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# 2022-23 FAFSA/WASFA

# Today's Presenters



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# TIPS FOR A SUCCESSFUL WEBINAR

1. You are not required to be on camera; but please be active on the chatbox and Q&A
2. Don't be afraid to ask questions; financial aid is confusing!
3. As soon as you feel lost, raise your hand or ask your question in the Q&A
4. Pay attention to the orange bubble
5. Use the cheat sheet



# TIPS FOR A SUCCESSFUL WEBINAR

Use the cheat sheet or a piece of paper to record your answers



## FAFSA/WASFA CHEAT SHEET

**1** What form are you going to fill out?



**A FAFSA**  
Free Application  
for Federal Student Aid

I will file a FAFSA

**B WASFA**  
Washington Application  
for State Financial Aid


I will file a WASFA

# Objectives



1. Identify which financial aid form to complete
2. Know what documents you will need
3. Review FAFSA and WASFA
4. Learn how to address special circumstances
5. Prepare for next steps

# 1. Identify which financial aid form to complete

FAFSA	OR	WASFA
<ul style="list-style-type: none"> <li>• U.S. Citizens</li> <li>• U.S. Nationals (American Samoa or Swains Islands)</li> <li>• U.S. Permanent Residents</li> <li>• I-94 Holders : Refugee, Asylum granted, Cuban-Haitian Entrant, Conditional entrant, Parolee</li> <li>• Visa Holders under VAWA</li> <li>• T or T-1 Visa Holders</li> </ul>		<ul style="list-style-type: none"> <li>• Undocumented students</li> <li>• Students with DACA (expired or not)</li> <li>• Other non-citizens** (check w/ individual college/university)</li> <li>• Defaulted/balance on federal loans/grants</li> <li>• Students who don't feel comfortable completing the FAFSA</li> <li>• Other reasons</li> </ul>
<div style="display: flex; align-items: center;">  <div style="background-color: #1a3d54; color: white; padding: 5px; border-radius: 5px;"> <p>Must meet SB 5194* requirements for in-state tuition &amp; in-state financial aid</p> </div> </div>		

\*Source: <https://wsac.wa.gov/wasfa> \*\*Other ways to be resident: <https://wsac.wa.gov/student-residency>



# Poll questions

Which form are YOU going to fill out?

A. FAFSA

B. WASFA

C. I'm not sure

Note: if you are unsure, ask your question in the chat box.

# EXITS FOR FINANCIAL AID

Federal  
Student  
Aid  
U.S. DEPARTMENT OF EDUCATION





# Types of financial aid

1



**Free  
money.**

Grants and scholarships are usually based on financial need and don't have to be repaid.

2



**Borrowed  
money.**

Loans are an investment in your future...if you borrow only what you need. Remember, they must be paid back with interest.

3



**Earned  
money.**

A work-study job allows you to earn money while you are in school

## 2. Know what documents you will need: **Dependency Status**

If answered "No" to all questions:  
**DEPENDENT STUDENT**

### PARENT(S) INFO REQUIRED

- Born before 1/1/1999?
- Enrolled in graduate program?
- Married?
- With dependents?
- Actively serving in the U.S. armed forces (other than training)?

If answered "Yes" to any questions:  
**INDEPENDENT STUDENT**

### NO PARENT(S) INFO REQUIRED

- Deceased, incarcerated parents or in foster care since age 13?
- Emancipated or in legal guardianship (court intervention)?
- Unaccompanied youth?
- At risk or effectively experiencing homelessness?





## Poll questions

Based on the dependency questions we just reviewed, are you considered a **dependent** or **independent** student?




- A. I am a **dependent student**
- B. I am an **independent student**
- C. I'm not sure

Note: if you are unsure, ask your question in the chat box.

## 2. Know what documents you will need

Refer to  
handout

**GATHER THIS INFORMATION**

-  Social Security number
-  Alien registration number
-  Federal tax information or tax returns
-  Records of untaxed income
-  Cash, savings, and checking account balances
-  Investments other than the home in which you live

You will need to compile these documents for the student **AND** parent(s), if applicable.

### Tip:

- Report tax and benefits information from **2020**
- Report account balances as of the day you complete application



## Poll questions

Based on the dependency answer, will you collect documents just for **yourself** or **yourself and your parent(s)**?

- A. I need to collect documents for **myself and my parents**
- B. I need to collect documents for **myself**
- C. I'm not sure

Note: if you are unsure, ask your question in the chat box.

# 3. Review FAFSA/WASFA: FSA ID/WASFA Account

**FAFSA:** <https://fsaid.ed.gov>



## Who needs an FSA ID?

- Student
- One parent if:
  - The student is a dependent student ; and if,
  - The parent has a social security number

## What number should the student/parent(s) use?

- Use your SSN
- If parent doesn't have SSN, **do not get an FSA ID**

## Tips:

- Parent and student need **different** email addresses and phone numbers
- If multiple children or parent is a student, parents can **use same** FSA ID/WASFA Account
- Make sure **ALL** information matches and it is correct!

**WASFA:** <https://wsac.wa.gov/wasfa>



## Who needs an Account?

- Student
- One parent if:
  - The student is a dependent student

## What number should the student/parent(s) use?

- Use SSN, DACA, or ITIN, if you have one. If you don't, leave blank.

Check  
your  
answers!



## Poll questions

I will need to secure log-ins for...

