FAFSA
(Free Application for Federal Student Aid)
Completion

Agenda

» Create an FSA ID
» FAFSA Completion
   » Common Mistakes
   » Tips
» Next Steps
Create an FSA ID

Who needs an FSA ID?

- Student
- One Parent; if student must provide parent information

Go to FSAID.ED.GOV

Create Your FSA ID (Username and password)

E-mail:
- Optional but strongly recommended
- Each FSA ID must have a unique e-mail address (you and your parent cannot use the same e-mail address)
- You must have access to this e-mail account

Username:
- Don’t include personal info such as date of birth or name
- If you see a message “Username taken, create a different username” then someone has already used that username
Provide Personal Information

- Make sure your Social Security number, date of birth, and name match what's on your Social Security card
- You must have a Social Security number to create an FSA ID.

Provide Profile Information

- Confirm information you entered previously and provide additional information
- Make sure your information is correct; any errors could result in a delay or problem in your receiving financial aid (or the repayment of your federal student loans)
Select/Create Challenge Questions and Answers

Answering your challenge questions is one way to unlock your account or reset your username and password.

**Questions 1 and 2:**
- Select a question from the dropdown menu and then enter your answer.

**Questions 3 and 4:**
- Make up your own question and enter your answer.
- Make sure the answers will be easy to remember.
- Examples of questions:
  - What’s your favorite color?
  - What’s your favorite food?

**Question 5:**
- Enter a significant date.
- It can’t be your date of birth.
- Examples of dates:
  - Favorite holiday
  - Sibling or parent date of birth.

Review Info and Agree to Terms

- Review and confirm your information.
- If you need to make a correction, use the “Previous” button.
- Review and agree to the terms and conditions for using your FSA ID.
Verify Your E-mail

E-mail Verification Page

- If you provided an e-mail address, then you will be taken to the E-mail Verification page.
- Once you verify your e-mail, you can use your e-mail address as your username when logging into Department of Education websites.
- You can also continue without verifying.

How to Verify Your E-mail

- Do not close the E-mail Verification page.
- We’ll send you an e-mail with a secure code.
- Log in to your e-mail account using a different tab or browser window or another device.
- Look for an e-mail with the subject line, “Important: Your FSA ID E-mail Validation - Action Required.”
- The e-mail will include a six-digit, numeric code that you will enter in the “Secure Code” data field.

E-mail With Your Secure Code

Your FSA ID is created!

Your FSA ID was created.

Using Your FSA ID

- You can log in to fafsa.gov and complete, sign, and submit a new (original) FAFSA.
- If you didn’t provide or link to a PIN, then your info will be sent to the Social Security Administration for confirmation.
- SSA review will take 1-3 days.
- Until your info is verified, you won’t be able to take certain actions, such as correct your FAFSA, submit a renewal FAFSA, or sign a Master Promissory Note.
Starting to think about college?

- Compare colleges using the College Scorecard
- Get financial aid guidance at StudentAid.gov
- Estimate your federal aid using FAFSA®-coaster

Login

Federal Student Aid | FAFSA.gov

Log in to the FAFSA

Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the same key that the student made. Help for parents.

- [ ] I am the student
- [ ] I am a parent, guardian, or student from a Tribe/Native American

NEXT
When “I am the student” is selected

When “I am the parent” is selected
Dependent Student with Parental Data

Only students may use their FSA ID to login. Parents can start a FAFSA for a student by entering the student’s identifiers.

Start Student's 2018-2019 FAFSA

Create a Save Key.
The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key
Student Education

**STUDENT INFORMATION**

What will your high school completion status be when you begin college in the 2018-2019 school year?

- High school diploma

What will your college grade level be when you begin the 2018-2019 school year?

- 2nd yr./sophomore

What degree or certificate will you be working on when you begin the 2018-2019 school year?

- 1st bachelor's degree

Will you have your first bachelor's degree before you begin the 2018-2019 school year?

- Yes
- No

Student and Parent Education Completion

**STUDENT INFORMATION**

Are you interested in being considered for work-study?

