

# FAFSA Financial Aid Toolkit

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## Before beginning the FAFSA:

- Create a FSA ID. Go to <https://studentaid.gov/fsa-id/create-account/launch> to create an FSAID. **Contributors and students must have separate FSAIDs.**
  - Gather the following documents for student and parents/contributors:
    - Social Security Number
    - Alien Registration Number (if you are not a U.S. citizen)
    - The most recent federal income return, w-2s, and other records of money earned
    - Bank statements and records of investments (if applicable)
    - Records of untaxed income (if applicable)
  - **The FSA ID is also your way to sign the application electronically.**
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- Go to the FAFSA website. <https://studentaid.gov/h/apply-for-aid/fafsa> and select “Start A New FAFSA”
  - Log in with your FAFSA ID (email address and password)
  - Select the academic year you plan to attend (2024 - 2025 August 2024 - June 2025).
  - If the student or your contributor needs to add or make changes to their information, they can access their section after the initial FAFSA has been processed.

## Student Sections

### Introduction: Personal Identifiers

- Under this section, information should already be filled in. This information was taken from your FSA ID.
- If any of this information isn't correct, make the necessary changes under settings on the Dashboard. Click your name on the top right corner.
- Go down to settings to make any necessary changes.
- If pre-filled information is correct, answer all questions that are not filled in.

## Provide Consent and Approval for the IRS:

- This question provides consent and approval/permission for Federal Student Aid to pull FTF (tax information from the IRS).

## Section 1: Personal Circumstances

- This section is determining if the student is dependent or independent. Student's marital status starts this section off.
- Next is the student eligibility section with questions about college grade levels and will the student have their first bachelor's degree before the beginning of the academic year on this application.
- Then there is a series of dependency questions i.e active in the military, does the student have children or will have children they provide more than half the children's support, since turning 13 in foster care, emancipated minor, or legal guardianship.
- Next is the homelessness question. (**Note: the school may ask for additional documentation**).
- Important question is the student completing the FAFSA for an unsub loan only. Many students answer this question incorrectly, so if they're a dependent student living with their parents, they should answer no to this question.

## Section 2: Student Demographics

- The first question in this section is the student's gender, then race and ethnicity. This question does have several different ethnicities, please click all that apply.
- Next is the citizenship question. If a student is an eligible noncitizen, please provide the alien registration number under this question.
- Next is the parent's education status and finally the high school completion question. Students will answer which high school they're graduating or graduated from. Enter the name, city and state where the high school is located.
- Then click search. The school should appear and click select.

## Section 3: Dependency Determination

If the student is determined to be dependent, then the application will move to the parent demographic information. If the student is determined to be independent then the application will move to the financial information section. **Please save your application again.**

## Section 3A: Dependent- Contributor Information

If the student is determined to be a dependent student, then here is the section where the contributor would provide their information.

- First question discusses the contributor's marital status.
- Next question discusses which parent information will be provided.
- Next is the parent's personal information such as social security number, last name, first initial of first name, and date of birth.
- **An accessible email address should be placed on the application.**

- Parents should use the same email address that was used to set up the FSA ID.

#### Section 4: Financial Information

In this section, the student will provide their financial information. Did the student file a 1040? Yes or no. Did the student have college grants, scholarships, or AmeriCorps reported to the IRS. Any foreign earned income exclusion. **Please save your application again.**

#### Section 5: College Selection

- This section focuses on the colleges you would like to receive your FAFSA application.
- You can add up to 20 schools. If you have the school's federal school code, you can put it in or search by the school's name.
- Once the school's information is available, click the select button to the right (If you click view selected school information, it will provide statistical information from College Navigator).
- **Please save your application again.**

#### Section 6: Sign and Submit

- The application is almost done, but there are a few more items to cover.
- At this point the application should be viewed to ensure all information is correct.
- Click expand all links to the right at the top. If something is incorrect, click on the question link next to the incorrect information and make changes.
- Then save your application again. Click continue to sign your application on the next screen.
- The student will need to put a check in the box next to your name and click the sign button.
- If the contributor has completed their section before the application is completely done, then the student will be signing and submitting the FAFSA.
- Next, the student will receive an email from Federal Student Aid stating "We've received your FAFSA form".
- Lastly, a FAFSA summary email will arrive within 72 hours with the FAFSA results along with Student Aid Index information.

## Parent/Contributor Sections

#### Introduction: Personal Identifiers

- Under this section, information should already be filled in. This information was taken from your FSA ID.
- If any of this information isn't correct, make the necessary changes under settings on the Dashboard. Click your name on the top right corner.
- Go down to settings to make any necessary changes.
- If pre-filled information is correct, answer all questions that are not filled in.

## Provide Consent and Approval for the IRS:

This question provides consent and approval/permission for Federal Student Aid to pull FTF (tax information from the IRS).

## Section 2: Contributor's Demographics

The first question in this section is the contributor's state of legal residence. Then any federal benefits the family received. Please check all that apply.

## Section 3: Financial Information

- In this section, the student will provide their financial information.
- Did the contributor file a 1040? Yes or no.
- Did they have college grants, scholarships, or AmeriCorps reported to the IRS.
- Any foreign earned income exclusion.
- Household size is next. Please include all children for which they provide more than half of their support. This number should also include any children that are in college as well. If the contributor is unsure of which family members to include, within the application they can click the household size button to get more information.
- Please save your application again.

## Section 4: Sign and Submit

The application is almost done, but there are a few more items to cover.

- At this point the application should be viewed to ensure all information is correct.
- Click expand all links to the right at the top. If something is incorrect, click on the question link next to the incorrect information and make changes.
- Then save your application again. Click continue to sign your application on the next screen.
- The contributor will need to put a check in the box next to their name and click the sign button.
- If the student has completed their section before the application is completely done, then the contributor will be signing and submitting the FAFSA.
- Next, the student will receive an email from Federal Student Aid stating "We've received your FAFSA form".
- Lastly, ***a FAFSA summary email will arrive within 72 hours with the FAFSA results along with SAI information.***