A. Myself

B. Myself and my parent

C. I'm not sure

**Tip: think about your dependency status**

**Note: if you are unsure, ask your question in the chat box.**

# 3. Review FAFSA/WASFA:Landing Pages

## FAFSA

<https://fafsa.ed.gov>

An official website of the United States government. Help Center English | Español

FederalStudentAid  
An Office of the U.S. Department of Education

UNDERSTAND AID ▾ APPLY FOR AID ▾ COMPLETE AID PROCESS ▾ MANAGE LOANS ▾

### Complete the FAFSA® Form

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

**New to the FAFSA® Process?**  
Completing the FAFSA form is free. Fill it out now.  
[Start Here](#)

**Returning User?**  
[Correct info](#) | [Add a school](#)  
[View your Student Aid Report \(SAR\)](#)  
[Log In](#)

### FAFSA® Announcements

#### Changes to Your Family's Financial Situation

If your or your family's financial situation has changed significantly from what is reflected on your federal income tax return (for example, if you've lost a job or otherwise experienced a drop in income), you may be eligible to have your financial aid adjusted. Complete the FAFSA questions as instructed on the application (including the transfer of tax return and income information), submit your FAFSA form, then contact the school you plan to attend to discuss how your current financial situation has changed. Note that the school's decision is final and cannot be appealed to the U.S. Department of Education. Visit [StudentAid.gov/coronavirus](https://studentaid.gov/coronavirus) for more information.

## WASFA

<https://wsac.wa.gov/wasfa>

**New User**

- Complete a WASFA for the first time
- Eligibility questionnaire

**NEW USER**  
Learn More & Start a New WASFA

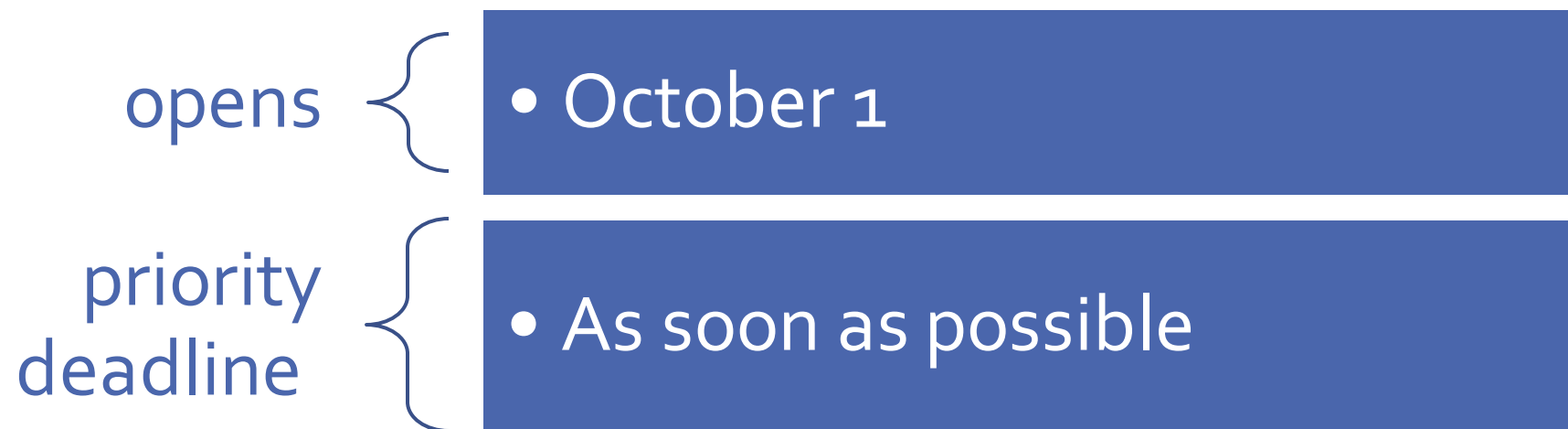
**Returning User**

- Make a correction/Add a school
- Submit an application for a new year

**RETURNING USER**  
Info & Log-In



### 3. Review FAFSA/WASFA: **VIP Dates**



**Tips:**

- Make sure to check **each school's** financial aid office individual deadline.
- If going out of state, check that state's FAFSA deadline

# 3. Review FAFSA/WASFA: Select the correct year



Get Started

**STUDENT INFORMATION**

Welcome, first last!

Fill out your FAFSA form!  
To receive federal student financial aid, you need to fill out a FAFSA every school year. Let's get started.

For which school year are you applying for financial aid?

If you are applying for a summer session, or just don't know which application to complete, check with the college you are planning to attend.  
[Which school year should I choose?](#)

**START 2022-2023 FAFSA** OR **START 2020-2021 FAFSA**

FSA ID Last Time, Date FSA ID Used:

**FSA ID Status:**  
[User Account Management](#)  
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.

Site Last Updated: Sunday, September 29, 2019 Download [Adobe Reader](#)

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## Washington Application for State Financial Aid (WASFA)

### STEP 1:

## Start WASFA

Start the WASFA application process.

### STEP 2:

## Select Schools

Select the schools that you want to receive a copy of your WASFA.

### STEP 3:

## Sign WASFA

Sign your WASFA.

Select the action to the right of the WASFA application, in the table below, to process your WASFA for each available academic year. You will be provided a list of schools that will receive your WASFA and must electronically sign the document to complete the process. Dependent students will be instructed to invite a parent to sign their WASFA before the application will be submitted. You may make changes at any time by selecting the action for starting and completing an application.

- Start, edit or complete an application.
- Invite a parent to sign an application.
- Sign an application.
- View an application.
- Download an application.

Document Name	Status	Actions
2019-2020 WA Application for State Financial Aid (WASFA)	Not Started	
<b>2022-2023 WA Application for State Financial Aid (WASFA)</b>	Not Started	

**REMEMBER: You'll fill out 2022-2023 FORMS**

# 3. Review FAFSA/WASFA: Sections

Keep track of sections!

Personal Information for Student

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

**STUDENT INFORMATION**

*i* Because the FAFSA belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

Your last name ?

