FAFSA Boot Camp Part II: The New FAFSA

October-December 2023
Today’s Goals

• Review past training and upcoming training
• Deep dive into the new FAFSA
  • Explore details to prepare students and parents to complete the form
  • Discuss possible conversations to have with families
  • Engage in reviews for learning
• For those who stay at the end we will have a drawing for a Amazon gift card

*Many of the following slides came from the National College Attainment Network (NCAN). Text and pictures have been adapted to fit the template provided by the USHE office.
Upcoming Training

Review FAFSA Training: [https://ushe.edu/k-12-outreach/ed-insights-k12/](https://ushe.edu/k-12-outreach/ed-insights-k12/)

Review recordings: [https://www.youtube.com/@utahcollegeaccess](https://www.youtube.com/@utahcollegeaccess)

Upcoming events to register for:

<table>
<thead>
<tr>
<th>Dates</th>
<th>Events</th>
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| Dec. 6<sup>th</sup> and 8<sup>th</sup> | How to Host a FAFSA Night  
6<sup>th</sup>: Advice for New FAFSA Night Planners  
8<sup>th</sup>: Discussion with FAFSA Night Experts |
| Jan. 3<sup>rd</sup> – 12<sup>th</sup> | FAFSA Boot Camp Part III: FAFSA Demo Practice with Case Studies |
| Jan. – Mar.    | Webinars:  
• Supporting Students with Disabilities  
• Supporting Undocumented Students  
• Supporting Students Facing Housing Insecurity |
Highlights—

FAFSA Boot Camp Part I: FSA ID Walkthrough

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

2. Parents without a Social Security Number will be able to create an FSA ID and electronically sign the FAFSA. However, this feature won’t be available until the updated FAFSA is released.

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

These students can and should complete the FAFSA

There are 3 important changes compared to the old FAFSA for undocumented parents:

• They will soon be able to create an FSA ID (option for those without an SSN)
• If they file taxes and have an Individual Taxpayer Identification Number (ITIN), they’ll be able to transfer their tax information over from the IRS
• They will be able to sign the FAFSA electronically
US Citizen Students with Undocumented Parents – Best Practices

• What do you do if a parent is hesitant about revealing their undocumented status on the FAFSA?
  • Reassure them that the Department of Education does not share information with immigration or customs enforcement agencies
  • If they have an ITIN, then the IRS already has most of their information already
  • If they do not want to create an FSA ID and electronically insert their information, they can submit a paper FAFSA
Paper FAFSA is back!

• The paper FAFSA will be available to print and mail in for certain students

• Paper FAFSA filers may include
  • Users who are having issues creating an FSA ID
  • Users who have contributors with issues creating an FSA ID
  • Incarcerated individuals with limited access to the internet

• Processing time for the paper FAFSA will be slower than those filed on studentaid.gov

• Even if the paper FAFSA has a wet signature, they will still need to confirm their identity
  • How identity will be confirmed is still unknown
More information to come on these items:

- FSA ID process for parents without a Social Security Number
- What the process will look like for manually inserting income and tax information on the electronic FAFSA
- If specific questions on the FAFSA will change based on feedback from the open comment period
- How to advise assessing the net worth of family farms and other small businesses
- How the new FAFSA will impact verification selection

These screenshots are not final and could change by the time the FAFSA is released in December 2023.
The New FAFSA: Prototype Self-Guide
FAFSA Prototype

The 2024–25 FAFSA Prototype URL:
http://fsapartners.ed.gov/fafsa-prototype/2425

Password: prototype2425
The New FAFSA: Introduction and Consent
There are 3 parts to the new FAFSA

1. Identification or Account (AKA FSA ID)

2. The FAFSA Form

3. The FAFSA Submission Summary
Old FAFSA Sections

New FAFSA Sections

Student –

Parent(s) –
FAFSA Landing Page

- Key features: this will automatically let students file the 2024-25 FAFSA Form
- If a student needs to complete the old FAFSA, they will have access to do that
Spanish Option
Roles

• If the student or parent tries to start the FAFSA without logging in, the FAFSA will require them to log in with their FSA ID

• Any parent wishing to work on the electronic FAFSA form will be required to log in with an FSA ID
Log In

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

• In Utah, to be a legal resident, you must live in the state for 12 consecutive months.
Parent State of Legal Residence

• The parent will also be asked about their state of legal residence. This does not affect the student’s aid eligibility.
Student, Parent, and Other Parent Provides Consent

- This page informs the student and parent(s) about consent and their federal tax information.

