# 2024-25 FAFSA For Staff – Part 1

Scholarships & Financial Aid Education College Success Foundation

# **TODAY'S PRESENTERS**



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# **OBJECTIVES**

1. Familiarize yourself with new terminology 2. Identity which application a student must complete 3. Determine a student's dependency status and their contributors 4. Summarize how the FSA ID is obtained 5. Explain what items are needed to complete the FAFSA 6. Understand major changes to the FAFSA 7. Describe the sections of the FAFSA for a student and a parent 8. Avoid common mistakes **9. Address individual circumstances 10.Prepare for next steps** Q&A College Success Foundation

# 1. FAMILIARIZE YOURSELF WITH NEW TERMINOLOGY

**SAI:** The SAI is Student Aid Index. The Student Aid Index is the output of a processed FAFSA and is used to determine a student's financial aid eligibility. The SAI is a student's approximate financial resources to contribute toward their education for one school year. A Student Aid Index can be a negative number, with -1,500 being the lowest SAI possible.

**FAFSA Submission Summary:** The FAFSA Submission Summary is the output document of a FAFSA form, which provides a summary of data reported on the form.

**Contributor:** A contributor is any individual required to provide information on a FAFSA. Contributors give consent and approval, via an FSA ID, for federal tax information and their signature, on a FAFSA form. Contributors can include the student, the student's spouse (if married), a biological or adoptive parent, or the parent's spouse. A contributor must have an FSA ID, which is used as a legally binding signature on the FAFSA and allows an individual to provide approval for their federal tax information to be used in determining the student's financial aid eligibility. All contributors must provide approval, regardless of their tax filing status.

**FII:** Federal Tax Information is the data and information related to paying federal taxes. This includes a tax return or return information that is received directly from the IRS or obtained through an authorized secondary source, such as the U.S. Department of Education (ED).

**FAFSA FTI Approval:** This is the formal approval granted by an applicant, and any applicable contributors, to the Department of Education for a given FAFSA cycle to retrieve and use FTI to determine the applicant's federal financial aid eligibility. FAFSA FTI approval also permits the redisclosure of FTI to an eligible institution (college), state higher education agency, or a designated scholarship organization for the application, award, and administration of student aid programs. An applicant and contributor (if applicable) must provide consent once each year. If FAFSA FTI consent is not provided, the student will not be eligible for any Title IV aid until the appropriate consent is provided.

# 2. IDENTIFY WHICH APPLICATION TO COMPLETE

OR

### FAFSA

- U.S. Citizens
- U.S. Nationals (American Samoa or Swains Islands)
- U.S. Permanent Residents
- I-94 Holders : Refugee, Asylum granted, Cuban-Haitian Entrant, Conditional entrant, Parolee
- Visa Holders under VAWA
- T or T-1 Visa Holders

### WASFA

- 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



If answered "No" to all questions

### PARENT(S) INFO REQUIRED

- Born before 1/1/2001
- Married
- Enrolled in graduate programs
- Dependents
- Actively serving in the U.S. armed forces (other than training)/Veteran

### **INDEPENDENT STUDENTS**

If answered "Yes" to any questions

### **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, self-supporting (7/1/2023)

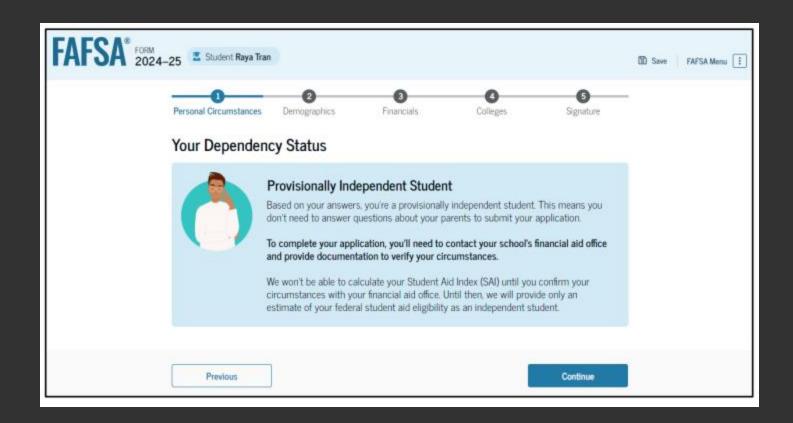
College Success Foundation

Check

your answers!

FAFSA <sup>®</sup> FORM 2024	-25 🖺 Student Raya Tran	Save FAFSA Menu 🔃
	1     2     3     4     5       Personal Circumstances     Demographics     Financials     Colleges     Signature	-
	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?	
	<ul> <li>A person experiencing unusual circumstances may have:</li> <li>Left home due to an abusive or threatening environment;</li> <li>Been abandoned by or estranged from their parents, and have not been adopted;</li> <li>Been granted refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country;</li> <li>Been a victim of human trafficking;</li> <li>Been incarcerated, or their parents are incarcerated and contact with them would pose a risk to them; or</li> <li>Been otherwise unable to contact or locate their parents, and have not been adopted.</li> </ul>	
	If their circumstances resulted in not having a safe, 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.	
	O Yes O No	
	Previous Continue	1

**College Success Foundation** 



Personal Circumstances	2 Demographics	3 Financials	Colleges	Signature	
Student Depen	dency Status				
	Dependent Studen Based on your answers, dependent students will information about their fin determine how much find	you're a dependent st help pay for your edu nances and backgrou ancial aid you're eligit	cation if they are able inds. This information	, we need	
Are the student's p unusual circumstan Select "Yes" if the stud	ect Unsubsidized arents unwilling to pro- nce that prevents then ent wants a financial a Unsubsidized Loan and	wide their informat n from contacting o id administrator at	or obtaining their pa	arents' information?	
O Yes		No			



BIOLOGICAL OR ADOPTIVE PARENTS <u>ONLY</u> (& stepparent married to contributor parent)



Grandparents, foster parents, legal guardians, older brothers or sisters, and aunts and uncles <u>are not</u> <u>considered parents</u> unless they have legally adopted the student <u>and their information should NOT be</u> <u>included in either FAFSA or WASFA</u>.

