# **2526 FAFSA**

# State College of Florida

# FSA ID Walkthrough

Students and parents can create their Federal Student Aid account, or FSA ID, now (which is recommended)

Parents without a Social Security Number will be able to create an FSA ID and electronically sign the FAFSA.

Identity match requirement: It will take 1-3 business days to process a student's or parent's identity after creating an FSA ID a necessary step to successfully transfer tax information to the new FAFSA.



### There are 3 parts to the FAFSA





### Get Money To Help Pay for School

Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for financial aid for college, career school, or graduate school.

Start a 2025–26 FAFSA® Form

Start New Form

Edit a 2025–26 FAFSA® Form or Accept an Invitation

E

Edit Existing Forms



Need the 2024–25 FAFSA form?

Start New Form Edit Existing Forms

# **Spanish Option**



# Roles

- If the student or parent tries to start the FAFSA without logging in, the FAFSA will require them to log in with their FSA ID
- Any parent wishing to work on the electronic FAFSA form will be required to log in with an FSA ID



1 dill		
◯ Student	O Parent	<b>8</b> 9



Continue

# Log In

- If the person is not logged in, it will take them to this page
- If they don't have an FSA ID, they can select "Create an Account"

### Log In 🖒

Email, Phone, or FSA ID Username

raya.tran

#### Password

\*\*\*\*\*\*

Show Password

Log In

Forgot My Username

Forgot My Password

#### Create an Account

### Student, Parent, and Other Parent Provides Consent

- This page informs the student and parent(s) about consent and their federal tax information
- By providing consent, the student's federal tax information is transferred directly into the FAFSA form from the IRS to help complete the Student Financials section
- That direct transfer is called the **Direct Data** Exchange (DDX)



### Provide Consent and Approval or You Won't Be Eligible for Federal Student Aid

#### Demo Prototype

8

Selecting "Approve" demonstrates importing Federal Tax Information (FTI).

Selecting "Decline" demonstrates when FTI isn't imported, tax information must be entered manually, and assumes tax filing status as Single.

Both scenarios make these assumptions:

- Filed U.S. taxes and did not participate in a federal benefits program.
- Must provide information on assets, IRA rollover, and pension rollover.

#### Summary

Your consent and approval are needed to retrieve and disclose federal tax information. With your consent and approval, we can obtain tax return information automatically from the IRS to help you complete the FAFSA® form. If you don't provide consent and approval, you will not be eligible for federal student aid, including grants and loans. You must provide consent and approval even if you didn't file a U.S. federal tax return or any tax return.

→ Get your 2023 tax return information for the 2025–26 FAFSA form.

- → Tax return information is required to complete the FAFSA form.
- → Federal tax information is used to determine your eligibility for federal student aid.

### Student, Parent, and Other Parent Provides Consent

- This page informs the student and parent(s) about consent and their federal tax information
- By providing consent, the student's federal tax information is transferred directly into the FAFSA form from the IRS to help complete the Student Financials section
- That direct transfer is called the Direct Data Exchange (DDX)
- The student selects "Approve" to provide consent and is taken to the next page
- This consent agreement is nearly the same for the student as the parent

student aid and/ or other financial aid program that used FTI to make determinations for eligibility of aid awarded by an institution of higher education, state higher education agency, or other designated scholarship organization.

#### Frequently Asked Questions

Who should provide consent?	$\odot$
If I'm married and didn't file a joint tax return with my current spouse, on to provide consent for you to access their tax information?	does my spouse have ⊙
What happens after I provide consent?	$\odot$
What happens if I revoke consent?	$\odot$
What happens if I decline consent?	$\odot$
Select "Approve" to consent to using your tax information to determine aid. If you select "Decline," you will not	your eligibility for federal student be eligible for federal student aid
Previous Dec	ine Approve

# **Consent is REQUIRED**

Consent is required from all contributors, no matter the personal situation, to be eligible for federal aid:

- Tax filers
- Non-tax filers
- Foreign tax filers

### Contributors:

- Student
- Student's spouse
- Dependent student's parent (biological/adoptive)
- Dependent student's other parent (biological/adoptive/stepparent)



# **Student Personal Circumstances**



# **Dependency Status**

- The following questions will determine if the student is considered "Dependent" or "Independent"
- Dependent student: MUST report information about their parent(s)
- Independent student: will only report information about themselves and NOT their parent(s)