Your first name ?

Your middle initial ?

Your Social Security Number

Your date of birth ?

STUDENT DEMOGRAPHICS 1 2 3 4

Personal Information

\* - Required Field ? - Help and Hints ! - Error Information

Provide your first name, middle initial and last name exactly as it appears on your Social Security or DACA Card. If you don't have a Social Security or DACA Card, your first/last name should match the name you provided to your college(s).

**First Name \***

Middle Initial

**Last Name \***

- Student Demographics
- Washington State Information
- Educational Plans
- Dependency Determination
- Student Income & Tax Data
- Parent Information
- School List

# 3. Review WASFA: State Residency

**New  
Residency  
Information**



Answer all the residency questions carefully and accurately. The residency law changed on July 25, 2021, making it easier for more students to qualify.

In this section you are certifying that you meet the requirements shown in the: **“WA State Higher Education Residency Affidavit”** and **“Certification Regarding Permanent Residency Application and Related Responsibilities.”** Please read the descriptions carefully.

Choosing “I will not meet” will open questions for you to answer regarding DACA.

**WASHINGTON STATE INFORMATION**

Back Save and Exit Exit Save and Continue Complete

**Residency Information**

Required Field Help and Hints Error Information

Please answer the following questions related to your residency status.

**Student's State of Residence**

Select

Provide the state where you reside.

**Did you become a resident of the state before 1/1/2021?**

Yes No

Indicate if you became a resident of the state before 1/1/2021.

**High School Information**

Provide details about your high school experience.

**High School Diploma or Equivalent**

Select

Indicate if you will have earned your high school diploma at a high school or college, GED or diploma equivalent prior to starting college in the 2021-2022 school year.

**WA State Higher Education Residency Affidavit**

Students must be residents to qualify for Washington in-state tuition rates at public institutions and meet residency requirements for state financial aid programs at participating schools. The Residency Affidavit is one way to show you are a resident. The affidavit is a promise between you and the institution determining residency. To be able to certify this affidavit, you must meet the following eligibility requirements:

- Earn a high school diploma, GED, or diploma equivalent before your first term at the college determining residency.
- Maintain a primary residence in Washington for at least 12 consecutive months immediately before your first term at the college determining residency, and
- Promise that one of the following is true:
  - You will file an application to become a permanent resident of the United States as soon as you are eligible to apply. And, that you are also willing to engage in activities designed to prepare you for citizenship, including citizenship or civics review courses, or
  - You are a U.S. citizen, U.S. national, or U.S. permanent resident.

**Please choose one of the following**

I certify that, by the official start date of my first term at the college determining residency, I will have met the eligibility requirements above.

I will not meet the eligibility requirements above by the official start date of my first term at the college determining residency. I want to learn other ways to meet residency requirements for in-state tuition and state financial aid.

Back Save and Exit Save and Continue -> Complete

## Why is this important?

- It will determine your eligibility for in-state tuition and state financial aid

## 3. Review WASFA: DACA

### Why is this important?


- It will determine your eligibility for state work-study

WASHINGTON STATE INFORMATION

Back Save and Exit Exit Save and Continue

DACA Status

\* - Required Field ? - Help and Hints ! - Error Information

**Do you have DACA status? \***  Answer "Yes" even if it has expired

Yes  No

? Select Yes if you applied for and were granted Deferred Action for Childhood Arrivals (DACA) status. Otherwise, select No.

# 3. Review FAFSA/WASFA: Academic Plans

Student Education

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

**STUDENT INFORMATION**

What will your high school completion status be when you begin college in the 2022-23 school year?  
**High school diploma**

What college degree or certificate will you be working on when you begin the 2022-23 school year?  
Select

Will you have your first bachelor's degree before you begin the 2022-23 school year?  
 Yes  No

What will your college grade level be when you begin the 2022-23 school year?  
**Never attended college/1st yr.**

Are you interested in being considered for work-study?  
 Yes  No  Don't know

**Why is this important?** Because program and year in college affect type and amount of aid you can receive.

- Type of Degree or Certificate \***
- Select
  - 1st Bachelors Degree
  - 2nd Bachelors Degree
  - Associate Technical Degree
  - General Associates Degree
  - Certificate or Diploma of less than 2 Years
  - Certificate or Diploma of at least 2 years
  - Teaching Certificate
  - Graduate or Professional
  - Other or Undecided

HS Seniors: Even if you have **dual enrollment** or taken college credits (i.e.; **Running Start**), you will choose this option.

- Select
- Never attended college/1st yr.
  - Attended college before/1st yr.
  - 2nd yr./sophomore
  - 3rd yr./junior
  - 4th yr./senior
  - 5th yr./other undergraduate
  - 1st yr. college graduate/professional (MBA, MD, PhD, etc.)
  - Continuing graduate/professional or beyond (MBA, MD, PhD, etc.)



# Poll questions

## What program will I enroll in next year(2022-2023)?

- If you are headed to 2-year college, then it will probably be an **associate degree, diploma or certificate\***
- If you are headed to 4-year university, then it will probably be a **bachelor degree**

**A. Associate's Degree**

**B. Bachelor's Degree**

**C. Certificate or Diploma**

**D. Other**

**E. I'm not sure**

\*if you are thinking of apprenticeships, then choose “Other”



## Poll questions

What will your grade level be when you begin the 2022-2023 school year?