- By providing consent, the student’s federal tax information is transferred directly into the FAFSA form from the IRS to help complete the Student Financials section.

- That direct transfer is called the Direct Data Exchange (DDX).
Student, Parent, and Other Parent Provides Consent

• This page informs the student and parent(s) about consent and their federal tax information

• By providing consent, the student’s federal tax information is transferred directly into the FAFSA form from the IRS to help complete the Student Financials section

• That direct transfer is called the Direct Data Exchange (DDX)

• The student selects "Approve" to provide consent and is taken to the next page

• This consent agreement is nearly the same for the student as the parent
Consent is REQUIRED

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

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

Contributors:

- Student
- Student’s spouse
- Dependent student’s parent (biological/adoptive)
- Dependent student’s other parent (biological/adoptive/stepparent)
Items not covered in this section:

• The student identity information
  • Reviews the name, DOB, SSN, email, phone number, and address of the student
  • To adjust identity information, the student will need to go through their account settings on studentaid.gov (NOT on the FAFSA Form)
<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The student will only qualify for an unsubsidized student loan</td>
<td>0%</td>
</tr>
<tr>
<td>The student can still qualify for aid from the FAFSA</td>
<td>0%</td>
</tr>
<tr>
<td>The student will be ineligible for any aid on the FAFSA including loans</td>
<td>0%</td>
</tr>
</tbody>
</table>
Student Personal Circumstances
Dependency Status

• The following questions will determine if the student is considered “Dependent” or “Independent”

• **Dependent student**: MUST report information about their parent(s)

• **Independent student**: will only report information about themselves and NOT their parent(s)
Dependency Question #1

• This question is not listed on the FAFSA because it alludes to the Date of Birth of the student
• Is the student 24 or older as of January 2024?
• Students 24 or older are considered independent
Student Marital Status

Dependency question #2

- Students who are married/remarried are considered independent
Parent Marital Status

• Similar question is asked to the parents
Student College or Career Plans

- The student is asked about their college grade level for the 2024–25 school year and if they will have their first bachelor’s degree.
- All high school students, regardless of if they took Concurrent Enrollment or Dual Enrollment, will select “First Year” and “No” to the 1st bachelor’s degree.
- Dependency questions #3&4
  - If the student selects “College graduate...” or “Yes” to completing a 1st bachelor’s degree, they will be considered independent.
Student Personal Circumstances

• Dependency questions #5-12
  • If the student checks any of these boxes, they will be considered as independent
• If none of these options apply, dependent students should select “None of these apply”
<table>
<thead>
<tr>
<th>Checkbox</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>The student is currently serving on active duty in the U.S. armed forces for purposes other than training.</td>
</tr>
<tr>
<td></td>
<td>The student is a veteran of the U.S. armed forces.</td>
</tr>
<tr>
<td></td>
<td>The student has children or other people (excluding their spouse) who live with them and receive more than half of their support from the student now and between July 1, 20XX and June 30, 20XX.</td>
</tr>
<tr>
<td></td>
<td>At any time since the student turned 13, they were an orphan (no living biological or adoptive parent).</td>
</tr>
<tr>
<td></td>
<td>At any time since the student turned 13, they were a ward of the court.</td>
</tr>
<tr>
<td></td>
<td>At any time since the student turned 13, they were in foster care.</td>
</tr>
<tr>
<td></td>
<td>The student is or was a legally emancipated minor, as determined by a court in their state of residence.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
Dependency question number 13
At any time on or after July 1, 2023, was the student **unaccompanied** AND either
1. Homeless?
2. Self-supporting AND at risk of being homeless?
Student Unusual Circumstances

- Financial dependency question
- The student is asked if unusual circumstances prevent them from contacting their parent(s). The student selects “Yes.”
- Examples include...
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;
- are a victim of human trafficking;
- are incarcerated, or their parents are incarcerated and contact with the parents would pose a risk to the student; or
- are otherwise unable to contact or locate their parents and have not been adopted.