### **Student Marital Status**

### Dependency question #2

Students who are married/remarried are considered independent



# **Student College or Career Plans**

- The student is asked about their college grade level for the 2526 school year and if they will have their first bachelor's degree
- All high school students, regardless of if they took Concurrent Enrollment or Dual Enrollment, will select "First Year" and "No" to the 1<sup>st</sup> bachelor's degree
- Dependency questions #3&4
  - If the student selects "College graduate..." or "Yes" to completing a 1<sup>st</sup> bachelor's degree, they will be considered independent



🔿 Yes

🔿 No

# Student Personal Circumstances

- Dependency questions #5-12
  - If the student checks any of these boxes, they will be considered as independent
- If none of these options apply, dependent students should select "None of these apply"



#### 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.

The student is a veteran of the U.S. armed forces.

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, 20XX and June 30, 20XX.

At any time since the student turned 13, they were an orphan (no living biological or adoptive parent).

At any time since the student turned 13, they were a ward of the court

At any time since the student turned 13, they were in foster care.

The student is or was a legally emancipated minor, as determined by a court in their state of residence.

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.

None of these apply

۲

### **Student Other Circumstances**

Dependency question number 13

At any time on or after July 1, 2024 was the student **unaccompanied AND either** 

- 1. Homeless?
- 2. Self-supporting AND at risk of being homeless?



### Student Homelessness

At any time on or after July 1, 2024, was the student unaccompanied and either (1) homeless or (2) self-supporting and at risk of being homeless?

O Yes		○ No
-------	--	------



# Student Unusual Circumstances

- Financial dependency question
- The student is asked if unusual circumstances prevent them from contacting their parent(s). The student selects "Yes."
- Examples include...



### Student Unusual Circumstances

This information will help us evaluate the student's ability to pay for school.

Do unusual circumstances prevent the student from contacting their parents or would contacting their parents pose a risk to the student?

A student may be experiencing unusual circumstances if they

- left home due to an abusive or threatening environment;
- are abandoned by or estranged from their parents;
- have refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country;
- are a victim of human trafficking;
- are incarcerated, or their parents are incarcerated and contact with the parents would pose a risk to the student; or
- are otherwise unable to contact or locate their parents.

If the student's circumstances resulted in not having a safe and stable place to live, they may be considered a homeless youth and should review the answer to the previous question about being unaccompanied and homeless.







### Your Dependency Status



### **Provisionally Independent Student**

Based on your answers, you're a provisionally independent student. This means you don't need to answer questions about your parents to submit your application.

To complete your application, you'll need to contact your college's or career school's financial aid office and provide documentation to verify your circumstances.

We won't be able to calculate your Student Aid Index (SAI) until you confirm your circumstances with your financial aid office. Until then, we will provide only an estimate of your federal student aid eligibility as an independent student.

Previous

Continue

# Impact of Provisionally Independent Status

- If the student answers "Yes" to any of the dependency questions, this will be the screen they will see
- These students will be considered a provisionally independent student and are not required to provide parent information
- The student is able to sign and submit their FAFSA form, but they will need to contact their college to see what supporting documentation they need to submit (aka Verification)
- A financial aid administrator at the college will review and make a determination regarding a dependency override
- Until the student's circumstances are verified, Federal Student Aid will only provide the student an estimate of their federal student aid eligibility



Previous

# Independent Student Differences

- Will see all questions dependent student sees
- Will need to answer the following questions in the independent student financial section
  - Family size (Yes/No)
  - Number in college
- If married:
  - student will need to invite the spouse to contribute if they did not file taxes together
  - if they file taxes together, the student will just need to provide general identifying information





# Parent Questions: Dependent Students Only

# Parent Information

- Dependent students are asked to provide information about their parents
- The FAFSA Form considers their "Parent" to be their legal (biological or adoptive) parent
- The student is required to invite their parent(s) to their FAFSA form to complete the required parent sections
- Who is NOT considered a "contributor" or "parent" on the FAFSA?
  - Grandparents, foster parents, legal guardians, brothers or sisters, and aunts or uncles, even if they helped provide for or raise the student



### Tell Us About Your Parents

On the FAFSA<sup>®</sup> form, your "Parent" is your legal (biological or adoptive) parent or stepparent who supports you financially.

### Are your parents married to each other?

Yes

O No



### You will need to provide information for your parents

Based on your answers in this section, you'll need to provide information about both of your parents on your FAFSA form. You can invite your parents to your form so they can complete their required sections.