- Yes
- No
- Don't know

Are you a foster youth or were you at any time in the foster care system?

- Yes
- No

Highest school completed by Parent 1

- Middle School/Jr. High

Highest school completed by Parent 2

- High School
Application was successfully saved.

Because the FAFSA belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.

Enter the name, city, and state of your high school, then click Search.

What is the name of your high school?
ST PIUS X HIGH SCHOOL

In what city is your high school located?
HOUSTON

In what state is your high school located?
Texas

Were you born before January 1, 1995?
☐ Yes ☐ No

As of today, are you married?
☐ Yes ☐ No

At the beginning of the 2018-2019 school year, will you be working on a master’s or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?
☐ Yes ☐ No
### Does Student Have Dependents?

**STUDENT INFORMATION**

Do you now have or will you have children who will receive more than half of their support from you between July 1, 2018 and June 30, 2019?
- Yes
- No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2019?
- Yes
- No

### Student Additional Dependency Questions

**STUDENT INFORMATION**

Answer the following questions to determine if you are required to provide information about your parents on your FAFSA. Check all that apply or check None of the above.

- Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
- Are you a veteran of the U.S. Armed Forces?
- 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?
- As determined by a court in your state of legal residence, are you or were you an emancipated minor?
- Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?
- None of the above
Student Homelessness Filter Question

On or after July 1, 2017, were you homeless or were you self-supporting and at risk of being homeless?  

- Yes  
- No

Dependent Student

Based on your answers to the dependency status questions, you are considered a dependent student. This means you must provide parental information. Select “I will provide information about my parent(s)” and click Next to continue filling out your FAFSA.

If you have a special circumstance and are unable to provide parental information, under very limited circumstances, you may be able to submit your FAFSA without parental information. Select “I am unable to provide information about my parent(s)” and click Next to get additional information.

- I will provide information about my parent(s)  
- I am unable to provide information about my parent(s)
Application was successfully saved.

Because the FAFSA belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.

As of today, what is the marital status of your parents?
- Married or Remarried

When did your parents get married or remarried?
- 01/1990

Enter information for first parent (father/mother/stepparent):
- Parent's Social Security Number
- Parent's last name
- Student
- Parent's first initial
- D
- Parent's date of birth:
  - 12/30/1963
Enter Information for your other parent (father/mother/stepparent)

Parent’s Social Security Number
000-00-0000

Parent’s last name
Student

Parent’s first initial
M

Parent’s date of birth
02/22/1960

Parent Household Info

Household Size

Your parents
2

Yourself, even if you do not live with your parents
1

Your parent’s other children even if they do not live with your parent(s):

1. Your parents will provide more than half of their support from July 1, 2018 through June 30, 2019 or
   a. These children can answer “No” to every Dependency Status question on the FAFSA

2. Other people if:
   a. They now live with your parents,
   b. Your parents provide more than half of their support, and
   c. Your parents will continue to provide more than half of their support from July 1, 2018 through June 30, 2019

0

Your parent’s number of family members in 2018-2019 (household size)
4

Number in College

How many people in your parent’s household (as reported above) will be college students between July 1, 2018 and June 30, 2019? Do not include your parents.
2
Parent Tax Filing Status

**PARENT INFORMATION**

Application was successfully saved.

**Attention!** You must provide financial information from your parents' 2016 tax return on the following pages.

For 2016, have your parents completed their IRS income tax return or another tax return?
- [ ] Already completed

For 2016, what is your parents' tax filing status according to their tax return?
- [ ] Married-Filing Joint Return

Did your parents file a Puerto Rican or foreign tax return for 2016?
- [ ] Yes
- [ ] No

**IRS Data Retrieval Tool**

Applying is faster and easier if your parents transfer their tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT).

[LINK TO IRS DRT]

Parent Log In to IRS DRT

**PARENT INFORMATION**

You, the parent, should enter the information below and click Next to continue. Otherwise, click Skip IRS DRT.

If you have any questions or problems using this tool, click FAFSA Help for assistance.