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

- Unusual circumstances will be followed up by the college
- The FAFSA can be signed and submitted
- Students will receive a **provisional** SAI
- SAI will be provisional until circumstances are verified (AKA verification)

**RECOMMENDATION:** Have students follow up with the colleges to see what documentation they will need to confirm their unusual circumstance
Dependency Results

• Based on the answers provided by the student, the FAFSA will notify them whether they are considered a dependent or independent student.

• The student is asked if they want a financial aid administrator to determine their eligibility for a Direct Unsubsidized Loan only.
  • This is an option if the student’s parents are unwilling to provide information.

• Multiple pop-up warnings will appear if the student selects “Yes.”
Impact of Provisionally Independent Status

• If the student answers “Yes” to any of the dependency questions, this will be the screen they will see

• These students will be considered a provisionally independent student and are not required to provide parent information

• The student is able to sign and submit their FAFSA form, but they will need to contact their college to see what supporting documentation they need to submit (aka Verification)

• A financial aid administrator at the college will review and make a determination regarding a dependency override

• Until the student’s circumstances are verified, Federal Student Aid will only provide the student an estimate of their federal student aid eligibility
Independent Student Differences

• Will see all questions dependent student sees
• Will need to answer the following questions in the independent student financial section
  • Family size (Yes/No)
  • Number in college
• If married:
  • student will need to invite the spouse to contribute if they did not file taxes together
  • if they file taxes together, the student will just need to provide general identifying information
Jake has been in the foster care system until he turned 14 when he was adopted by his current parents. Is Jake dependent or independent?

- Dependent: 0%
- Independent: 0%
Jane has grown up with her grandparents due to her parents being in and out of prison and having no contact with her parents. Is Jane considered dependent or independent?

- Dependent
  - 0%
- Independent
  - 0%
- We need more information about the adoptive state of the grandparents
  - 0%
Parent Questions: Dependent Students Only
Parent Information

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

Are the parents married to each other?
- If yes, provide information about both parents
- If no, next question

Do the parents live together?
- If yes, provide information about both parents
- If no, next question

Did one parent provide more financial support than the other parent over the past 12 months?
- If both parents provided an exact equal amount of financial support or if they don’t support the student financially, select “No” and refer to the parent with the greater income or assets in the next question.
- Yes or No, next question

Has the parent you identified in the previous question remarried?
- If yes, provide information for the parent and stepparent
- If no, provide information about this parent only
Dependent Student Invites Parents

- To invite the parent, the student must have the following information
  - First and Last Name
  - Date of Birth
  - Social Security Number (if applicable)
  - Email address

- If there is more than one parent involved, the student is only required to insert one of the parents’ information to move forward
Dependent Student Invites Parents

- To invite the parent, the student must have the following information:
  - First and Last Name
  - Date of Birth
  - Social Security Number (if applicable)
  - Email address

- If there is more than one parent involved, the student is only required to insert one of the parents’ information to move forward.

- Only one parent’s info is needed to progress through the form; the 2nd parent can be invited by 1st parent contributor if needed.
KEY GUIDANCE: Inviting Parents

• Parent invite must match
  • legal name
  • date of birth
  • SSN (if they have one) or mailing address (if they don’t have an SSN)

• Email address provided for contributors does not need to match the one used for the FSA ID