### **Parent Wizard Questions**

### Are the parents married to each other?

- If yes, provide information about both parents
- If no, next question

### Do the parents live together?

- If yes, provide information about both parents
- If no, next question

### Did one parent provide more financial support than the other parent over the past 12 months?

- If both parents provided an exact equal amount of financial support or if they don't support the student financially, select "No" and refer to the parent with the greater income or assets in the next question.
- Yes or No, next question

### Has the parent you identified in the previous question remarried?

- If yes, provide information for the parent and stepparent
- If no, provide information about this parent only

⊖ Yes	● No
Do the parents live together?	
O Yes	No
Did one parent provide more finance	cial support than the other parent over the past 12 months?
both parents provided an exact equa nancially, select "No," and refer to the	il amount of financial support or if they don't support the studer e parent with the greater income or assets in the next question.
🔿 Yes	No
<ul> <li>Yes</li> <li>Has the parent you identified in the</li> </ul>	No
Yes Has the parent you identified in the emember, this applies to the parent w	No      Previous question remarried?  with the greater income and assets.
<ul> <li>Yes</li> <li>Has the parent you identified in the emember, this applies to the parent w</li> <li>Yes</li> </ul>	No      Previous question remarried?  with the greater income and assets.      No      No
<ul> <li>Yes</li> <li>Has the parent you identified in the emember, this applies to the parent w</li> <li>Yes</li> </ul>	e previous question remarried? with the greater income and assets.  No
Yes Has the parent you identified in the emember, this applies to the parent w Yes Provide Inform	No  e previous question remarried?  with the greater income and assets.  No  nation for This Parent Only

### Dependent Student Invites Parents

- To invite the parent, the student must have the following information
  - First and Last Name
  - Date of Birth
  - Social Security Number (if applicable)
  - Email address
- If there is more than one parent involved, the student is only required to insert one of the parents' information to move forward
- Only one parent's info is needed to progress through the form; the 2<sup>nd</sup> parent can be invited by 1<sup>st</sup> parent contributor if needed

First Name	First Name		
Alcina	Last Name		
Last Name			
Tran			
Date of Birth Month Day Year 05 05 1973 3	Date of Birth Month Day Year		
Social Security Number (SSN)	Social Security Number (SSN)		
SHOW (1)	HIDE		
My parent doesn't have a SSN	My parent doesn't have a SSN		
Email Address	Email Address		
alcinatran@school.edu			
Confirm Email Address	Confirm Email Address		
alcinatran@school.edu			
Invite Parent	Invite Parent		

# **KEY GUIDANCE: Inviting Parents**

- Parent invite must match
  - legal name
  - date of birth
  - SSN (if they have one) or mailing address (if they don't have an SSN)
- Email address provided for contributors does not need to match the one used for the FSA ID
- Inviting matching issues need to be fixed by the student

# **RECOMMENDATION:** Talk through parent wizard questions before starting the FAFSA



# **Student Demographics**



### **Student Citizenship Status**

- Who qualifies for Title IV Federal Financial Aid and can file the FAFSA?
  - U.S. citizen or national
  - Eligible noncitizens will need to provide Alien Registration Number



Previous

Continue

# **FAFSA FAQs: Eligible Non-Citizens**

### **Question:**

- How would I know if a student is considered an "eligible non-citizen"?
- Can a student complete the FAFSA if they are an "eligible non-citizen"?

### Answer:

- Yes. Eligible non-citizens should complete the FAFSA, they will need to provide their "Alien Registration Number" and Social Security Number on the form.
- Example categories include: U.S. permanent residents (Green Card), refugees, or asylum grantees
- Please review documentation that Federal Student Aid stipulates as "eligible" on the following website:
  - <u>https://studentaid.gov/understand-aid/eligibility/requirements/non-us-citizens</u>

# **FAFSA Citizenship Terminology**

### • U.S. Citizens

Naturalized and born citizens

### • Eligible Non-Citizens

- Students with documentation that Federal Student Aid considers "eligible" for federal aid
- Categories include: Permanent Residents (Green Card), Refugees, Asylum Grantees, etc.

### Ineligible Students

- Students with documentation that Federal Student Aid considers "ineligible" for federal aid or those without documentation
- Categories include: Undocumented Students, those with DACA, TPS, DED, etc.

