2023-24 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. Pay attention to the orange bubble
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

<table>
<thead>
<tr>
<th>FAFSA</th>
<th>WASFA</th>
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<tbody>
<tr>
<td>• U.S. Citizens</td>
<td></td>
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<tr>
<td>• U.S. Nationals (American Samoa or Swains Islands)</td>
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<tr>
<td>• U.S. Permanent Residents</td>
<td></td>
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<tr>
<td>• I-94 Holders: Refugee, Asylum granted, Cuban-Haitian Entrant, Conditional entrant, Parolee</td>
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<td>• Visa Holders under VAWA</td>
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<tr>
<td>• T or T-1 Visa Holders</td>
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<tr>
<td><strong>Applies for federal and state aid</strong></td>
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</tr>
</tbody>
</table>

**OR**

| **Undocumented students**  |
| **Students with DACA (expired or not)**  |
| • Other non-citizens** (check w/ individual college/university)  |
| • Defaulted/balance on federal loans/grants  |
| • Students who don’t feel comfortable completing the FAFSA  |
| • Other reasons  |
| **Applies for state aid**  |

*Must meet SB 5194* requirements for in-state tuition & in-state financial aid

*Source: https://wsac.wa.gov/wasfa **Other ways to be resident: https://wsac.wa.gov/student-residency*
EXITS FOR FINANCIAL AID

02 Federal Financial Aid
05 State Financial Aid
07 Financial aid from your college or career school
10 Financial aid from nonprofit or private organizations
Types of financial aid

1. **Grants**
   - Free money.
   - Grants and scholarships are usually based on financial need and don’t have to be repaid.

2. **Loans**
   - 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. **Work-Study**
   - 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 1/1/2000?
- 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?

Check your answers!
2. Know what documents you will need

Tip:
- Report tax and benefits information from 2021
- Report account balances as of the day you complete application

You will need to compile these documents for the student AND parent(s), if student is dependent.
3. Review FAFSA/WASFA:
FASA ID/WASFA Account

FAFSA - [https://fsaid.ed.gov](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 SSN
• If parent doesn’t have SSN, do not get an FSA ID

WASFA - [https://wsac.wa.gov/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.

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!

Check your answers!
3. Review FAFSA/WASFA: VIP Dates

- **October 1**
- **As soon as possible**

**Tips:**
- **Do not sacrifice** accuracy to meet a deadline!
- 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: Landing Pages

**FAFSA**
https://fafsa.ed.gov

**WASFA**
https://wsac.wa.gov/wasfa
3. Review FAFSA/WASFA: Select the correct year

**Why is this important?** Because if you apply for the wrong year, you won’t receive financial aid!
3. Review FAFSA/WASFA: Sections

- **FAFSA**
- **WASFA**
3. Review WASFA: State Residency

Why is this important?
- It will determine your eligibility for in-state tuition and state financial aid.

Residency information:
1. High school diploma or equivalent doesn’t need to be earned in WA state.
2. The law now requires that a person must live in Washington for one year, or 12 consecutive months, prior to starting college.

Choosing “I will not meet eligibility” will open questions about DACA.
3. Review WASFA: DACA

Why is this important?
- It will determine your eligibility for state work-study

Answer “Yes” even if it has expired

**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?**
- 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

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

HS Seniors: Even if you have dual enrollment or taken college credits (i.e.; Running Start), you will choose this option.
3. Review FAFSA/WASFA: School Selection

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

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

<table>
<thead>
<tr>
<th>Scenario</th>
<th>You will select the following answer:</th>
<th>Heads up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to provide parent(s) info</td>
<td>☑ &quot;I will provide parent information&quot;</td>
<td>No follow up required</td>
</tr>
</tbody>
</table>
3. Review FAFSA/WASFA: Parent Scenarios

<table>
<thead>
<tr>
<th>Scenario</th>
<th>You will select the following answer:</th>
<th>Heads up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to provide parent(s) information</td>
<td>❑ “I am unable to provide parent(s) information”</td>
<td>- No EFC calculated</td>
</tr>
<tr>
<td></td>
<td>❑ “I have a special circumstances and I am unable to provide parent(s) information”</td>
<td>- Follow up with the financial aid office; supporting documentation required</td>
</tr>
<tr>
<td></td>
<td>❑ “I understand I must follow up with the financial aid administrator after I submit the FAFSA.”</td>
<td></td>
</tr>
</tbody>
</table>

- The following are examples of some special circumstances where you may submit your application without providing parental information:
  - Your parents are incarcerated; or
  - You have left home due to an abusive family environment; or
  - You do not know where your parents are and are unable to contact them (and you have not been adopted).
### 3. Review FAFSA/WASFA: Parent Scenarios