- **Parent's FSA ID Username or Verified E-mail Address**

[ ]

Forgot Username | Create an FSA ID

- **Parent's FSA ID Password**

[ ]

Forgot Password

[SKIP IRS DRT] [NEXT]
Parent Leaving FAFSA

Leaving FAFSA on the Web
You have entered answers to one or more income questions. FAFSA on the Web will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA.

You, the parent, are now leaving FAFSA on the Web and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to FAFSA on the Web from the IRS Web site. If you do not transfer your information or choose not to return to FAFSA on the Web from the IRS Web site, you will have to log in to open your saved FAFSA.

For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.

Get My Federal Income Tax Information

Enter the following information from your 2016 Federal Income Tax Return.

First Name *
Last Name *
Social Security Number *
Date of Birth *
Filing Status *
Address * Must match your tax return.
Street Address *
P.O. Box (Required)
Apt. Number (Required)
City, Town or Post Office *
State/U.S. Territory *
ZIP Code *

Enter the following information from your 2016 Federal Income Tax Return.

First Name *
Last Name *
Social Security Number *
Date of Birth *
Filing Status *
Address * Must match your tax return.
Street Address *
P.O. Box (Required)
Apt. Number (Required)
City, Town or Post Office *
State/U.S. Territory *
ZIP Code *

Message from webpage

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAIX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7211A and 26 U.S.C. 7441).

OK
You have successfully transferred 2016 IRS tax information.

The father's IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with “Transferred from the IRS.” For your protection, IRS tax return information is not displayed on the FAFSA.

What type of income tax return did your father file for 2016?
- Transferred from the IRS

What was your father's adjusted gross income for 2016?
- Transferred from the IRS

How much did your father earn from working (wages, salaries, tips, etc.) in 2016?
- Transferred from the IRS

Did your father file an IRS Schedule K-1 (Form 1065) for 2016?
- Yes  - No
Parent Additional IRS Info

Parent Information

Enter the amount of your father's income tax for 2016.
Transferred from the IRS

Enter your father's exemptions for 2016.
Transferred from the IRS

Parent Questions for Tax Filers Only

Did your father have any of the following items in 2016? Enter amounts for all that apply.

- Combat pay or special combat pay. Only enter the amount that was taxable and included in your father's adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q
- Student college grant and scholarship aid reported to the IRS in your father's income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships
- Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form
- IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form
- Tax-exempt interest income from IRS Form
- Did the untaxed portions of IRA distributions your father reported for 2016 include rollovers?
  - Yes
  - No
- Did the untaxed portions of pensions your father reported for 2016 include rollovers?
Student Tax Filing Status

Application was successfully saved.

Because the FAFSA belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.

Attention! You must provide financial information from your 2016 tax return on the following pages.

For 2016, have you completed your IRS income tax return or another tax return?
- Already completed

For 2016, what is your tax filing status according to your tax return?
- Single

Did you file a Puerto Rican or foreign tax return for 2016?
- Yes
- No

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT).

LINK TO IRS DRT

FAFSA Summary

You're not done yet! You still need to submit your FAFSA. After you print this page, click Next to return to your FAFSA form.

2018-2019 FAFSA SUMMARY
Student ID XXXX-XX-6113 DE

Expand All

- Student Demographics
- School Selection
- Dependency Status
- Parent Demographics
- Financial Information
- Sign & Submit
Both you and a parent need to sign your FAFSA.

Only sign for yourself. If you and your parent are not together, one of you can sign, save the application and then exit. Give the “save key” to the other person who can log in with it and sign and submit the FAFSA.

Be sure not to mix up your and your parent’s FSA IDs when signing.

**Student Signature Needed**

Signature Status: Unsigned

[Provide Student Signature]

**Parent Signature Needed**

Signature Status: Unsigned

[Provide Parent Signature]

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**Agreement of Terms**

**STUDENT INFORMATION**

READ BEFORE PROCEEDING

By signing this application electronically using your FSA ID (username and password) and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education;
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it;
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it;
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same period of time.

By signing this application electronically using your username and password, and/or any other credential or by...
A parent must sign the FAFSA. If you are a parent, click Provide Parent Signature to sign your child’s FAFSA.