### International Students

- Foreign students who are going to attend (or attending) college in the United States
- International students are ineligible for federal aid from the FAFSA

# **FAFSA FAQs: Ineligible Students**

### Question:

• If a student is **ineligible** for federal student aid (grants, work-study, student loans), what options do they have to pay for college?

### Answer:

- Private scholarships are always an option.
- If a student needs to complete the FAFSA to qualify for a scholarship, work with their college's financial aid office or Dream Centers.
- In-state tuition may also be an option have the student ask their college or university if they qualify under House Bill 144.

# **Student High School Information**

		High School Information		
High School Information		From what high school did or will t	e student graduate?	
From what high school did or will the st	udent graduate?	State		
State		New York (NY)	0	
New York (NY)	0	City		
City		Brooklyn	0	
Brooklyn	0	High School Name - optional		
High School Name - antional		Brown High School	0	
Brown Hi	0	Brown With School		
Brown High School		Brooklyn, New York (NY)		
Q, Search				
		Q. Search Again		

# **Student Financials**



# Student Tax Return Information

- For student tax filers only two tax form questions will be asked
  - Taxable grants/scholarships
  - Foreign earned income exclusion
- Earnings from work will NOT be asked this includes non-tax filers
- This question usually applies to those renewing their FAFSA form, not to first-time applicants.

#### Student 2023 Tax Return Information

Refer to the student's 2023 tax return to answer the following questions.

If the answer is zero or the question does not apply, enter 0.

IRA Rollover Into Another IRA or Qualified Plan

\$ .00

Pension Rollover Into an IRA or Other Qualified Plan

\$ .00

#### Amount of College Grants, Scholarships, or AmeriCorps Benefits Reported as Income to the IRS

The student paid taxes on these grants, scholarships, or benefits. These usually apply to those completing their FAFSA® form again, not to first-time applicants. If married, include the amount the student's spouse received.

.00

#### Foreign Earned Income Exclusion

Previous

\$



### **Student Assets**

- This is any cash on hand or at home, savings accounts, or checking accounts that belong to the student
- Current Net Worth...
  - Don't include the home the student lives in
  - Net worth is the value of the investments minus any debts owed against them
- Current Net Worth of Businesses and Investment Farms
  - Enter the net worth of the student's business or for-profit agricultural operation
  - Net worth is the value of the businesses or farms minus any debts owed against them



#### Current Net Worth of Businesses and Investment Farms

Enter the net worth of the student's businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.

\$
----

### 529s and the FAFSA



You will insert all the amounts onto the parent's assets



**Other Owner:** If someone other than the parent or student owns the 529 but the student is the beneficiary, we do not insert that information on the FAFSA



**Custodial plans:** If the student owns a custodial 529, in which a custodian acts on behalf of the minor until the minor is of legal age, we will insert that 529 on the parent's assets if the parent is the custodian

• If the student has other siblings that have custodial plans and the parent is the custodian, we do not need to insert the other sibling plans

# 66

# **Student Colleges**



### **Student College Search**

	FAFSA* 2024	-25 🔳 Student Ra	ya Tran			:	D Save   FAFSAN	denu I	
		Personal Orcumsta Where shou Search for the co You can add up to If 0 of 20 Se Search by Scho State Calij	nces Demographics	Freencials AFSA? to send your FAFSA form. lected Schools bl Code X	Colleges	Signature			
		California (CA) School Name - op	) cionat	0 0	Rice Univer Burlington,	si <b>ty</b> California (CA)	Fede B09	eral School Code 1773	+ Select
		Q. Search Previous		_	Rhodes Col Centerville,	lege California (CA)	Fede E89	eral School Code 1235	+ Select
FAFSA	2024-25 Student Ray	e Tran	Firancials	Coleges	Smith Colle	e <b>ge</b> California (CA)	Fede G92	eral School Code 2383	+ Select
	Selected Co These are the co To change the pos schools name.	lleges lieges you want to re rition of a school in yo	ceive your FAFSA information our dist, use the up and down	on arrow buttons to the	Macalester Madison, Ca	College alifornia (CA)	Fede 038	eral School Code 8412	+ Select
	School list g To be eligible the first 2 por sending an er	idelines for Connect for state grant aid is sitions. If you update mail to stat@ctohe.or	ficut residents n Connecticut, you must list a your school choices later, pl 8	n eligible in-state o sase notify your sta	Wellesley C Springfield,	ollege California (CA)	Fede F09	eral School Code 1983	✓ Selected
	重 12 of 20 Sci	hools Selected			Q. Search and S	Select Schools			
	Showing 1 to 10	) of 12					< Previo	ous 🚺 2 3 4 5 Nex	d >
	1 Viniver North	sity of California Idge, CA	Federal School Code Q03453	Temo	Previou	IS .			Continue
1	2 $\land$ Univer V Northe	sity of California idge, CA	Federal School Code G03453	🗑 Remo	🗸 4 of 20	schools have b	een selected		Search and Select Schools
	3 v North	sity of California idge, CA	Rederal School Code 603-453	E Remove	Waw Info				