• Inviting matching issues need to be fixed by the student

RECOMMENDATION: Talk through parent wizard questions before starting the FAFSA
<table>
<thead>
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<th>Role</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Grandparents</td>
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</tr>
<tr>
<td>Aunts or Uncles</td>
<td>0%</td>
</tr>
<tr>
<td>Adoptive parents</td>
<td>0%</td>
</tr>
<tr>
<td>Legal Guardians</td>
<td>0%</td>
</tr>
</tbody>
</table>
Student Demographics
Items not covered in this section:

- Student’s Gender, Race, and Ethnicity questions
  - All questions do not affect aid, will not be shared to the colleges, and have a “prefer not to answer” selection
  - If students start the FAFSA, parents will not see the student’s answers

- Parent education status question, this is to help determine first-generation students

- Parent killed in line of duty

- Student’s high school completion status
Student Citizenship Status

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

• U.S. Citizens
  • Naturalized and born citizens

- Social Security Card required on the FSA ID
FAFSA Citizenship Terminology

• U.S. Citizens
  • Naturalized and born citizens

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

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

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

- Social Security Card required on the FSA ID
- Will need to provide their Alien Registration Number (A#) from an I-94 form or Green Card
FAFSA FAQs: Eligible Non-Citizens

Question:
• How would I know if a student is considered an “eligible non-citizen”?
• Can a student complete the FAFSA if they are an “eligible non-citizen”?

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

• U.S. Citizens
  • Naturalized and born citizens

• Eligible Non-Citizens
  • Students with documentation that Federal Student Aid considers “eligible” for federal aid
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  • Students with documentation that Federal Student Aid considers “ineligible” for federal aid or those without documentation
  • Categories include: Undocumented Students, those with DACA, TPS, DED, etc.
    - DACA: Deferred Action for Childhood Arrivals
    - TPS: Temporary Protected Status
    - DED: Deferred Enforced Departure
FAFSA FAQs: Ineligible Students

Question:

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

Answer:

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

**House Bill (HB) 144**
Utah law allows undocumented students to pay in-state tuition if the student:

- Attended a Utah high school for at least 3 years
- Has a Utah high school diploma or Utah GED
  - Submit a high school transcript with graduation date listed
- Signs and submits an HB 144 affidavit.

**House Bill (HB) 118**
- For students who are foreign nationals or legally admitted into the United States with F-1, H-4, or J-1 visas.

**House Bill (HB) 102**
- Provides earlier access to in-state tuition depending on the student’s immigration status.
Scholarship Lists and Databases for Ineligible Students

• University of Utah Dream Center: dream.utah.edu
• Salt Lake Community College Dream Center: slcc.edu/dreamcenter/
• Utah State University: usu.edu/financial-support/undocumented-student-resources
• Weber State University: weber.edu/undocumented/scholarships.html
• Utah Tech University: scholarships.utahtech.edu/non-resident-freshman-scholarships-2/
• Southern Utah University: suu.edu/diversity/undocumented-daca-resources.html
• Davis Technical College: davistech.edu/scholarships
• Utah Valley University: uvu.edu/studentaffairs/initiatives/
Tips for Assisting Families During FAFSA and Scholarship Events:

• Use Universal language

• Include instruction about undocumented students when discussing the FAFSA and/or scholarships in meetings, in instruction, and for advertising events

• Inform families early

• For those hosting events, have a place set up to have these conversations away from the main group, but don’t draw attention to them by leaving the room

• Maybe have information packets or some type of resource available for the family to know where to go.
FAFSA Citizenship Terminology

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  • Naturalized and born citizens

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  • Students with documentation that Federal Student Aid considers “eligible” for federal aid
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Student High School Information

**High School Information**

- From what high school did or will the student graduate?
  - **State**: New York (NY)
  - **City**: Brooklyn
  - **High School Name**: Brown High School

Search: Brown High School

Next: Continue

Previous: Previous
How would you help an undocumented student who is unable to complete the FAFSA?