- If you are in high school now, choose: Never attended college/1<sup>st</sup> year

A. Never attended college/1st yr.

E. 4th yr./ Senior

B. Attended College before/1st yr.

F. 5th yr./Other undergraduate

C. 2nd yr./Sophomore

G. Other

D. 3rd yr./Junior

H. I'm not sure



# 3. Review FAFSA/WASFA: School Selection

## FAFSA

Search for Colleges

Student Demographics **School Selection** Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

State  
Select

City (optional)

School Name (optional)

SEARCH TIPS ⓘ PREVIOUS SEARCH 🔍

School Name: University Of Washington  
Federal School Code: 003798  
Housing Plans  
Select

On Campus  
With Parent  
Off Campus

Why is this important?  
Housing choice affects your overall budget (or cost of attendance) which in turn can affect how much aid you receive.

## WASFA

Select the schools to receive a copy of your WASFA, along with your housing plans for that school. Select at least one school and up to ten schools to receive your information.

\* - Required Field ? - Help and Hints ! - Error Information

School 1 \*  
University of Washington

Housing Plan for School 1 \*  
On Campus  
Please indicate where you plan to live while in school.

School 2  
Renton Technical College

Housing Plan for School 2 \*  
Off Campus or Other  
Please indicate where you plan to live while in school.

School 3  
Edmonds Community College

Housing Plan for School 3 \*  
With Parents  
Please indicate where you plan to live while in school.

School 4  
Select

If you want to live on campus, or don't know what your housing plan will be yet, select "On Campus"

Tip: Select up to 10 schools. Give yourself options and backup plans!

### 3. Review FAFSA/WASFA:

## Whose information should you report?



**BIOLOGICAL OR ADOPTIVE PARENTS ONLY**

(& stepparent IF married to biological parent)



Grandparents, foster parents, legal guardians, older brothers or sisters, and aunts and uncles are not considered parents unless they have legally adopted the student.

# 3. Review FAFSA/WASFA: Parent Scenarios

Scenario	You will select the following answer:	Heads up
<b>Able</b> to provide parent(s) information	<input type="checkbox"/> "I will provide parent information"	No follow up required

# 3. Review FAFSA/WASFA: Parent Scenarios

Scenario	You will select the following answer:	Heads up
<p><b>Unable</b> to provide parent(s) information</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> "I am unable to provide parent(s) information"</li> <li><input type="checkbox"/> "I have a special circumstances and I am unable to provide parent(s) information"</li> <li><input type="checkbox"/> "I understand I must follow up with the financial aid administrator after I submit the FAFSA."</li> </ul>	<ul style="list-style-type: none"> <li>- No EFC calculated</li> <li>- Follow up with the financial aid office; supporting documentation required</li> </ul>

# 3. Review FAFSA/WASFA: Parent Scenarios

Scenario	You will select the following answer:	Heads up
<p><b>Unwilling</b> to provide parent(s) information</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> "I am unable to provide parent(s) information"</li> <li><input type="checkbox"/> "I do not have a special circumstance, but I am unable to provide information about my parent(s)"</li> </ul>	<ul style="list-style-type: none"> <li>- Very limited funding available</li> <li>- Some financial aid offices may consider an appeal if stepparent refuses to provide information.</li> </ul>



# Poll questions

What is your parent scenario?

- A. Able to provide parent(s) information**
- B. Unable to provide parent(s) information**
- C. Unwilling to provide parent(s) information**
- D. I'm not sure**

Tip: if you are unable to provide parent information, contact us after this presentation for additional guidance.

# 3. Review FAFSA/WASFA: Parent Section

FAFSA

WASFA

PARENT INFORMATION

## Parent Marital Status

**i** Because the FAFSA® form 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?

Select

- Select
- Never married
- Unmarried and both legal parents living together
- Married or remarried
- Divorced or separated
- Widowed

Continue

PARENT INFORMATION

1 2 3 4 5

Back

Save and Exit

Exit

Save and Continue

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

### Parents' Family Information

\* - Required Field ? - Help and Hints ! - Error Information

Please provide the following information about your parents.

#### Parents' Marital Status \*

Never Married

? As of today, what is the marital status of your legal parents?

Check  
your  
answers!

**Tip:** Make sure to select parent(s) marital status accurately.

# 3. Review FAFSA/WASFA: Parent(s) w/ no SSN

## FAFSA

### PARENT INFORMATION

#### Enter Information for Your First Parent (father/mother/stepparent)

Your Parent's Social Security Number

000-00-0000

HIDE SSN



Your Parent's Last Name



Your Parent's First Initial



Your Parent's Date of Birth

Month Day Year



Your Parents' Email Address



## WASFA

### Parent 1 Information

\* - Required Field ? - Help and Hints ! - Error Information

Please provide the following information about your father/mother/stepparent.

**Parent 1 SSN \***

000-00-0000

Indicate your father's/mother's/stepparent's Social Security Number. If your parent does not have a Social Security Number, please enter all zeros (000000000). No dashes are necessary.

**Parent 1 Last Name \***

Jane

Indicate your father's/mother's/stepparent's last name.

**Parent 1 First Name \***

Smith

Indicate your father's/mother's/stepparent's first name.

**Parent 1 Date of Birth \***

- Tip 1:** Parent/s do not need a Social Security number for their student to apply for financial aid
- Tip 2:** Use all zeroes (do not use ITIN)

Check  
your  
answers!



### 3. Review FAFSA/WASFA: Whose taxes to use?

Report information:

- Parent(s) with whom student **LIVES with more than HALF of the time**; If equal time, then...
  - Parent who provides **more than HALF of student's financial support**.
- 
- If parents are **living together**, report both parents' information
  - If parents are **not living together**, report information about parent identified above
  - If parents are **divorced and remarried**, report information about parent and stepparent.

**Tip:**

It doesn't matter who claims student on taxes. Number of parents and marital status have to match.



# Poll questions

Whose parent tax information will you need to file your FAFSA/WASFA?