For dependent students, the parents', marital status, tax filing status, and living arrangements will determine who needs an FSA ID. For divorced or separated parents, the parent who provided the most financial support will be used on the FAFSA.

#### **BOTH Parents Need an FSA ID**

- Parents are married and filed their 2022 taxes separately
- Parent remarried and filed their 2022 taxes separately from spouse (stepparent must obtain FSA ID)
- Not married, but living together

#### Only ONE parent needs an FSA ID

- Parent is single, divorced, or separated
- Parents are married and filed jointly on their 2022 tax return
- Parent remarried and filed jointly with new spouse on their 2022 tax return

\*\*We HIGHLY RECOMMEND that parents who are married and filed jointly still obtain their own FSA ID

# 4. SUMMARIZE HOW THE FSA ID IS OBTAINED

### Go to https://studentaid.gov/fsa-id/create-account/launch, click on "Get Started"

#### Create an Account

Whether you're a student, parent, or borrower, you'll need to create your own account to manage the student loan journey.



Already have an account? Log In

#### What You Can Use Your Account For

- Filling out the Free Application for Federal Student Aid (FAFSA<sup>®</sup>) form
- · Signing your Master Promissory Note (MPN)
- Applying for repayment plans
- Completing loan counseling
- Using the Public Service Loan Forgiveness Help Tool

#### What You'll Need

- Social Security number
- · Your own mobile phone number and/or email address



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# 4. SUMMARIZE HOW THE FSA ID IS OBTAINED

Students and contributors must have the following available when signing up for an FSA ID:

- 1. Full name as listed on the Social Security Card
- 2. Social Security number
- 3. Date of Birth
- 4. Access to an active email address (each person must have their own)
- 5. A mobile phone that can receive text messages

For parents without a social security number:

- 1. Individual Taxpayer Number or ITIN (if available)
- 2. Full name as listed on ITIN (if available)
- 3. Items 4-5 from the list above

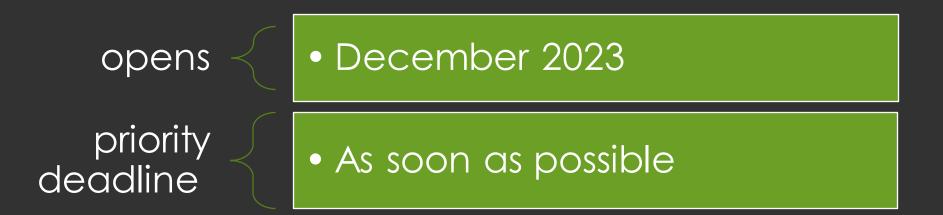
# 5. EXPLAIN WHAT ITEMS ARE NEEDED TO COMPLETE THE FAFSA

$\sim$	GATHER	THIS IN	IFORMA	ATION	
123-45-6789		TAX TAX	UNTAKED		$\sim$
123-45-0100	A# 123-456-789	EF			
ocial Security	Alien registration	Federal tax	Records of	Cash, savings, and	Investments other than the home in
umber	number	information or tax returns	untaxed income	checking account balances	which you live

#### Tip:

- Report tax and benefits information from 2022
- Report account balances <u>as of the day</u> students complete application

# 6. UNDERSTAND MAJOR CHANGES TO THE FAFSA



### Tips:

- **Do not sacrifice accuracy** for meeting a deadline!
- Make sure to check each school's financial aid office individual deadline.
- States have different deadlines as well.

# 6. UNDERSTAND MAJOR CHANGES TO THE FAFSA

- 36 questions
- Elimination of mobile application
- Gender, race, and ethnicity are optional
- Space for up to 20 colleges/universities
- Removal of the following questions:
  - Housing question on FAFSA (i.e., on campus, off campus, with parent)
  - Work Study interest question
  - College degree or certificate student is working on the question; grade level still on FAFSA
  - Dislocated worker question

# 6. UNDERSTAND MAJOR CHANGES TO THE FAFSA

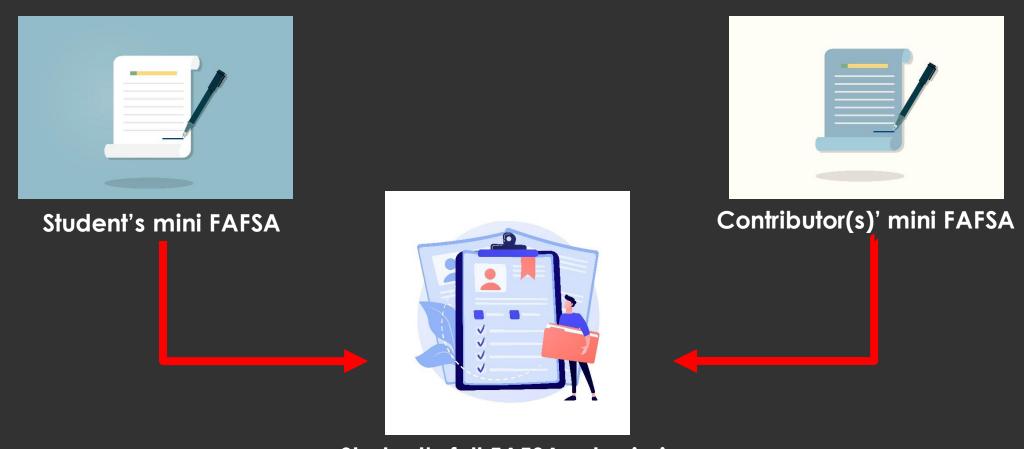
- New criteria for which parent to use on FAFSA for divorced/separated parents
  - Parent that provides more financial support instead of parent who student resides with most of the year
- Provisional Independent status determination:
  - Students who may qualify for a Dependency Override can submit a FAFSA to get an SAI but must still appeal with their Financial Aid Office (unusual circumstances)
- Unaccompanied Homeless Youth
  - Provide documentation of status, ED further defines what is acceptable
  - Status will carryover from year to year, no need to reverify status each year

 Special circumstances relate to students who submit an appeal related to finances (either reduction in income or increase in cost of attendance)