- Inform them and their parent early in the school year of their inability to file the FAFSA, and provide alternative information
- Use universal language to teach all students FAFSA limitations (we cannot ask about citizenship status)
- Get them connected with a Dream Center or the undocumented resource website for their college
- Guide them on HB 144 and private scholarships that do not require citizenship
5-minute break
Return at 1:29pm
Student Financials
(Reminder, we are still waiting to hear more)
Student Tax Return Information

• If the student filed taxes, their IRS tax information should automatically be completed as long as they:
  • Created their FSA ID and had their identity processed – which takes 1-3 business days to process after successfully creating an FSA ID
  • Approved their consent

• If the student filed taxes but did not create an FSA ID in time, they will have to manually insert their tax information from their tax forms
  • After they have submitted the FAFSA and their FSA ID identity has been checked, the FAFSA will automatically transfer the IRS tax information and replace the inserted information

• If the student filed taxes but does not consent to the FAFSA agreement shown earlier, they will not qualify for any aid
Student Tax Return Information

• If the student did not file taxes but is considered dependent under their parents’ taxes, they will not need to worry about answering the tax questions

• Student and/or parent will never see any federal tax info that is shared via Direct Data Exchange (DDX)
  • Won’t be on form
  • Won’t be on the FAFSA submission summary

• The 2024-25 FAFSA will use 2022 tax information
Student Tax Return Information

- For student tax filers only two tax form questions will be asked
  - Taxable grants/scholarships
  - Foreign earned income exclusion

- Earnings from work will NOT be asked - this includes non-tax filers

- This question usually applies to those renewing their FAFSA form, not to first-time applicants.
Student Assets

• This is any cash on hand or at home, savings accounts, or checking accounts that belong to the student

• **Current** Net Worth...
  • Don’t include the home the student lives in
  • Net worth is the value of the investments minus any debts owed against them

• **Current** Net Worth of Businesses and Investment Farms
  • Enter the net worth of the student’s business or for-profit agricultural operation
  • Net worth is the value of the businesses or farms minus any debts owed against them
529s and the FAFSA

**Student Owner:** If the student owns the 529 (not a beneficiary but owner), you will insert the amount in the student’s assets – not common for HS

**Parent Owner:** If the parent owns the 529 and any other sibling 529s, you will insert all the amounts onto the parent’s assets

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

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

- If the student has other siblings that have custodial plans and the parent is the custodian, we do not need to insert the other sibling plans
True or False: The net worth of family farms and small family businesses must be reported on the FAFSA as an asset.

True

False
Student Colleges
Student College Search

- The student will be asked to search for the colleges and/or career schools they would like to receive their FAFSA information.
- Students can select to send their FAFSA information to a maximum of 20 schools.
- The order in which the schools are listed does not affect aid in Utah’s public colleges but might affect aid in private colleges or colleges outside of Utah.
Student Signature
Student Review Page

• The review page displays the responses that the student has provided in the FAFSA form

• The student can view all their responses by selecting "Expand All" or expand each section individually

• To edit a response, the student can select the question’s hyperlink and will be taken to the corresponding page

• Additionally, since the student invited their parent into the form, they see the parent contributor section and the status of their parent’s invite
Student Signature

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

• After agreeing and signing, the student is able to submit their section of the FAFSA form.

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

After agreeing and signing, the student is able to submit their section of the FAFSA form.

Since parent information has not been provided, the FAFSA form is not considered complete and can’t be processed yet.
Student Section Complete

- This page displays information for the student about next steps, including tracking their FAFSA form.
- The student is reminded that their form is not completed and can’t be submitted until the parent completes the contributor section of the form and signs it.
- Next, in this scenario, the student’s invited parent will enter the FAFSA form and complete the parent section.
- Students will see status of contributor invitations – FSA will automatically resend 7 and 14 days after.
- Incomplete FAFSA only stays in system for 45 days - after that, it is deleted.
<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>45 days</td>
<td>0%</td>
</tr>
<tr>
<td>4 weeks</td>
<td>0%</td>
</tr>
<tr>
<td>4 months</td>
<td>0%</td>
</tr>
<tr>
<td>45 minutes</td>
<td>0%</td>
</tr>
</tbody>
</table>
Dependent Student Parent(s) Communications
Help Complete [StudentFirstName]'s Form

[Contributor First Name],

[StudentFirstName] [StudentLastName] can't be eligible for federal student aid without your input. Help them complete the Free Application for Federal Student Aid (FAFSA®) form.