<table>
<thead>
<tr>
<th>Scenario</th>
<th>You will select the following answer:</th>
<th>Heads up</th>
</tr>
</thead>
</table>
| **Unwilling** to provide parent(s) information | ☐ "I am unable to provide parent(s) information"  
☐ "I do not have a special circumstance, but I am unable to provide information about my parent(s)" | - Very limited funding available  
- Some financial aid offices may consider an appeal if stepparent refuses to provide information.                                    |

- Not all situations are considered a special circumstance. The following are situations that would not be considered a special circumstance:
  - You do not live with your parents;
  - Your parents don't provide you with financial support;
  - Your parents refuse to contribute to your college expenses;
  - Your parents don't claim you as a dependent on their income tax return;
  - Your parents do not want to provide their information on your application.
3. Review FAFSA/WASFA: Parent Section

Since you have been identified as a dependent student, you will need to provide information about your parent(s). You must identify and report information about your parent(s) even if you don’t live with him or her. Use the following criteria to determine whose information you should report in the “Parent Demographics” and “Parent Financials” sections of the FAFSA® form:

- **My parents live together (married or unmarried).**
- **My parents are divorced or separated, and I live with one parent more than the other.**
- **My parents are divorced or separated, and I live with both parents equally.**
- **I was legally adopted.**

**Tip1:** Marital status AS OF THE DATE FAFSA/WASFA is completed

**Tip2:** Don’t try to guess!

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

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

- If parents are **living together**, report both parents' information
- If parents are **not living together**, report information about parent identified below
- If parents are **divorced and remarried**, report information about parent identified below and stepparent.

- 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**.

**Tip:**
It doesn’t matter who claims student on taxes. Number of parents and marital status have to match.
3. Review FAFSA/WASFA: Who lives at home?

### FAFSA

**Enter Information for Your Parents' Dependents**

1. **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.

### WASFA

**Parents' Household Number of Family Members**

1. 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 the 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.

**Parents' Household Number in College**

1. Indicate the number of people in your legal parents' household who will be college students between July 1, 2017 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 2017-2020, for a program that leads to a college degree or certificate.

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**Check your answers!**

- May include unborn child
- Live-in significant other unless receiving 50% of financial support
- Cannot include parents in number attending college
3. Review FAFSA/WASFA: Household information

Federal benefits
- Medicaid or Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance (SNAP)
- Free or Reduced-Price School Lunch
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
3. Review FAFSA/WASFA

How to enter financial information

- Family files taxes and it is eligible to use IRS Data Retrieval tool: 
  - Transferred electronically on FAFSA

- Family files taxes but it is NOT eligible to use IRS Data Retrieval tool:
  - Manually enter information on FAFSA or WASFA

- Family doesn’t file taxes:
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

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

Link to IRS

Look up tax data

Transfer to FAFSA
3. Review FAFSA: Data Transfer

You have successfully transferred your 2021 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA® form. 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 form.

What was your adjusted gross income for 2021?

Transferred from the IRS

Transferred tax information will not be viewable on FAFSA or SAR.
3. Review FAFSA/WASFA: Manually Entering Data

**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 7.

**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 46. If negative, enter a zero here.

What was your parents’ adjusted gross income for 2021?

*This amount is found on IRS Form 1040—line 11.*

$25,000.00

Enter the amount of your parents’ income tax for 2021.

*This is the total amount of IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero here.*

$4,500.00
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

- Un taxed 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 net worth of land, buildings, machinery, equipment, inventory, etc.
  - Business: Include net worth if family owns/controls less than 50% and has 100 or more full-time staff.
  - Properties - If you don’t live in it, report net worth.

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

<table>
<thead>
<tr>
<th>Owner</th>
<th>Report as</th>
<th>Treatment of Qualified Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependent Student</td>
<td>Parent asset (balance)</td>
<td>Not reportable</td>
</tr>
<tr>
<td>Parent of Dep Student</td>
<td>Parent asset** (balance)</td>
<td>Not reportable</td>
</tr>
<tr>
<td>Independent student</td>
<td>Student asset (balance)</td>
<td>Not reportable</td>
</tr>
<tr>
<td>Another family member or third party</td>
<td>Ignored</td>
<td>Report as untaxed income to the beneficiary*</td>
</tr>
</tbody>
</table>

*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

NEW  Demographic survey
3. Review FAFSA Signatures

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.
3. Review FAFSA Signatures
3. Review FAFSA Application status

My FAFSA®

STUDENT INFORMATION
Welcome to INDEPENDENT TESTER's application!