# **Student Signature**



### **Student Review Page**

- The review page displays the responses that the student has provided in the FAFSA form
- The student can view all their responses by selecting "Expand All" or expand each section individually
- To edit a response, the student can select the question's hyperlink and will be taken to the corresponding page
- Additionally, since the student invited their parent into the form, they see the parent contributor section and the status of their parent's invite



Continue

Previous

# Student Signature

• On this page, the student acknowledges the terms and conditions of the FAFSA form and signs their section.

Personal Circumstances Demographics Financials Colleges Signature

### Sign and Submit the FAFSA® Form

#### Summary

This page confirms that you understand the terms and conditions of the FAFSA® form and filled out the form accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

By signing this application electronically using your FSA ID, YOU, THE STUDENT, certify that you

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

# Student Signature

- On this page, the student acknowledges the terms and conditions of the FAFSA form and signs their section.
- After agreeing and signing, the student is able to submit their section of the FAFSA form
- Since parent information has not been provided, the FAFSA form is not considered complete and can't be processed yet

You also certify that you understand that the secretary of education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

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 purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Sign Your FAFSA Form	
🛃 I, Raya Tran, agree to the terms outlined above	
Cancel	Submit

# Student Section Complete

- This page displays information for the student about next steps, including tracking their FAFSA form
- The student is reminded that their form is not completed and can't be submitted until the parent completes the contributor section of the form and signs it
- Next, in this scenario, the student's invited parent will enter the FAFSA form and complete the parent section.
- Students will see status of contributor invitations – FSA will automatically resend 7 and 14 days after
- Incomplete FAFSA only stays in system for 45 days - after that, it is deleted



The estimated SAI is **subject to change** based on final processing of your FAFSA form. The SAI is **not** a measure of how much student aid you'll receive or how much you'll pay for college or career school. Schools use your SAI to determine your federal student aid eligibility.

Based on your answers, you're a provisionally independent student. To complete your application, you'll need to contact your school's financial aid office and provide documentation to verify your circumstance.

We won't be able to calculate your official SAI until you confirm your circumstances with your financial aid office. Until then, we are providing only an estimate of your federal student aid eligibility as an independent student.

Based on the **eligibility criteria**, you may be eligible for a **Federal Pell Grant** of up to \$6,000.00. You may also be eligible for other federal, state, or institutional grants; scholarships; and/or work-study programs.

# Dependent Student Parent(s) Communications



### **Dependent Student's Invited Parent Email Example**

#### Federal Student Aid Help Complete [StudentFirstName]'s Form [Contributor First Name], [StudentFirstName] [StudentLastInitial] can't be eligible for federal student aid without your input. Help them complete the Free Application for Federal Student Aid (FAFSA®) form. Providing information as a contributor does not make you financially responsible for [StudentFirstName]'s education costs. Completing the FAFSA form is how they qualify for student aid including Federal Pell Grants. federal student loans. 1.0 state financial aid, and school financial aid.

[Log in with your FSA ID (account username and password) to complete your section.]

Note: Forms are deleted after 45 days of inactivity.

Don't recognize [StudentFirstname]? Read [Help topic title].

#### Why You Were Invited Without your jonut [StudentEinth]

Without your input, [StudentFirstName] won't be eligible for federal student aid.

#### **Reasons To Finish Early**

Here's why it's a good idea to finish as soon as possible:

States and schools have different deadlines for student aid. Check the "FAFSA® Deadlines" page for more information.

 You may need extra time to make corrections after you submit.

O Can't find [StudentFirstname]'s Form?

Read [help topic title].

Sign up for text alerts to stay updated on our grant programs, loan forgiveness programs, repayment plans, and information about your loans.