# 6. UNDERSTAND MAJOR CHANGES TO THE FAFSA

- All persons completing a FAFSA must agree to use the Federal Tax Information (FTI) or will not qualify for Federal Aid
   No clarification about who will be able to input tax information manually
- Families making \$60K or less will not have to report assets
- Families with small businesses and farms now need to report assets unless they make less than \$60K
- Child support received will be reported under assets
- Household size will come from tax return exemption information, though families can manually update it on the form
- Removal of untaxed income that is not reported on tax return

   Exception is child support received, which will be reported as an asset
- Removal of 529 plans owned by grandparent, uncle, aunt, etc.
- Removal of taxable Work Study earnings; schools now report work study earnings to ED for 2022



Student's full FAFSA submission

### FAFSA

#### https://studentaid.gov/h/apply-for-aid/fafsa



Why is this important? Because if students apply for the wrong year, they won't receive aid! College Success Foundation

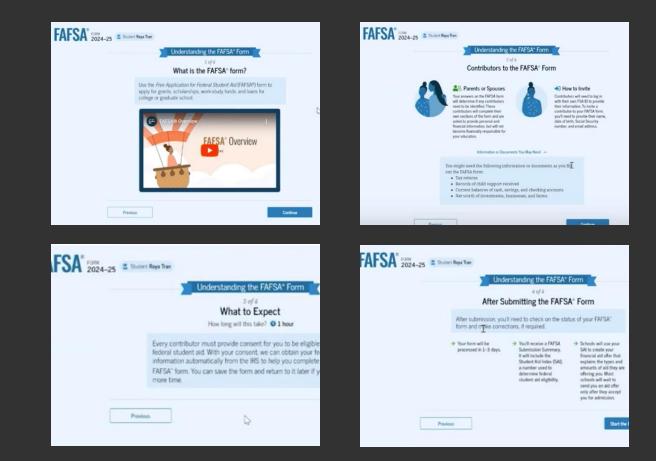
### **STUDENT SECTION**

Federal Student Aid rarsa - Loans & Grants - Repayment - Loan Fregiveness -	Q 🌒 🔒 Raya 🗸
FAFSA' 100M 2024-25	
Welcome, Raya,	
I am starting the FAFSA form as a	
Student 💟 Parent 🚔	
Previous	

### **STUDENT SECTION**

### Four pages of the FAFSA Overview

- Video and text explaining what the FAFSA is
- Explanation of a contributor and how to invite them to complete the FAFSA
- What students should expect in regards to Federal Tax Information
- Explanation of what happens after a FAFSA is submitted



### **STUDENT SECTION**

### Confirming student's information

- Identity: name, date of birth, social security number, email, and mobile phone number
- Permanent mailing address
- State of legal residence

Student Identity Information   Review the information below and verify that it's correct before moving forward.   Name   Raya A. Tran   Date of Brits   St/S2003   Social Security Riember   rayastrant/BytnalLcom   Modie Phone Number   (S5) S55-5555   To spdate this information for all CLS. Department of Zducation communications, go to Account Settings.			12345 Sesame Street
Name   Raya A. Tran   Date of Birth   S52003   Social Societ forwardser   •••••1234   Email Address   rayastrant@gmail.com   Modis Phose Number   (555) 555-5555    To update this tylemation for all U.S. Department of Education communications, go to Account Settings.	Student Identity Informatio	n	City
Name   Raya A. Tran   Date of Birth   \$502003   Social Society Number	Review the information below and ver	ify that it's correct before moving forward.	New York
Raya A. Tran   Date of Birth   3:5:2003   Social Security Number	Name		State
Systems     Securit Security Number       Securit Security Number     67891       Securit Security Number     Country       Enail Address     United States of America (US)       rayaatran@gmail.com     United States of America (US)       Models Phone Number     States of America (US)       (555) 555-5555     Previous			New York (NY)
acceleration serving marked         ••••• 2234         Email Address         rayastran@gmail.com         Modele Phone Number         (555) 555-5555         To sipdate this information for all U.S. Department of Education communications, go to Account Settings.         Previous			Zip Code
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Previous			
FAFSA <sup>®</sup> 1000 2024-25 Z Student Rays Tran	To spdate this information for all U.S. Depar	tment of Education commanications, go to Account Settings.	Previous
FAFSA <sup>®</sup> 20024-25 Content Rays Time 00 Save   AVISA Merce 1			
	FAFSA	0024-25 🚨 Student Rays Tran	then FAFTAMene
		State	

Date the Student Became a Legal Resident of New York (NY)

Previous

Check

your answers!

### **STUDENT SECTION**

Consent to Federal Tax Information (FTI) using direct data exchange with the IRS.

Remember, this is not optional.

Students are only eligible for federal financial aid if they consent.

#### Provide Consent or Be Ineligible for Federal Student Aid

#### Summary

FAFSA" FORM 2024-25 Student Rays Tan

Your consent is needed to retrieve and disclose federal tax information (FTI). With your consent, we can obtain tax return information automatically from the IRS to help you complete the FAFSA<sup>8</sup> form. If you don't provide consent, you will not be eligible for federal student aid, including grants and loans. You must provide consent even if you didn't file a U.S. federal tax return or any tax return at all.

- → Get your 2022 tax return information for the 2024–25 FAFSA form.
- Tax return information is required to complete the FAFSA form.
- FTI is used to determine your eligibility for federal student aid.

Under penalty of law, I certify that I am the individual associated with the FSA ID log-in credentials used to access the FAFSA form to provide the necessary approval and consent for the disclosure and use of my federal tax information (FTI) from the U.S. Department of the Treasury. By accepting below, I approve and consent to:

- The U.S. Department of Education to disclose my Social Security number, last name, and date of birth to the U.S. Department of the Treasury in order to obtain my FTI only for the purpose of determining the eligibility for, and the amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program authorized under subpart 1 of Part A, Part C, or Part D of Title IV of the Higher Education Act of 1965, as amended.
- The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 6103(I)(13)), only for the purpose of determining the eligibility for, and amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program authorized under Title IV of the Higher Education Act of 1965, as amended.