- A. No parent info**
- B. One parent**
- C. Both parents**
- D. Parent & stepparent**
- E. I'm not sure**

Note: if you are unsure, ask your question in the chat box.

# 3. Review FAFSA: Who lives at home?

## FAFSA

### Enter Information for Your Parents' Dependents

**i** Do not include yourself (the student).

**How many other dependent children do your parents have?**

Include the other dependent children of your parents if they

- will rely on your parents for more than half of their financial support between July 1, 2021 and June 30, 2022;
- or
- can answer "no" to every dependency status question on the FAFSA® form.


**How many other dependents do your parents have?**

Include your parents' other dependents if they

- now live with your parents,
- currently receive more than half of their support from your parents,
- and
- will continue to receive more than half of their financial support from your parents between July 1, 2021 and June 30, 2022.

### PARENT INFORMATION

#### Parent Household Information

 Your household size is 4.

You:	Your Parents:	Other Dependent Children of Your Parent(s):
1	2	1

#### Number in College

Out of the 2 dependents in your parents' household (as shown above), how many will be college students between July 1, 2021 and June 30, 2022? **DO NOT include your parents, but DO include yourself** and other members of the household.

May include unborn child

Live-in significant other unless receiving 50% of financial support

Cannot include parents in number attending college



# 3. Review WASFA: Who lives at home?

## WASFA

### Parents' Household Number of Family Members \*

4

Indicate the number of people in your parents' household. You should include:

- Yourself, even if you don't live with your parents.
- Your parents.
- Your parents' other children (even if they do not live with your parents) if (a) your parents will provide more than half of their support between July 1, 2019 and June 30, 2020, or (b) the children were considered dependent students by the Department of Education standards (they must be able to answer "No" to every question in Dependency Determination section of this process), and
- Other people if they now live with your parents and your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2019 and June 30, 2020.

Note: Do not include siblings who are in U.S. military service academies.

### Parents' Household Number in College \*

3

Indicate the number of people in your legal parents' household who will be college students between July 1, 2019 and June 30, 2020. Always count yourself as a college student. Do not include your parents. You may include others only if they will attend a college, university, institution, or technical school, at least half-time in 2019-2020, for a program that leads to a college degree or certificate.

May include  
unborn child

Live-in  
significant  
other unless  
receiving 50%  
of financial  
support

Cannot include  
parents in  
number  
attending  
college

Check  
your  
answers!



# Poll questions

In your notes, write down the number of family members you will include:

- **Self**
- **Parent(s)**
- **Siblings (even if they are away at school)**
- **Other members who receive most of their financial support by you or your parent(s)**

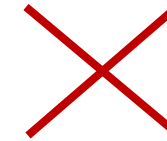
**Note: if you are unsure, ask your question in the chat box.**



### 3. Review FAFSA/WASFA Financial Scenarios

Family files taxes and it  
is eligible to use IRS  
Data Retrieval tool

Family files taxes but it  
is NOT eligible to use  
IRS Data Retrieval tool



Family doesn't file taxes

Manually enter information on FAFSA or WASFA

# 3. Review FAFSA: IRS Data Retrieval Tool



## WHO CAN USE IT?

- Must have valid Social Security Number
- Must have filed 2020 federal tax returns; no amendments.
- No change to marital status since 12/31/2020
- Must have filed as single or married filing jointly

### 3. Review FAFSA: IRS Data Retrieval Tool



#### **WHO CAN'T USE IT?**

- Those married filing separately
- Those married filing as head of household
- Those unmarried and living together
- Filed using ITIN
- Foreign tax returns
- Victims of identity theft



# 3. Review FAFSA: IRS Data Retrieval Tool



RECOMMENDED  
IRS Data Retrieval Tool


Based on your responses, your parents are not eligible to transfer his or her information from the IRS into this FAFSA® form.

Select "Continue."



RECOMMENDED  
IRS Data Retrieval Tool


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

 For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

# 3. Review FAFSA: IRS Data Retrieval Tool

Student Leaving FAFSA

**STUDENT INFORMATION**

 **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 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.

SKIP IRS DRT

PROCEED TO IRS SITE

**Link to IRS**

 **IRS** | [Return to FAFSA](#) | [Help](#) | [Logout](#) | [Español](#)

## Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from **2020 Federal Income Tax Return**

All fields are required unless marked otherwise.

**First Name**

  
**Last Name**

**Look up tax data**

## 2020 Federal Income Tax Information

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form. The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

Refer to your tax records if you have a question about the values you reported.

**Transfer My Tax Information into the FAFSA Form**

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

**Do Not Transfer My Tax Information and Return to the FAFSA Form**

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.

**Transfer to FAFSA**

# 3. Review FAFSA: Data Transfer

Parent IRS Info

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Financial Information **✍** Sign & Submit Confirmation

✓ You have successfully transferred **2020** 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** ?

PREVIOUS NEXT

Transferred tax information **will not be viewable** on FAFSA or SAR.

# 3. Review FAFSA/WASFA: Manually Entering Data



WASFA

**Parents' AGI from Income Tax Return \***

Indicate the adjusted gross income shown on your parents' income tax return. Adjusted gross income is shown on IRS Form 1040-line 8b.

**Parents' Taxes Paid from Income Tax Return \***

Indicate the total amount of income taxes paid by your parents. The paid income tax amount is shown on IRS Form 1040-line 13 minus Schedule 2-line 2. If negative, enter a zero here.

FAFSA

**PARENT INFORMATION**

What was your parents' adjusted gross income for 2019? This amount is found on IRS Form 1040-line 8b.

\$ 28,000 .00 INCOME ESTIMATOR

Enter the amount of your parents' income tax for 2019. This is the total amount of IRS Form 1040-line 14 minus Schedule 2-line 2.