#### 🎔 🗗 🖸 🖬 📼

This email was sent by: Office of Poderal Student Aid U.S. Department of Education 400 Maryland Ave. 3W. Weahington DC, 20082, US

Log In

### **Dependent Student's Parent Log In**

	Help Center Submit a Complaint English   Espa
Federal Student Aid	* Form ~ Loans and Grants ~ Loan Repayment ~ Loan Forgiveness ~ Log In 1 Create Account C
	Log In 🖘
	Email, Phone, or FSA ID Username test595011623
	Password Show Password
	Log In
	Forgot My Username Forgot My Password Create an Account
	Help Me Log In to My Account
Help Center   Contact Us   Site Feedback	About Us Announcements Data Center Resources Forms Libra

# This page provides information about being a contributor on a FAFSA form:

### Parent Contributing to the FAFSA® Form

You have entered Raya Tran's FAFSA\* forme

- This FAFSA form can't be submitted for processing until you provide some required personal and financial information.
- → You can save this form and come back to it later.



Frequently Asked Questions

Why have I been invited to contribute to this FAFSA\* form?

You have been invited to the student's form to provide personal and financial information that will help determine their eligibility for federal student ald.

Answers on the student's FAFSA form have indicated that you will need to provide additional information as a contributor to help determine their eligibility for federal student aid.

Does contributing to the form mean I'm responsible to pay for college?

0

 $\odot$ 

No! Providing your consent and personal and financial information doesn't make you financially responsible for the student's education costs.

 What do I need to complete my section(s)?
 Image: Complete my section(s)?

 You may need the following documents or information: your tax returns; records of child support received; current balances of cash, savings, and checking accounts; and net worth of investments, businesses, and farms.

 What kind of information will I be asked to provide?
 Image: Complete received; current balances of the student to be eligible for federal student aid, including grants and loans. With your consent, we can obtain your federal tax information automatically from the IRS to help you complete your section of the student's FAFSA form. You'll also need to provide personal and financial information.

 What happens after I complete my sections?
 Image: Complete my sections?

After you submit your required sections and the student's FAFSA form is processed, the student will receive a FAFSA Submission Summary. It will include the Student Aid Index (SAI), a number used to determine federal student aid eligibility. Schools will use the SAI to create a financial aid offer that explains the types and amounts of aid they are offering the student.

Previous

 $\bigcirc$ 

0

 $\bigcirc$ 

### My Activity

#### Raya Tran Wants Your Help on a FAFSA® Form

**Raya Tran** has identified you as a parent on their 2025–26 *Free Application for Federal Student Aid* (FAFSA®) form.

Parents are required to provide their financial and demographic information on the student's FAFSA form. This does not make you financially responsible for Raya's educational costs or any federal student loans they decide to accept.



#### Visit the FAFSA Help Center

#### Accept Invitation

**Decline Invitation** 

By accepting this invitation, you agree to share your personal and contact information from your StudentAid.gov account on the student's FAFSA form. Once you accept, your information will be linked to this form.

### **Troubleshooting Parent Communications**

- If the parent logs into studentaid.gov and does not see the FAFSA contribution option – the student will need to check the name, date of birth, and SSN or mailing address provided
- Parent doesn't need an email invitation to log in and see the FAFSA contribution option if the name, date of birth, and SSN match their FSA ID

**RECOMMENDATION:** Parents should create FSA IDs in the fall prior to students starting FAFSA.



# **Parent Starts the FAFSA**

- Parent can start the FAFSA and provide the majority of student information
  - Every section can be answered except for consent and signature
  - Parent will need to manually provide student tax information
- Parent will need to invite the student to contribute like the parent invite when the student starts the form
- Student will need to create an FSA ID, sign in, consent, and submit the FAFSA to be eligible for federal financial aid
- Students consent to Direct Data Exchange (DDX) will replace manually provided tax information



# Dependent Student Parent(s) Financials Section





### Parent Federal Benefits Received

Answers include:

- Earned Income Tax Credit (EITC)
- Federal Housing Assistance
- Free or Reduced Price School Lunch
- Medicaid
- Refundable Credit for Coverage Under a Qualified Health Plan (QHP)
- Supplemental Nutrition Assistance Program
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)



### **Parent Tax Filing Status**

• If the parent filed taxes, verified their identity (FSA ID), and approved consent, then the tax information should automatically pull from the