D Save FAFSA Manu 1

### **STUDENT SECTION**

#### An FAQ is provided explaining FTI consent.

Frequently Asked (	Juestions	
Who should provide consent?	Ð	0
Everyone must provide consent, even if you didn't file at all. We need your consent for you to be eligible for fe loans. Plus, providing consent reduces the time it take FAFSA form. By electronically importing your tax infor the most up-to-date data.	ederal student aid, including go s to fill out the financial section	rants and n of the
If I'm married and didn't file a joint tax return with my to provide consent for you to access their tax information of the second seco		zse have ⊙
What happens after I provide consent?		$\odot$
What happens if I revoke consent?		9
What happens if I decline consent?		$\odot$

### Message is given if a student does not consent.

### The Student Will Be Ineligible for Federal Student Aid

You did not agree to the terms on this page. The student will not be eligible for federal student aid, including grights and loans, if you don't agree to the terms.

Select "Provide Consent" to provide your consent.



### **STUDENT SECTION**

### Section 1: Personal Circumstances

- Marital status
- College or career school plans

erso	al Circumstances Demographics	Financials
tuc	dent Current Marital Status	
0	Single (never married)	
0	Married (not separated)	5
0	Remarried	
0	Separated	
0	Divorced	
0	Widowed	

Personal Circumstances Demographics	3 Financials	Colleges	Sig
Student College or Career Scho		11 H. J	
When the student begins the 2024–25 set     First Year (freshman)	chool year, what w	nii their college gra	de Ievel D
Second Year (sophomore)			
Other undergraduate (junior year and beyond)			
College graduate, professional, or beyond (MA, MBA, MD, JD, PhD., EdD, etc.)	E.		
When the student begins the 2024-25 set	chool year, will the	ey have their first ba	chelor's o
	O No		

### 7. DESCRIBE THE SECTIONS OF THE FAFSA FOR A STUDENT AND A PARENT Student Other Circumstances (2) self-supporting and at risk of being homeless?

### **STUDENT SECTION**

#### Section 1: Personal Circumstances

- Former "dependency • questions"
- Homeless or unaccompanied youth
- Unusual circumstances •

25	Student Raya Tran	B Se	
	0 0 0 0	-	C
	nal Circumstances Demographics Financiais Colleges Signature dent Personal Circumstances		
	all that apply.		C
	The student is currently serving on active duty in the U.S. armed forces for purposes other than	η Π	C
	training.		
	The student is a veteran of the U.S. armed forces.	ļ	
	The student has children or other people (excluding their spouse) who live with them and receive more than half of their support from the student now and between July 1, 2024 and June 30, 2025.		St
	At any time since the student turned 13, they were an orphan (no living biological or adoptive parent).		1
	At any time since the student turned 13, they were a ward of the court.		A s
	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.		ft
	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.	1	:01 1N
	None of these apply.		(

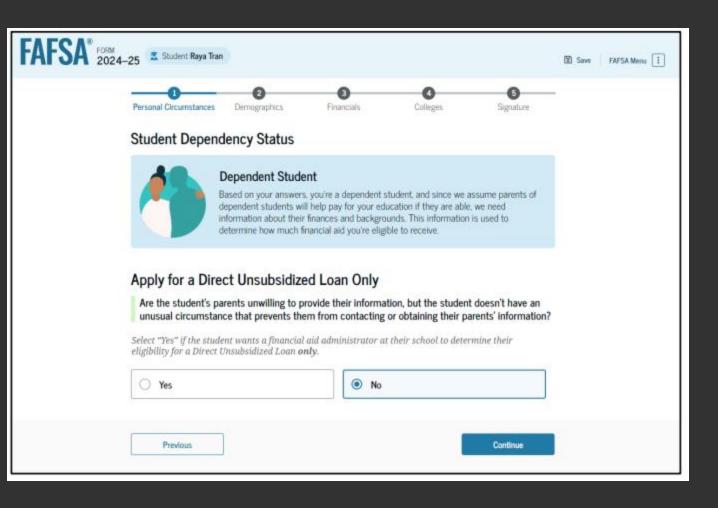
At any time on or after July 1, 2023, was the student unaccompanied and either (1) homeless or

	Yes     No
<u>ت</u>	Did any of the following determine the student was homeless or at risk of becoming homeless? Select all that apply.
Colleges Signature	Director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving those experiencing homelessness
สามารถหนัง รายสามารถหนัง	The student's high school or school district homeless liaison or designee
	Director or designee of a project supported by a federal TRIO or GEAR UP program grant
the U.S. armed forces for purposes other than	Financial aid administrator (FAA)
	None of these apply.
5.	
ling their spouse) who live with them and receive	Student Unusual Circumstances This information will help us evaluate the student's ability to pay for school.
ling their spouse) who live with them and receive now and between July 1, 2024 and June 30, 2025.	
ing their spouse) who live with them and receive now and between July 1, 2024 and June 30, 2025. re an orphan (no living biological or adoptive parent).	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 I left home due to an abusive or threatening environment;
ting their spouse) who live with them and receive now and between July 1, 2024 and June 30, 2025. ere an orphan (no living biological or adoptive parent).	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         I left home due to an abusive or threatening environment;         • are abandoned by or estranged from their parents and have not been adopted;         • have refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country;         • are avictim of human trafficking;
ing their spouse) who live with them and receive now and between July 1, 2024 and June 30, 2025. The an orphan (no living biological or adoptive parent).	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 and have not been adopted;         • have refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country;
s. ding their spouse) who live with them and receive t now and between July 1, 2024 and June 30, 2025. ere an orphan (no living biological or adoptive parent). There a ward of the court. ere In foster care. nor, as determined by a court in their state of th someone other than their parent or stepparent, as	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 I left home due to an abusive or threatening environment; are abandoned by or estranged from their parents and have not been adopted; 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

### **STUDENT SECTION**

#### Dependency status confirmed

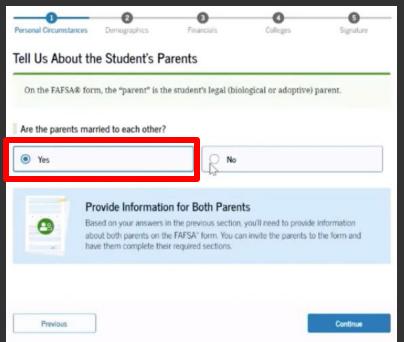
Allows students to continue to apply if parents are unwilling to provide their information. Students in this scenario will only qualify for Unsubsidized Loans.