\$ 2,000 .00

# 3. Review FAFSA/WASFA: Additional \$\$ Information

- Cash, checking, saving, stocks, bonds, UGMA and UTMA (if you are the owner) **balances** as of the day you fill out the form. **Amounts.**
- **Benefits** such as Medicaid or Supplemental Security Income (SSI) benefits; Supplemental Nutrition Assistance Program (SNAP); Free or Reduced-Price School Lunch (FRL); Temporary Assistance for Needy Families (TANF); 5) Special Supplemental Nutrition Program for Women, Infants and Children (WIC) benefits. **YES/NO answer**
- **Untaxed income** such as child support received, non-educational veteran benefits, refugee assistance, etc. **Do not include** foster care or adoption assistance payments, EIC, student aid, child tax credit, welfare, untaxed SS/SSI. **Amounts.**
- **Investments** (net worth amount):
  - **Farm** (if you don't live in it): Report only if farm employs 100 or more full-time staff. You'd report market value of land, buildings, machinery, equipment, inventory, etc.
  - **Properties** (if you don't live in it)
  - **Business:** Include if family owns/controls less than 50% and has 100 or more full-time staff.

**Exclusion of CARES Act emergency aid:** Any CARES Act emergency aid you received this year does NOT need to be included. This guidance also applies to institutional emergency aid awarded as a result of COVID-19 expenses.



# 3. Review FAFSA/WASFA: College Saving Plans

Owner	Report as	Treatment of Qualified Distribution
Dependent Student	Parent asset (balance)	Not reportable
Parent of Dep Student	Parent asset** (balance)	Not reportable
Independent student	Student asset (balance)	Not reportable
Another family member or third party	Ignored	Report as untaxed income to the beneficiary*

\*Report the year after it was distributed; if used for non-qualified expenses, report under adjusted gross income

\*\*Parents with multiple college savings plans must report ALL balances (i.e.; multiple children) every year, for every child.

# 3. Review FAFSA: Signature

## OPTION 1

**Signature Status**

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**i** 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.

<p><b>Student Signature Needed</b></p> <p>Signature Status: <b>Unsigned</b></p> <p><b>PROVIDE STUDENT SIGNATURE</b></p>	<p><b>Parent Signature Needed</b></p> <p>Signature Status: Unsigned</p> <p><b>PROVIDE PARENT SIGNATURE</b></p>
---	--

[PREVIOUS](#)

**Signature Options**

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

**Parent Signature for**  
Social Security Number: XXX-XX-2222  
Last Name: last  
Date of Birth: 06/06/1960

**What is your (the parent's) FSA ID?**  
Do not enter the FSA ID if you are not the parent.

FSA ID Username, E-mail Address, or Mobile Number  
test351  
[Forgot Username](#) | [Create an FSA ID](#)

FSA ID Password  
\*\*\*\*\*  
[Forgot Password](#)

**SIGN THIS FAFSA**

**OTHER OPTIONS TO SIGN AND SUBMIT** | [SIGNATURE STATUS](#) | [NEXT](#)

Site Last Updated: Sunday, Sep 10, 2012 10:00 AM  
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**Signature Status**

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

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

<p><b>Student Signature Complete</b></p> <p>Social Security Number: XXX-XX-1140 Last Name: AUTUMNALE Date of Birth: 01/25/1999 Signature Status: <b>Signed Electronically</b></p>	<p><b>Parent Signature Complete</b></p> <p>Social Security Number: XXX-XX-0595 Last Name: Shadbush Date of Birth: 07/30/1987 Signature Status: <b>Signed Electronically</b></p>
---	---

**Don't forget to submit** | [SUBMIT MY FAFSA NOW](#)

# 3. Review FAFSA: Signatures: If NO FSA ID available

## OPTION 2

**Signature Options**

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Financial Information ✓ **Sign & Submit** Confirmation

**Parent Signature for**  
Social Security Number: XXX-XX-0080  
Last Name: DOUGLAS  
Date of Birth: 03/20/1964

Other Options to Sign and Submit

**?** We recommend signing electronically with an FSA ID so you don't have to print and mail a signature page or return later to sign this FAFSA. If you are unable to sign electronically, select another option:

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.

SIGNATURE STATUS NEXT

**Signature Status**

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Financial Information ✓ **Sign & Submit** Confirmation

**i** 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: 02/09/1999  
Signature Status: **Submit Without Signatures**  
[choose another way to sign](#)

PREVIOUS **SUBMIT MY FAFSA NOW**

### In case:

- Parent does not have a SSN
- Unable to resolve name, SSN, date of birth mismatch (so FSA ID doesn't work)
- Forgot login credentials and unable to recover account

### Tips:

- Don't forget to mail it to the address provided in form itself.
- **Keep a copy** for your records.





## Poll questions

How will your parent(s) sign your FAFSA?

- A. FSA ID**
- B. Signature page**
- C. I'm not sure**

Note: if you are unsure, ask your question in the chat box.

# 3. Review FAFSA: Student Aid Report

Federal Student Aid | PROUD SPONSOR of  
the AMERICAN MIND®  
an OFFICE of the U.S. DEPARTMENT of EDUCATION

## STUDENT AID REPORT ACKNOWLEDGEMENT 2021-2022

HTTPS://FAFSA.GOV

OMB No. 1845-0001

NOVEMBER 23, 2021

DATA RELEASE NUMBER (DRN): 2245  
EXPECTED FAMILY CONTRIBUTION (EFC): 000000 \*C

000001C001

F 211 1819

JOHN SMITH  
742 EVERGREEN TERRACE  
SPRINGFIELD OH 55555

Dear JOHN SMITH,

Your Student Aid Report (SAR) summarizes the information you submitted on your 2018-2019 Free Application for Federal Student Aid (FAFSA).