# Do you need to file taxes in order to qualify for aid from the FAFSA?

### Yes

 If the family has an income higher than the threshold set by the <u>IRS</u> <u>Publication 17</u> – Page 6

### No

 If the family's income is **lower** than the threshold set by the <u>IRS</u> <u>Publication 17</u> – Page 6

Table 1-1. 2022 Filing Requirements for Most Taxpayers

IF your filing status is	AND at the end of 2022 you were*	THEN file a return if your gross income was at least**
Single	under 65	\$12,950
	65 or older	\$14,700
Married filing jointly***	under 65 (both spouses)	\$25,900
	65 or older (one spouse)	\$27,300
	65 or older (both spouses)	\$28,700
Married filing separately	any age	\$5
Head of household	under 65	\$19,400
	65 or older	\$21,150
Qualifying surviving spouse	under 65	\$25,900
	65 or older	\$27,300

# What if the student's parents are undocumented and do not pay taxes?

- According to the National Immigration Law Center (NILC): "All wage earners—regardless of their immigration status—are required to pay federal taxes. The IRS provides ITINs to people who are ineligible for an SSN so that they can comply with tax laws."
- Regarding the FAFSA, the student won't qualify for any aid from the FAFSA until their parents file their taxes, regardless of their immigration status (for those parents who have an income higher than the IRS threshold). Those without an SSN will be given an Individual Taxpayer Identification Number (ITIN).

### What if the student's parents live in a foreign country?

 They will need to convert their currency to the U.S. Dollar and manually answer the foreign income questions.

# Tax Return Information

- Even with consenting to DDX, tax filers will see a few tax questions on the form – including EITC, taxable grants/scholarships, foreign earned income exclusion
- Manual path will be presented for separated/divorced parents whose tax filing status is not an accurate reflection of marital status, those who experienced identify theft at the IRS, and undocumented individuals who do not file

Parent 2023 Tax Return	Information	
Refer to the narent's 2023 tay ret	irn to answer the following que	stions
If the answer is zero or the auestic	on does not apply. enter 0.	50000
J 1 1 1 1 1		
IRA Rollover Into Another IRA or Q	ualified Plan	
\$	.00	
Pension Rollover Into an IRA or O	ther Qualified Plan	
•	00	
<b>ə</b>	.00	
Did the parent receive the Earned	Income Credit (EIC)?	
◯ Yes	◯ No	
Amount of Collage Grants, Scholar	chips or AmeriCarps Repetits P	Papartad as Income to the IPS
he parent paid taxes on these grants,	scholarships, or benefits. These u	usually apply to those completing
neir FAFSA® form again, not to first-ti eceived.	ime applicants. If married, include	e amount parent's spouse/partne
\$	.00	
Foreign Earned Income Exclusion		
\$	.00	
Foreign Earned Income Exclusion	.00	



#### Annual Child Support Received

Enter the total amount of child support the parent received for the last complete calendar year.

\$		.00
----	--	-----

#### **Parent Assets**

#### Current Total of Cash, Savings, and Checking Accounts

Don't include student aid.

\$		.00
----	--	-----

#### Current Net Worth of Investments, Including Real Estate

Don't include the home the parent lives in. Net worth is the value of the investments minus any debts owed against them.

\$		.00
----	--	-----

#### Current Net Worth of Businesses and Investment Farms

Enter the net worth of the parent's businesses and for-profit agricultural operations. Net worth is the value of the businesses and farms minus any debts owed against them.

.00



# Other Parent Information

- The initial parent to log in will then provide the information about their spouse or partner to invite them to the form for consent if it is needed
- For married parents who filed taxes as "Married Filed Jointly," only one parent's FSA ID and consent is required

<b>⊘</b>		
Demographics	Financials	Signature

#### Other Parent's Information

Enter the following information about the other parent.



# Other Parent Signature

- On this page, the parent acknowledges the terms and conditions of the FAFSA form and signs their section
- Since all required sections are complete, the parent can both sign and submit the student's FAFSA form
- Whoever is the last person needed to sign with "submit" the FAFSA form



#### Sign and Complete Your Section

#### Summary

This page confirms that you understand the terms and conditions of the FAFSA\* form and filled out the form accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

By signing the student's application electronically using your account username and password, YOU, THE PARENT, 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.

Sign for yourself and submit the application for Raya Tran (Student).