### **STUDENT SECTION**

### Section 1: Personal Circumstances Asking for parent information using a decision tree

#### **Married Parents**



#### **Single Parents**

⊖ Yes	No	
Do the parents live together	?	
⊖ Yes	No	
both parents provided an exa		on't support the stude
f both parents provided an exa inancially, select "No," and refe	ct equal amount of f ancial support or if they d er to the parent with be greater income or asset	on't support the stude
f both parents provided an exa inancially, select "No," and refe	ct equal amount of f ancial support or if they der to the parent with e greater income or asset	on't support the stud

#### Provide Information for This Parent Only



Based on your answers in the previous section, you'll need to provide information about only this parent on the FAFSA" form. You can invite this parent to the form and have them complete their required sections.

#### **Parent and Step-Parent**

O Yes	No
Do the parents live together?	
O Yes	No
Did one parent provide more financial support of both parents provided an exact equal amount financially, select "No," and refer to the parent w	of nancial support or if they don't support the stude
○ Yes	No

stepparent to the form so they can complete their required sections.

### **STUDENT SECTION**

#### Invite Parent(s) to This FAFSA<sup>®</sup> Form



#### We Need Information for One of Your Parents Now

Based on your answers in the previous section, you'll need to provide information about both of your parents on your FAFSA" form. This does not make them financially responsible for your education. Right now, you can invite one or both of your parents to your form and have them complete their required sections.

#### Parents' information will be requested

- Name •
- Date of birth •
- Social Security Number •
- Email address

Tip: If possible, have parents present when this section is being completed to ensure accuracy

#### Enter information about the parent(s) identified on the prior page, and we'll send emails on your behalf.

Provide the parent's full legal name as it appears on their Social Security card. The email does not have to be the same as their account username and password (FSA ID).

Parent	Other Parent optional		
First Name	First Name		
1/2 <sup>2</sup>			
ast Name	Last Name		
Date of Birth Month Day Tear	Date of Birth Month Day Fear		
ocial Security Number (SSN)	Social Security Number (SSN)		
Hide ①	Hide		
My parent doesn't have an SSN.	My parent doesn't have an SSN.		
mail Address	Email Address		
onfirm Email Address	Confirm Email Address		
Send Invite	Send Invite		

Check

your answers!

### **STUDENT SECTION**

### Section 2: Demographics

Race

#### Gender

tudent Demographic Informat	tion
Questions Used for Research Purposes Your answers will not affect the student's eligibility for fee be used in any calculations, and be shared with the schools to which	
What is the student's gender?	
Female	OPTIONAL
Nonbinary or another gender	
Prefer not to answer	
Is the student transgender?	
) Yes	0 No
Prefer not to answer	

White	
German	
Irish	
English	
Italian	
Polish	
French	
other, enter race or origin.	
I	1
Black or African American	

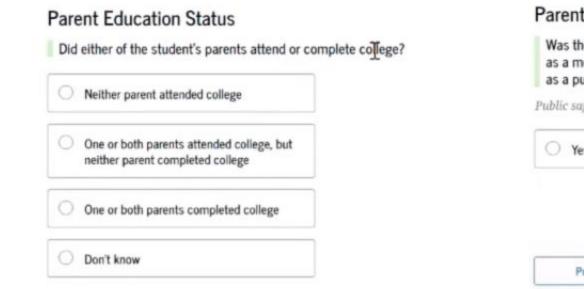
#### Citizenship

ersonal Circumstances	Demographics
tudent Citizer	nship Status
U.S. citizen or n	ational (http://www.com/ational/ational/ational/ational/ational/ational/ational/ational/ational/ational/ational
Eligible noncitia	zen
Neither U.S. citi	izen nor eligible nonci

### **STUDENT SECTION**

**Section 2: Demographics** 

#### **Additional Parent Questions**



#### Parent Killed in Line of Duty

Was the student's parent or guardian killed in the line of duty while either (1) serving on active duty as a member of the armed forces on or after the events of 9/11, or (2) performing official duties as a public safety officer?

Public safety officers include law enforcement officers, firefighters, and emergency service workers.

Previous		Continue

### **STUDENT SECTION**

Section 2: Demographics

State			
Alaska (AK)	×		
City			
Belen	×		
High School Name - optional			
	0		
Q, Search			
	to this application, cho	ose a school from the foll	owin
select "Continue.			
Search Results 1 to 1 of 1			
	-Z		
	-Z		
	-Z	ß	

#### Student High School Completion Status

What will the student's high school completion status be at the beginning of the 2024–25 school year?

<ul> <li>State-recogniz (e.g., GED cert</li> </ul>	zed high school equivalen tificate)
Туре	
	v
State	5
	v
~	
Homeschoole	d

### **STUDENT SECTION**

### Section 3: Financials

ts Colleges following questions. orps Benefits Reported a benefits. These usually ap	
orps Benefits Reported a	
orps Benefits Reported a	
a a	
a a	

#### Student Assets Current Total of Cash, Savings, and Checking Accounts Don't include student financial aid 2 s .00 Current Net Worth of Investments, Including Real Estate Don't include the home the student lives in. Net worth is the value of the investments minus an debts owed against them. s .00 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. \$ .00

Federal School Code

G45783

065346

096882

809773

E89235

+ Select

+ Select

+ Select

+ Select

+ Select

### **STUDENT SECTION**

### Section 4: Colleges

**Brown University** 

Lehigh University

Arlington, Alaska (AK)

Northeastern University

Arlington, Alaska (AK)

Arlington, Alaska (AK)

Arlington, Alaska (AK)

**Rice University** 

**Rhodes** College

Arlington, Alaska (AK)

	0	0	
Personal Circumstances	Demographics	Financials	Co
Where should w Search and select coll			tion?
You can add up to 20 c	-		form.
童 0 out of 20 Scho	ools Selected View	Selected Schools	
Search by School Nan	ne Search by Sch	ool Code	
State			
Alaska (AK)		× ③	
City - optional			
Arlington		× ⑦	
School Name - optional			
	I	×	
Q, Search			