### Application Status (review the checked boxes)

- Your FAFSA appears to be complete. **Review the data on pages 3-10 of your SAR and make corrections or updates if necessary.** The school(s) listed on your FAFSA will receive your information.
- Your FAFSA has been selected for **verification**. Verification is a process where your school confirms the data you reported on your FAFSA. Your school has the authority to contact you for documentation that supports income and other information that you reported on your FAFSA.

### Heads up:

Read cover letter closely and follow any instructions.

If you see an asterisk next to your EFC, the student was selected for verification.

Encourage student to gather financial documents to submit to the financial aid office.

# 3. Review WASFA: Student Aid Report

## 2022-23 WA Application for State Financial Aid

**PREVIEW MY FORMS**

Preview My Forms

Your responses to the previous questions have been pre-populated in the application listed below. Please select View Form to see your pre-populated application. You should review the information carefully and make any necessary changes before proceeding.

If your application is complete and accurate, and no changes are necessary, please check the acknowledgement box below and proceed to the next page.

**2022-23 WA Application for State Financial Aid (WASFA)** [View Form](#)

Acknowledge that all information provided on my application is true and correct.

[Back](#) [Next](#)

Calculated Expected Family Contribution (EFC):	87
Certifications and Signatures	<b>WARNING: If you purposely give false or misleading information you may have to repay any financial aid received as a result.</b>
Each person signing below certifies that all of the information reported is complete and correct.	
Print Student's Name	Student's ID Number
Electronically signed By	10/1/2019 9:28 PM
Student's Signature (Required)	Date
Electronically signed By	10/1/2019 9:39 PM
Parent's Signature (Required)	Date

- You MUST open and review this form before you can acknowledge that the information is true and correct. The form will open in a separate tab.
- Make sure to review all of your answers carefully before signing and submitting.
- Once you have viewed it you can close the window, check the box acknowledging your information is true and correct, then click on the Next button.

# 3. Review WASFA: Student Signature

## Electronic Signature Process

Student Certification and Electronic Signature: The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature. To certify your application, read the text below and provide an electronic signature by typing your name in the answer field. I certify or declare under penalty of perjury under the laws of the State of Washington that the foregoing information is true and correct. By typing my full legal name I provide my electronic signature.

Name on File: **MARIA REBECCHI**

First Name:  \*

Provide the first name used when you created your account.

Last Name:  \*

Provide the last name used when you created your account.

Password:  \*

Provide the password used to access this website.

Current City:  \*

Place (City and State) Where Electronic Signature Was Completed: The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature.

Current State:  \*

Place (City and State) Where Electronic Signature Was Completed: The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature.

**Important Notice:** In order to complete this process a parent must electronically sign your WASFA application. After you electronically sign the application, select the parent signature invitation action and follow the instructions.

## Washington Application for State Financial Aid (WASFA)

### STEP 1: Start WASFA

Start the WASFA application process.

### STEP 2: Select Schools

Select the schools that you want to receive a copy of your WASFA.

### STEP 3: Sign WASFA

Sign your WASFA.

Select the action to the right of the WASFA application, in the table below, to process your WASFA for each available academic year. You will be provided a list of schools that will receive your WASFA and must electronically sign the document to complete the process. Dependent students will be instructed to invite a parent to sign their WASFA before the application will be submitted. You may make changes at any time by selecting the action for starting and completing an application.

- Start, edit or complete an application.
- Invite a parent to sign an application.
- Sign an application.
- View an application.
- Download an application.

Document Name	Status	Actions
2019-2020 WA Application for State Financial Aid (WASFA)	Not Started	
2022-23 WA Application for State Financial Aid (WASFA)	Incomplete - Parent Signature Pending	

Don't forget to invite your parent!

# 3. Review WASFA: Invite Parent to Sign

## Washington Application for State Financial Aid (WASFA)

Choose parent to sign 2022-23 WA Application for State Financial Aid (WASFA)

Primary Parent's Last Name	Primary Parent's First Name	Primary Parent's Email
GARCIA	A	<input type="text" value="ENTER YOUR PARENT'S EMAIL ADDRESS"/>

This parent is signing this document

Second Parent's Last Name	Second Parent's First Name	Second Parent's Email
PEREZ		

This parent is signing this document

Back

Exit

## Washington Application for State Financial Aid (WASFA)

Confirm parent selection

You have chosen A GARCIA (GARCIAA@GMAIL.COM) to view and sign the 2022-23 WA Application for State Financial Aid (WASFA) document. After you click the "Generate Portal Access and E-signature Email" button below, an email containing login instructions to the portal will be sent to your parent.

I confirm and acknowledge that A GARCIA will be able to view and sign 2022-23 WA Application for State Financial Aid (WASFA).

Back

Exit

**Generate Portal Access and E-signature Email**

- Your parent will receive an email with a link to create their own account and to electronically sign your application. **This link expires in 72 hours.**
- If your link has expired, log back in to your student account and send a new invitation.

# 3. Review WASFA: Parent Receives Invite

Action Required – WASFA Parent Signature Inbox x

wasfa@wsac.wa.gov

3:42 PM (13 minutes ago)

to [redacted]

Sally Jones has selected you to sign the **2022-23** Washington Application for State Financial Aid (WASFA). Your username is [redacted]@gmail.com. Please log in by going to the [Parent Portal](#) and login with your current user name and password to sign this application.

If you have any questions about your account or the signature process please contact the Washington Student Achievement Council at [wasfa@wsac.wa.gov](mailto:wasfa@wsac.wa.gov) or 888-535-0747.

## Washington Application for State Financial Aid (WASFA)



Sign an application.