Current Application Status:

- Processed Successfully

Congratulations, your FAFSA form was successfully processed.

What Happens Next:
- Your FAFSA information was made available to the school(s) you listed on your FAFSA form.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

Original Application: Submitted on 10/01/2022; Processed on 10/18/2022
3. Review FAFSA

Student Aid Report

2023–24 Student Aid Report

Expected Family Contribution: 0

Based on the information we have on record for you, your Expected Family Contribution (EFC) is 0. You may be eligible to receive a Federal Pell Grant and other federal student aid. Your school will use your EFC to determine your financial aid eligibility for federal grants, loans, and work-study funds, and possible funding from your state and school.

Based on your EFC of 0, you may be eligible to receive a Federal Pell Grant of up to $6,895 for the 2023–24 school year provided you have not met or exceeded the lifetime limit established for the Federal Pell Grant program.
3. Review FAFSA

Student Aid Report

Heads up:
Here’s where you’d find information in case the student needs to make corrections or was selected for verification.
3. Review FAFSA
Student Aid Report

<table>
<thead>
<tr>
<th>STUDENT AID REPORT</th>
<th>ACKNOWLEDGEMENT</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>F211 2324</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023-2024</td>
<td>F211 2324</td>
</tr>
<tr>
<td>DATA RELEASE NUMBER (DHR): 2345</td>
<td></td>
</tr>
<tr>
<td>EXPECTED FAMILY CONTRIBUTION (EFC): 000000 C</td>
<td></td>
</tr>
</tbody>
</table>

Dear JOHN SMITH,

Your Student Aid Report (SAR) Acknowledgement summarizes the information you submitted on your 2023-2024 Free Application for Federal Student Aid (FAFSA).

Application Status (review the checked boxes)

- Your FAFSA appears to be complete. Review the data on pages 2 and 3. We may have assumed certain information to calculate your eligibility for federal student aid. We printed any assumptions we made and the word "assumed" for the items on the back of this page. If you need to make corrections, you can go to https://fafsa.gov and use your FSA ID to access your information or you can contact the financial aid office of one of the schools you listed on your application for assistance. The school(s) listed on your FAFSA will receive your information.

Federal Student Aid Eligibility (review the checked boxes)

The data submitted on your FAFSA is used to calculate your Expected Family Contribution (EFC), which is 000000.

The EFC is the amount of money that your family must provide. Rather, you should think of the EFC as an index that colleges use to determine how much financial aid you would receive if you were to attend their school. Financial aid may include grants (free funds that do not have to be repaid), work-study (paid part-time employment), and/or low-interest loans (borrowed funds that must be repaid). This award information will vary from college to college because the cost of attending each is different. Please note that your EFC is subject to change if you update or correct your FAFSA. For more information about the EFC and other sources of aid, go to StudentAid.gov.

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

- 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 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

Don’t forget to invite your parent!
3. Review WASFA: Invite Parent to Sign

- 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 into your student account and send a new invitation.
3. Review WASFA: Parent Receives Invite

Action Required – WASFA Parent Signature

wasfa@wsac.wa.gov

3:42 PM (13 minutes ago)

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 or 888-535-0747.

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**Washington Application for State Financial Aid (WASFA)**

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Student Name</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023-2024 WA Application for State Financial Aid (WASFA)</td>
<td>Sally Jones</td>
<td>Completed on 10/5/2018</td>
<td>📇</td>
</tr>
</tbody>
</table>
3. Review FAFSA/WASFA: Common Mistakes

We already covered:

- Not filing your FAFSA or WASFA...early!
- Submitting an incomplete or inaccurate application
- 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

**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

**Prepare dependency override:**
- Unable to locate parents
- Staying with family members/friends

**Prepare special circumstance appeal:**
- Changes in family income
- Unexpected/additional expenses

Prepare your petition using this tool: [https://formswift.com/swift-student](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

1. Complete your FAFSA or WASFA
2. Results sent to colleges & universities
3. Receive instructions on next steps
4. Respond promptly
5. Receive an award letter – Review carefully!
6. If offer is insufficient, consider appealing
7. Prepare your appeal or petition, gather documents, send to schools
8. Ask questions, discuss with adults, calculate your out-of-pocket costs
9. Accept or decline your financial aid offer

Repeat every year on October 1
DON’T FORGET! **FINANCIAL AID HUB**

We have tons of resources in our financial aid hub:

1. Recorded presentations
2. Powerpoints
3. Handouts:
   - Required documents
   - Special circumstance appeals

Questions? Comments? Help?

scholarshipservices@collegesuccessfoundation.org