1. Search college by Name and location OR by School Code 2. Select college from search results

To		e the position of a school on	chools that you've selected to your list, use the up and down o	
	To be a the fin	st two positions. If you upd	n Connecticut, you must list an ate your school choices later, n	
		g an email to sfa@ctohe.or out of 20 Schools Selected	ġ.	
Sh	owing	1 to 10 of 12		
Shi	owing	1 to 10 of 12 University of California Northridge, CA	Federal School Code G03453	TRemove View Info

3. Confirm college selection and sort in order of preference

S Travis Tran



### **STUDENT SECTION**

### **Review FAFSA**

Take	a Moment To Review Before Signing	
	nd the sections below to review and edit the information you've ed before you sign your portion of the form.	
Studer	nt Sections	Expan
0	Introduction Personal Identifiers	
0	Section 1 Personal Circumstances	
0	Section 2 Demographics	
0	Section 3 Financials	

Personal Identifiers	0
First Name	→ Raya
Middle Name	$\rightarrow$ A
Last Name	→ Tran
Suffix	$\rightarrow$
Date of Birth	→ 5/5/2003
Social Security Number	→1234
Individual Taxpayer Identification Number (ITIN)	$\rightarrow$
Mobile Phone Number	→ (555) 555-5555
Email	ightarrow rayaatran@gmail.com
Permanent Mailing Address	ightarrow 12345 Sesame Street
City	$\rightarrow$ New York
State	$\rightarrow$ New York (NY)
Zip Code	→ 67891
Country	$\rightarrow$ United States of America (US)
State of Legal Residence	$\rightarrow$ New York (NY)
Legal Residence Date	→ 01/1990

contributor Section			
This Section is Shared With 2 Contributors			Manage Contributor Information
This FAFSA <sup>‡</sup> form is sl status of their section.		uals listed below. View	who you invited and the
Contributors	Role	Date Added	Status
Alcina Tran	Parent	07/13/2024	E invite Sert

Other Parent

a houte Sect.

### **STUDENT SECTION**

### Section 5: Signature

#### Personal Circumstances Demographics Financials Colleges Signature

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

- will use federal and/or state student financial 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.

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

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

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

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

#### Sign Your FAFSA Form

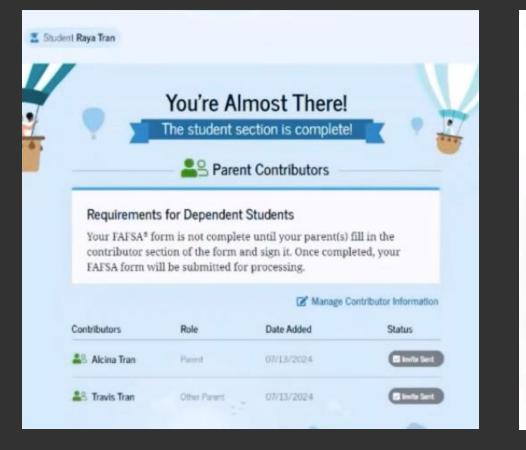
Cancel

🔁 I, Raya Tran, agree to the terms outlined above.

gr

### **STUDENT SECTION**

### 1<sup>st</sup> confirmation and next steps



#### Here's What You Can Do Next

#### Check Your Email

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

#### E Your FAFSA" Form Still Needs Contributor Information

The contributor(s) you selected will receive an email invitation to join your form every seven days until the application is complete.

#### 

View Your FAFSA" Submission Summary Once your application is complete and

submitted, you can view your FAFSA

Submission Summary, a summary of the information you provided on your FAFSA form. You'll be able to access the FAFSA

Submission Summary one to three days after you submit your application by logging back in with your account

username and password (FSA ID).

Questions About Your Eligibility For Aid?

Visit the "FAFSA Help" page for more information.

Get Help >

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

Provide Parent Information Manually >

#### Track and Manage Your FAFSA® Form

You can check the status of your application in the "My Activity" section of your StudentAid.gov account. We will let you know if we need anything more from you.

#### **College Success Foundation**

View Status

### **STUDENT SECTION**

### Sample confirmation page after parent completes their section



### **PARENT SECTION**

#### Communications sent to the parent to invite them to student's FAFSA

#### Alcina,

Raya T 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 Raya's education costs. Completing the FAFSA form is how they qualify for student aid including

- · Federal Pell Grants,
- · federal student loans,
- · 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 Raya? Read <u>Help topic title</u>.



#### Why You Were Invited

Without your input, Raya 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.

#### Can't Find Raya's Form?

Read help topic title.

### **PARENT SECTION**

### Accepting or declining invitation from student

#### My Activity

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

**Raya Tran** has identified you as a parent on their *Free* Application for *Federal Student Aid* (FAFSA<sup>®</sup>) form.

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

**Decline Invitation** 

#### Learn more

Accept Invitation

By accepting this invitation, you agree to share your Federal Student Aid account information. Once you accept, your personal and contact information will be linked to this form.

If you previously provided your consent to disclose Federal Tax Information (FTI) on another FAFSA form, accepting this invitation will transfer your consent to this form.

#### **Reconsider Declining Invitation**

If you decline to fill out the required information for Raya's form, they will be unable to obtain federal student aid to pay for school. If you understand this and still wish to decline this invitation, select "Decline Invitation."

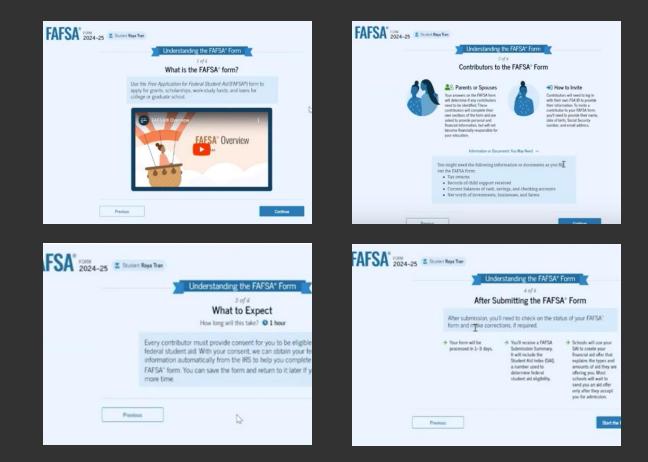
Decline Invitation

Go Back

### **PARENT SECTION**

### Four pages of the FAFSA Overview

- What is the FAFSA
- Who are the contributors
- What to expect
- After submitting FAFSA



### **PARENT SECTION**

### **Confirming Identity Information**

#### Parent Identity Information

Review the information below and verify that it's correct before moving forward.