Note: If you are the student and your parent is not present, click Save and then Exit. Your parent should log in to fafsa.gov using the student's identifiers and the “save key” to sign and submit your FAFSA.
You have provided all necessary signatures. Click Submit My FAFSA Now to submit your FAFSA.

**Student Signature Complete**
Social Security Number: XXX-XX-1140  
Last Name: AUTUMNALE  
Date of Birth: 01/25/1999  
Signature Status: Signed Electronically

**Parent Signature Complete**
Social Security Number: XXX-XX-8595  
Last Name: ShadBush  
Date of Birth: 07/30/1987  
Signature Status: Signed Electronically

**Signature Options**

- **Parent Signature for**
  Social Security Number: XXX-XX-0089  
  Last Name: DOUGLAS  
  Date of Birth: 03/08/1964

**Other Options to Sign and Submit**

- **Sign Electronically With My FSA ID**  
  This is the fastest option. Selecting this option will return you to the question “What is your (the parent’s) FSA ID?”.

- **Print A Signature Page**  
  This option requires that you print and mail your signature.

- **Submit Without Signatures**  
  This option allows you to submit this FAFSA now without your signature, but you will need to return later to sign.
You have chosen to submit your FAFSA without all required signatures. If you continue, your application will not be complete.

Your FAFSA must be signed before your school can determine your eligibility for federal student aid. The fastest way to sign a FAFSA is electronically using an FSA ID. Click choose another way to sign below to sign with an FSA ID. Click here for help signing with your FSA ID.

To submit without signature(s), click Submit My FAFSA Now.

Student Selected Signature Option
- Social Security Number: XXX-XX-6123
- Last Name: Dependent
- Date of Birth: 02/09/1999
- Signature Status: Submit Without Signatures
  - choose another way to sign

Parent Selected Signature Option
- Social Security Number: XXX-XX-4644
- Last Name: Student
- Date of Birth: 12/30/1983
- Signature Status: Submit Without Signatures
  - choose another way to sign

2018-2019 Confirmation Page

Congratulations, Student!
Your FAFSA was successfully submitted to Federal Student Aid.

Confirmation Number: F 13300003004 08/22/2018 14:07:01
Data Release Number (DRN): 3815

What Happens Next
- You will receive an e-mail version of this page.
- In 3-5 business days, you will receive an e-mail notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

An abbreviated version of your confirmation page has been sent to you at the e-mail address: stu@stu.com

PRINT THIS PAGE
Common Mistakes

- Leaving Blank Fields; enter a ‘0’ or ‘not applicable’ instead
- Using commas or decimals; round to the nearest dollar
- Using the wrong Social Security Number (SSN)
  - If parent does not have a SSN, use 000-00-0000
  - If does not have a SSN and from the Republic of the Marshall Islands, the Federated States of Micronesia, or the Republic of Palau, enter “666” for the first three digits of their SSN and the processor will assign them a number.
    - Must indicate the state of legal residence as one of the above
    - Must use the same number for future years.
- Does not use the name as it appears on the Social Security Card
- Students think that their parents are their “Legal Guardians”

Common Mistakes (cont)

- Does not use the IRS Data Retrieval or changing the amounts after it was successfully transferred.
- Using the wrong federal income tax paid; use the amount on the tax return not what was withheld on the W-2 form
- Not using the correct marital status; use the marital status as of the day the FAFSA is completed
- Not registering for Selective Service; males aged 18-26 must register
- Not listing a School Code
- Not signing
Next Steps

- Once the FAFSA is processed, you will receive notification that it is processed and to review the Student Aid Report (SAR)
  - Review SAR to ensure there are no mistakes
- If filed an amended tax return, have a copy of the 1040X (Amended Tax Return) or request for a copy of the IRS Record of Account Transcript AND request for a copy of the IRS Tax Transcript.
- If did not use the IRS Data Retrieval, request for a copy of the IRS Tax Transcript
- If did not file a tax return, request for a Verification of Non-filing letter from the IRS

Questions???

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