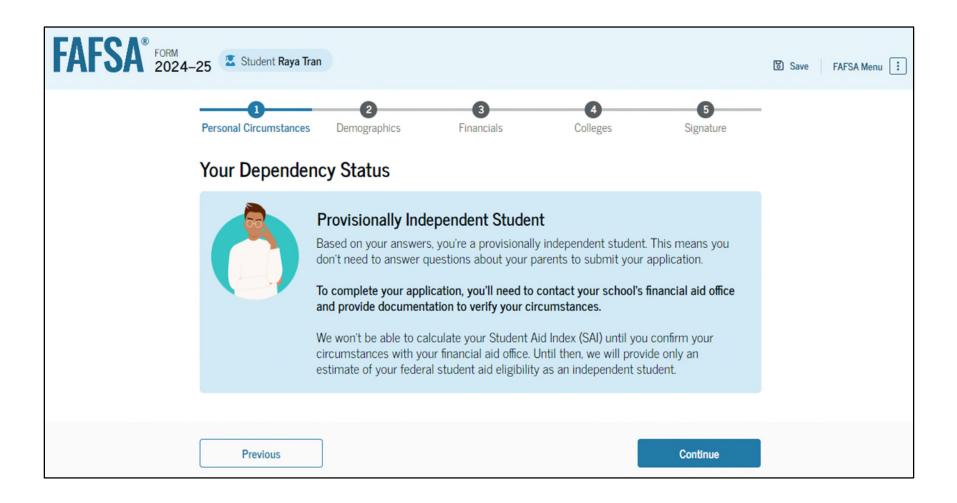


Unusual Circumstances

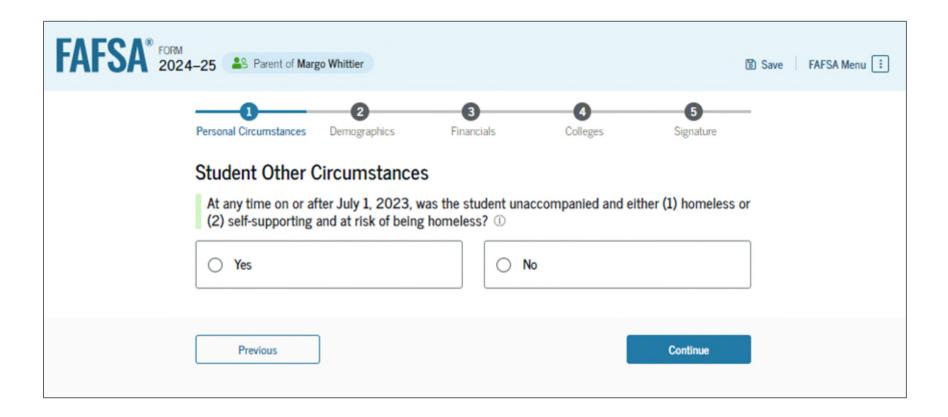




Unusual Circumstances

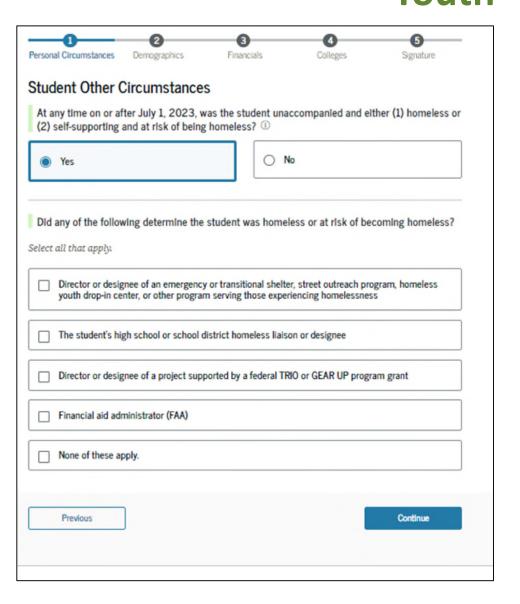






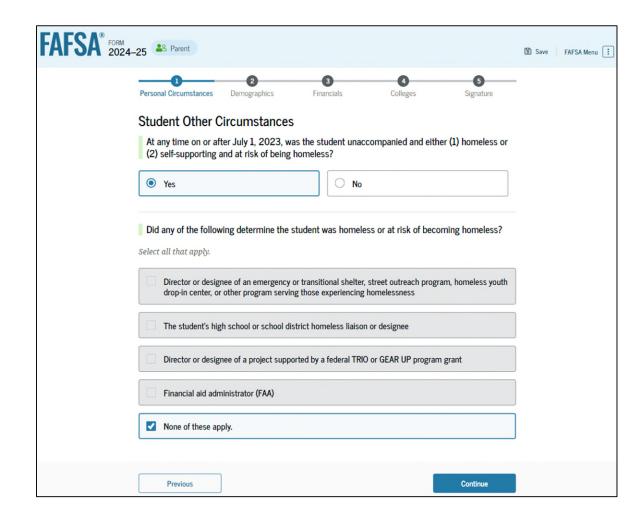


If the answer is yes and it can be documented by one of the following, the student is considered independent.

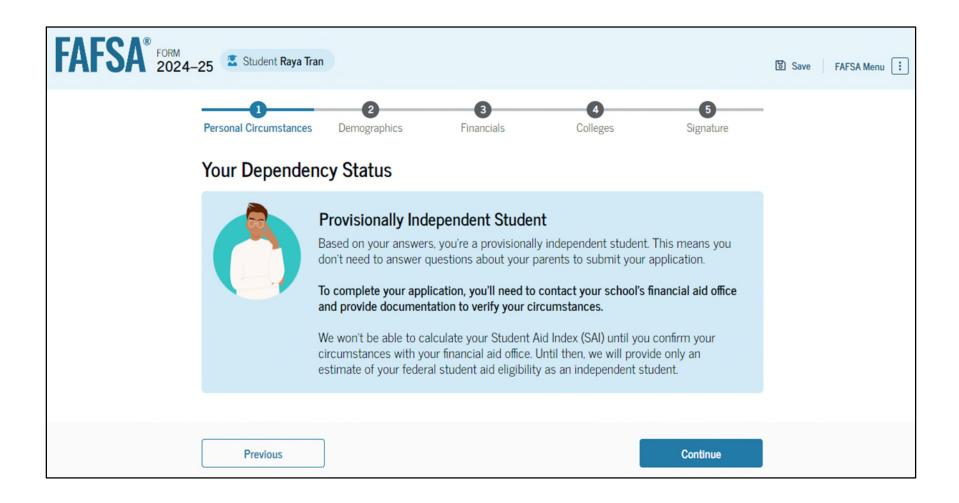




If student meets the criteria but none of the following can document, the student is considered "Provisionally independent."









If manual path is required, the following questions must be answered.



Income Earned From Work s .00	