Name

Alcina Tran

Date of Birth 5/5/1973

0,0,40.0

Social Security Number

•••-1234

Email Address alcinatran@school.edu

Mobile Phone Number

(555) 555-5555

To update this information for all U.S. Department of Education communications, go to Account Settings.

Permanent Mailing Address

Include apartment number.

12345 Sesame Street

City

New York

State

New York (NY)

~

Check

your

answers!

Zip Code

67891

Country

United States of America (US)

### **PARENT SECTION**

### **Providing Consent for Federal Tax Information**

#### Provide Consent or the Student Will Be Ineligible for Federal Student Aid

#### Summary

Your consent is needed to retrieve and disclose federal tax information (FTI). With your consent, we can obtain tax return information automatically from the IRS to help you complete your section of the student's FAFSA<sup>®</sup> form. If you don't provide consent, the student will not be eligible for federal student aid, including grants and loans. You must provide consent even if you didn't file a U.S. federal tax return or any tax return at all.

- → Get your 2022 tax return information for the 2024–25 FAFSA form.
- Tax return information is required to complete the FAFSA form.
- → FTI is used to determine the student's eligibility for federal student aid.

Under penalty of law, I certify that I am the individual associated with the FSA ID log-in credentials used to access the FAFSA form to provide the necessary approval and consent for the disclosure and use of my federal tax information (FTI) from the U.S. Department of the Treasury. By accepting below, I approve and consent to:

Frequently Aske	ed Questions
Who should provide consent?	$\odot$
If I'm married and didn't file a joint tax return with to provide consent for you to access their tax info	
What happens after I provide consent?	$\odot$
What happens if I revoke consent?	$\odot$
What happens if I decline consent?	$\odot$
	formation to determine the student's eligibility for federai ne," the student will not be eligible for federal student aid.
Previous	Decline Approve

### **PARENT SECTION**

### Section 1: Parent Demographics

Parent Current Marital Status	ent Marital Status
Single (never married)	ver married)

0	Unmarried	and	both	legal	parents	living
	together					

Married (not separated)

Remarried

Separated

Divorced

Widowed

#### Parent State of Legal Residence

State	
California (CA)	~ (

Date the Student Became a Legal Resident of California (CA)



### **PARENT SECTION**

**Section 2: Parent Financials** 

Federal	Benefits	Received	

Questions Don't Affect Federal Student Aid Eligibility

Your answers to these questions will not affect the student's eligibility for federal student aid or these federal benefits.

At any time during 2022 or 2023, did the parent or anyone in their family receive benefits from any of the following federal programs? ③

Select all that apply.

Earned Income Tax Credit (EITC)

#### Federal Housing Assistance

Refundable Credit for Coverage Under a Qualified Health Plan (QHP)	
Supplemental Nutrition Assistance Program (SNAP)	
Supplemental Security Income (SSI)	
Temporary Assistance for Needy Families (TANF)	
Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	
None of these apply.	

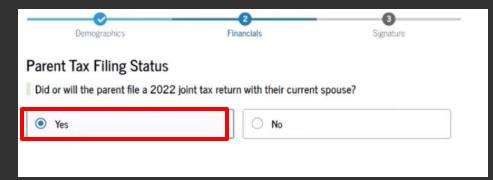
### 7. DESCRIBE THE SECTIONS OF THE FAFSA FOR A STUDENT AND A PARENT Check your onswers!

### **PARENT SECTION**

Section 2: Parent Financials

Demographics	Financials	Signature
Parent Tax Filing Status		
	2 joint tax return with their current	spouse?

If a parent is married and filed separately from a spouse, then the other parent or step-parent must complete FAFSA and obtain an FSA ID



If a parent is married and filed jointly with spouse, only one parent will complete the FAFSA

### **PARENT SECTION**

### Section 2: Parent Financials

#### Family Size

Is the parent's family size different from the number of individuals claimed on their 2022 tax return?

Yes
 No
 The parent's family size is 3
 Parent 1 Other Parent 1 Student 1 Parent's Children and Other Dependents: 1

 Enter the<sup>I</sup> number of children or other dependents who live with the parent and will receive more than half of their support from the parent between July 1, 2024 and June 30, 2025?

Do not include the student applicant.

	2	6
Demographics	Financials	Signature
Number in College		
How many people in the parent's 2025?	family will be in college between	July 1, 2024, and June 30,
Do not include the parent.		
	3	

Although the number in college no longer has an impact on eligibility, it is still being asked on the FAFSA

0

### **PARENT SECTION**

### Section 2: Parent Financials

Financials	Signature
mation	
nswer the following question	ons.
ne Tax Credit (EITC)?	
O No	
	nswer the following question ne Tax Credit (EITC)?

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

The parent paid taxes on these grants, scholarships, or benefits. These usually apply to those renewing their FAFSA<sup>®</sup> form, not to first-time applicants.