🗹 I, Alcina Tran, agree to the terms outlined above.



# FAFSA Confirmation

- Upon submitting the student's FAFSA form, the parent is presented with an abbreviated confirmation page
- This page displays information about tracking the student's FAFSA form and next steps
- The student will receive an email with the full, detailed confirmation
- With the student and parent sections completed and signed, the FAFSA form is now considered complete and submitted for processing



### What Happens Next

🖂 Email Sent

Confirm that the student received an email version of this page.

#### ☑ The Student Can Track the Status of Their Form

In one to three days, the student's FAFSA form will be processed and made available to their schools.

#### The Student Will Receive School Communications

We use the information collected on the student's FAFSA form to calculate their Student Aid Index (SAI). The SAI lets schools determine how much aid the student is eligible to receive. Schools will reach out to the student if they need more information. They will also contact the student with financial aid offers. Once received, the student can contact their financial aid offices directly to ask questions about their student aid packages.

### **Differences in Confirmation Page**

### If parent submits FAFSA

- Parent will see a congratulations page with very limited information
- Student will receive email confirmation page with estimated SAI and federal aid eligibility

### If student submits FAFSA

 Student will see full confirmation page on submission with SAI and estimated federal financial aid eligibility

# **FAFSA Submission Summary**

# **FAFSA Submission Summary Landing Page**

- Upon completion, the student receives a FAFSA Submission Summary
- The FAFSA Submission Summary is broken into four tabs:
  - Eligibility Overview, FAFSA Form Answers, School Information, and Next Steps
  - At the top, the student will see information about when their form was received and processed
  - They also have the option to print their FAFSA Submission Summary to keep for their records.



### Eligibility Overview

- On the Eligibility Overview tab, the student sees information about what federal student aid they may be eligible for, such as a Federal Pell Grant and Federal Direct Loans
- Any amounts of financial aid that display on this tab are estimates and are not guaranteed
- Final determination of the student's financial aid eligibility is provided by their school's financial aid office

bility Overview	FAFSA Form Answers	School Information	Next Steps		
timated Fede	ral Student Aid				
Federal Pell Gra	nt ①				
A Federal Pell ( students who h earned a degre Federal Pell Gr	Grant is awarded to und lave financial need and e or are in a teacher cer ants don't need to be rej	ergraduate who have not tification program. paid.	Up to	\$4,556	
Federal Direct Lo	oans (i)				
A federal direc you that you m	t loan is money lent by t ust repay with interest.	he government to	Up to	\$4,556	
Federal Work-Stu	udy i				
Federal Work-S to pay for scho	ederal Work-Study is a way for students to earn money pay for school through part-time jobs on or off campus.			You May Be Eligible	
Amounts shown enrollment and student aid to o	n here are only estimates the average cost of atte ffer you, which may incl	s of federal student aid ndance. Your school w ude additional aid fror	based on full-tir ill determine hov n your school or	ne v much • state.	
Learn more abo	ut financial aid				



#### Keep in mind, this is only an estimate

Always refer to your school's financial aid offer for a final determination of financial aid available.

# FAFSA Form Answers

- On the FAFSA Form Answers tab, the student sees the answers that they and, if applicable, their contributor(s) provided on their FAFSA form
- If any of the provided answers are incorrect, the student can choose to start a correction.



### **School Information**

- On the School Information tab, the student sees information about the college(s) and/or career school(s) that they selected to send their FAFSA information
- The student can compare the graduation rate, retention rate, transfer rate, default rate, median debt upon completion, and average annual cost of their selected schools

Eligibility Overview FAFSA Form An	swers School Informa	ation  Next Ste	ps			
Find an Affordable School Many schools offer the opportunity to attend college affordably. Learn about the costs and benefits associated with the schools you listed on your form.						
Learn More on College Scorecard 🗹	Learn More on College Scorecard 🖸 Showing results for family income between					
School Name Graduatio	n Rate ⑦ Retention Rate ⑦	3) Transfer Rate (?)	Default Rate	Median Debt Upon Completion ③	Average Annual Cost ③	
George Washington 15% University	89%	26%	64%	\$56,000	\$102,000	
University of North 26% Carolina, Chapel Hill	76%	25%	34%	\$24,000	\$38,000	
University of California, 55% North Ridge	65%	35%	15%	\$19,000	\$24,000	
View All ~						

# Thank You

# Questions?