Tax Exempt Interest Income s	
Untaxed Portions of IRA Distributions s	
Untaxed Portions of Pensions s .00	
Adjusted Gross Income s .00	
Income Tax Paid s .00	
□ Did the student receive the Earned Income Credit (EIC)? ○ Yes	



Student View After Submission



Loans and Grants V

Loan Repayment ∨

Loan Forgiveness ∨

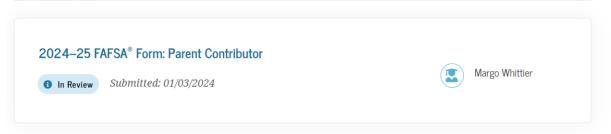




△ Sessica ✓

My Activity

Open

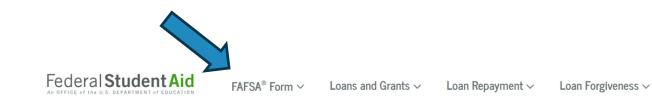


Closed





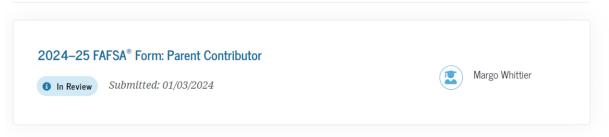
Parent View After Submission



△ S Jessica V Q

My Activity

Open



Closed





Questions?



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