View an application.



Download an application.

Document Name	Student Name	Status	Actions
2022-2023 WA Application for State Financial Aid (WASFA)	Sally Jones	Completed on 10/8/2018	 

# 3. Review FAFSA/WASFA: Common Mistakes

We already covered:

- ✓ Not filing your FAFSA or WASFA...early!
- ✓ Errors in name, SSN, DOB
- ✓ Incorrect answers to Dependency questions
- ✓ Wrong marital status
- ✓ Errors in number of family members in household & in college
- ✓ Entering the wrong income information
- ✓ Forgetting to sign and submit the form!



# 4. Address Special Circumstances

ADDRESS WITHIN FORMS

## Within the application:

- No social security number
- Parents' marital status and taxes

## Within application AND gather documentation:

- Homelessness
- Self-supporting
- Unaccompanied minor
- Foster Youth
- Deceased parents
- Incarcerated parents
- Emancipated, legal guardianship, ward of the court


SUBMIT APPEAL TO FINAID OFFICE

## Prepare dependency override

- **Unable to locate parents**
- **Staying with family members/friends**

## Prepare special circumstance appeal:

- **Changes in family income**
- **Unexpected/additional expenses**



Refer to  
handout

Prepare your petition using this tool:  
<https://formswift.com/swift-student>



# 5. Prepare for Next Steps

## 1. Get your Student Aid Report

- Within 3-7 days, the student's FASFA application will be processed
- Within 24 hours, the student's WASFA application will be available to the financial aid office(s)
- Review your answers for accuracy
- Make corrections if necessary
- Provide missing signatures if necessary

## 2. Contact your financial aid office

- There may be additional paperwork you need to complete
- Check your email and student portal regularly. Respond promptly to any requests.
- Prepare petitions or appeals and gather documentation if you have any special circumstances we discussed earlier.

## 3. Reapply every year in October



# 5. Prepare for Next Steps: Timeline

Complete your  
FAFSA or  
WASFA

Results sent to  
colleges &  
universities

Receive  
instructions on  
next steps

Respond  
promptly

Receive an  
award letter –  
Review  
carefully!

Accept or  
decline your  
financial aid  
offer

Repeat every  
year on  
October 1

Prepare your  
appeal or  
petition,  
gather  
documents,  
send to  
schools

If offer is  
insufficient,  
consider  
appealing

Ask questions,  
discuss with  
adults,  
calculate your  
out-of-pocket  
costs

# DON'T FORGET!

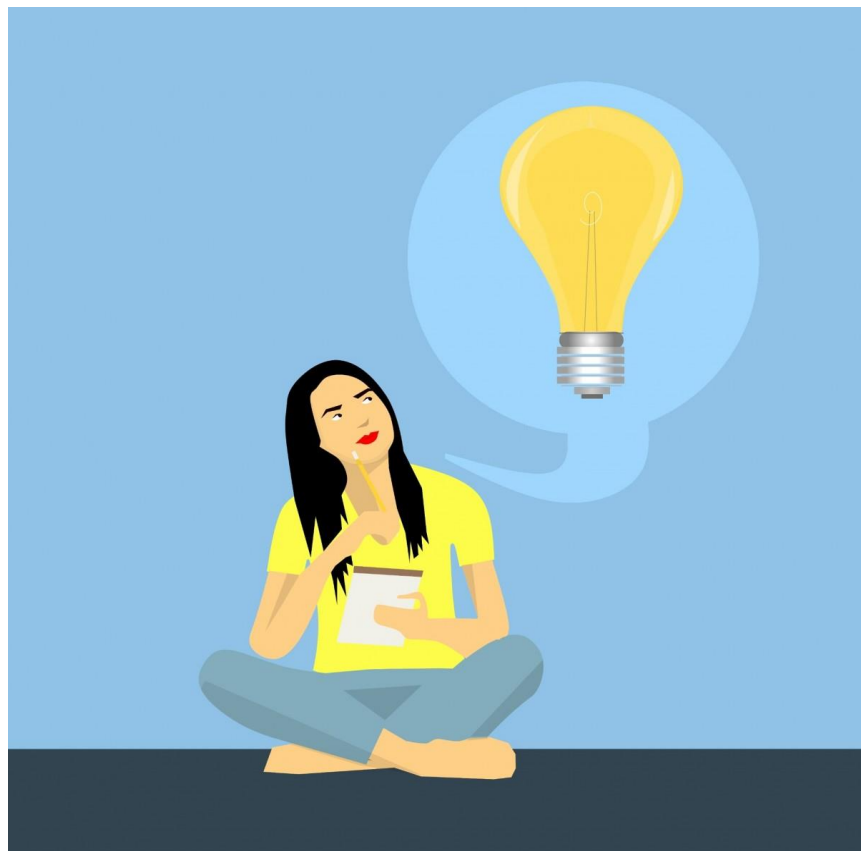
We have tons of resources in our financial aid hub:

1. Recorded presentation
2. Powerpoints
  - ✓ FAFSA/WASFA
  - ✓ FSA ID
  - ✓ WASFA Account
3. Screen-by-screen guides of FAFSA and WASFA (English & Spanish)
4. Handouts:
  - ✓ Required documents
  - ✓ Special circumstance appeals
  - ✓ Tax and financial information

**Once you log off, you will receive a link to complete a survey. Please take 5 minutes to respond and help us improve our presentation.**

**WE WILL SEND YOU ACCESS TO OUR FINANCIAL AID HUB AS SOON AS WE RECEIVE YOUR SURVEY RESULTS.**

# Questions? Comments? **Help?**



Maria Rebecchi

Director, Scholarships & Financial Aid  
Education

College Success Foundation

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Trang Tran

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