### **PARENT SECTION**

**Section 2: Parent Financials** 

#### Annual Child Support Received

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

.00

#### Parent Assets

S

Current Total of Cash, Savin	gs, and Checking Accounts
------------------------------	---------------------------

Don't include student aid.

s I	.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

.00

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

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

#### Important changes to 2024-25

- Those with an Adjusted Gross Income (AGI) less than \$60,000 do not report asset information. We are unclear if this will be a skip logic question.
- The net worth of a business is no longer limited to those with more than 100 full-time employees.
- The net worth of a farm now includes the value of a family farm. However, the value of a family's primary residence is still excluded.
- For dependent students, education savings accounts will only be counted as a parental asset if the account is designated for the student
- No clarification on how side hustles are treated in regards to business income, i.e., Etsy shop, gig jobs, waiting for FSA guidance

### **PARENT SECTION**

### Section 2: Parent Financials

Demographics	Financials
ner Parent's Information	
nter the following information about the	other parent.
<b>2</b>	
Other Parent	
First Name	
	1
Last Name	
Date of Birth	
Month Day Year	
Social Security Number (SSN)	

Other F irst Name	Parent		Che yo ansv
ast Name			8
	iear 💿		
ocial Security Numb I	er (SSN) Hide	0	
mail Address		<u> </u>	

### Check your answers!

### **Review FAFSA Information**

FORM 2024-25	Parent of Raya Tran	
Take	e a Moment To Review Before Signing	1
	and the sections below to review and edit the information you've red before you sign your portion of the form.	
Parent	t Sections	Expand All 🗸
0	Introduction Personal Identifiers	$\odot$
0	Section 1 Demographics	$\odot$

**PARENT SECTION** 

status of their section.		
	Shared With One Cont	fanage Contributor Information you invited and the
Signature		$\odot$
Section 3		
<ul> <li>Section 2</li> <li>Financials</li> </ul>		$\odot$

### **PARENT SECTION**

Section 3: Signature



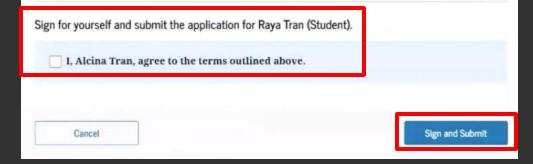
#### Sign and Complete Your Section

#### 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 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.



### **PARENT SECTION**

### **Confirmation and Next Steps**

### Congratulations,

the FAFSA\* Form Is Complete!

Raya Tran

Completion Date 10/12/2024

#### What Happens Next

#### Email sent

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

#### The Student Will Receive Notification of Processing

In one to three days, the student will receive a notification by email that their FAFSA form was processed and sent to the student's 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.

## 8. AVOID COMMON MISTAKES

✓ Not filing your FAFSA ...early!

Submitting an incomplete or inaccurate application

Errors in name, SSN, DOB

 Incorrect answers to student circumstances/dependency questions

✓ Not providing consent!

Wrong parent(s) marital status

Entering the wrong income information, if entering manually

College Success Foundation

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MISTAKFS

## **9. ADDRESS INDIVIDUAL CIRCUMSTANCES**

### Options for parents without a social security number:

- Parents with an ITIN can create an FSA ID using the ITIN
- Parents without an ITIN can still create an FSA ID online but will have their identity confirmed through TransUnion. Once identity is verified, the parent will receive an FSA ID
- The paper FAFSA will still be available for families who do not want to create an FSA ID but will still need to verify their identity. FSA has not announced exactly what that process
- Complete the WASFA instead of the FAFSA due to more anonymity

Please note that this process for parents without an SSN to obtain an FSA ID online has not been launched yet, and it is anticipated to be released later this fall.

## 9. ADDRESS INDIVIDUAL CIRCUMSTANCES

### Within the application: • Parents' marital status and taxes

### Within application AND gather documentation:

FORMS

**WITHIN** 

DDRESS

∢

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

ш OFFICI AID Γ 2 PEAL ∢ SUBMIT

# Prepare dependency override petition: Unable to locate parents Staying with family members/friends

## Prepare YOUR individual circumstances appeal:

Changes in family incomeUnexpected/additional expenses

## **10. PREPARE FOR NEXT STEPS**

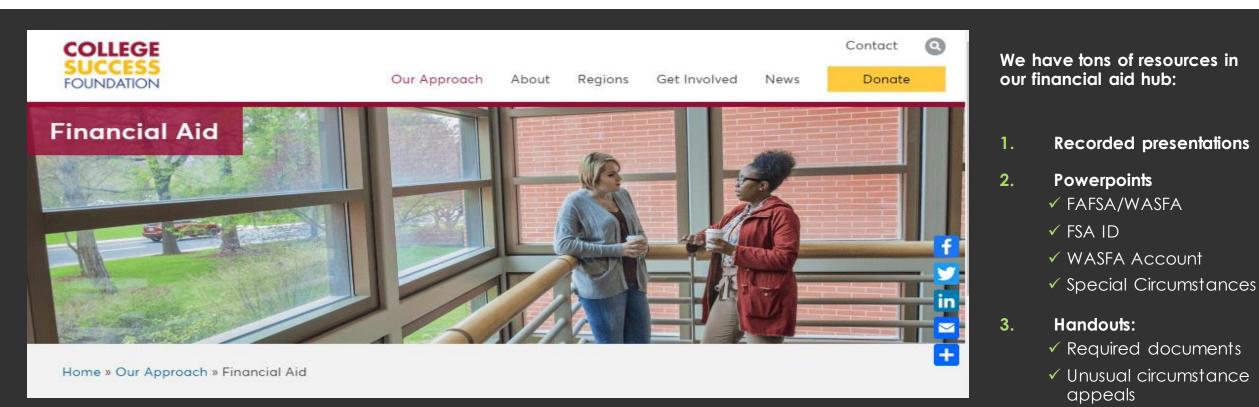
#### 1. Get <u>FAFSA Submission Summary</u>

- Within 3-7 days, the student's FASFA application will be processed
- Encourage students to :
  - Review answers for accuracy
  - Make corrections if necessary
  - Provide missing signatures if necessary

### 2. Contact their financial aid office

- There may be additional paperwork they need to complete
- Check email and student portal <u>regularly</u>. Respond <u>promptly</u> to any requests.
- Prepare petitions and gather documentation if the student fall under any of the scenarios we discussed in the previous slide.
- Consider appealing if your student has special circumstances.
- 3. Reapply every year on October 1 the FAFSA will return to this opening date for 2025-26

## DON'T FORGET! STUDENT FACING HUB



https://www.collegesuccessfoundation.org/our-approach/financial-aid/

## **QUESTIONS? COMMENTS? HELP?**



scholarshipservices@collegesuccessfoundation.org