Providing information as a contributor does not make you financially responsible for [StudentFirstName]’s education costs. Completing the FAFSA form is how they qualify for student aid including:

- Federal Pell Grants,
- federal student loans,
- state financial aid, and
- school financial aid.

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

Note: Forms are deleted after 45 days of inactivity.

Don’t recognize [StudentFirstName]? Read [link to topic title].

Log in
Dependent Student’s Parent Log In

Log In

Email, Phone, or FSA ID Username

Password

Log In

Forgot My Username  |  Forgot My Password

Create an Account

Help Me Log In to My Account
Parent Status Center – My Activity

Your have been requested to be a Contributor on a FAFSA for Raya Tran.
The Free Application for Federal Student Aid (FAFSA) form helps students apply for federal grants, work-study, and loans.

- Decline Invitation
- Get Started

Borrower Defense Case #07688447
- Action Required
- Last Updated: 06/27/2022

PSLF Application
- Action Required
- Last Updated: 06/22/2022
This page provides information about being a contributor on a FAFSA form:

**Parent Contributing to the FAFSA® Form**

You have entered Raya Tran's FAFSA® form.

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

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**Frequently Asked Questions**

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

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

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

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

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

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**What do I need to complete my section(s)?**

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

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**What kind of information will I be asked to provide?**

You'll need to provide consent for the student to be eligible for federal student aid, including grants and loans. With your consent, we can obtain your federal tax information automatically from the IRS to help you complete your section of the student's FAFSA form. You'll also need to provide personal and financial information.

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**What happens after I complete my sections?**

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

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

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

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

(Reminder, we are still waiting to hear more)
### Parent Federal Benefits Received

Answers include:

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

**Diagram:**

The diagram shows a form titled "Federal Benefits Received" with options for various benefits.

- Earned Income Tax Credit (EITC)
- Federal Housing Assistance
- Free or Reduced Price School Lunch
- Medicaid
- Refundable Credit for Coverage Under a Qualified Health Plan (QHP)
- Supplemental Nutrition Assistance Program
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of those apply.
Parent Tax Filing Status

• If the parent filed taxes, verified their identity (FSA ID), and approved consent, then the tax information should automatically pull from the IRS.
Do you need to file taxes in order to qualify for aid from the FAFSA?

Yes
• If the family has an income **higher** than the threshold set by the [IRS Publication 17](https://www.irs.gov/publications/p17) – Page 6

No
• If the family's income is **lower** than the threshold set by the [IRS Publication 17](https://www.irs.gov/publications/p17) – Page 6
What if the student’s parents are undocumented and do not pay taxes?

• According to the National Immigration Law Center (NILC): “All wage earners—regardless of their immigration status—are required to pay federal taxes. The IRS provides ITINs to people who are ineligible for an SSN so that they can comply with tax laws.”

• Regarding the FAFSA, the student won’t qualify for any aid from the FAFSA until their parents file their taxes, regardless of their immigration status (for those parents who have an income higher than the IRS threshold). Those without an SSN will be given an Individual Taxpayer Identification Number (ITIN).

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

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

- The family size will be automatically answered if the DDX was successful in transferring their tax information.
- By selecting “Yes,” the parent can see what the family size is according to their taxes.
Parent Number in College

- Although this question exists, it will no longer influence the student’s Student Aid Index (SAI).
- Colleges can use it for a Professional Judgement (PJ) and for institutional aid.
Tax Return Information

• Even with consenting to DDX, tax filers will see a few tax questions on the form – including EITC, taxable grants/scholarships, foreign earned income exclusion

• Manual path will be presented for separated/divorced parents whose tax filing status is not an accurate reflection of marital status, those who experienced identify theft at the IRS, and undocumented individuals who do not file
Parent Assets

- Child support received will only need to be reported if required to report assets.
- Small business and family farm net worth needs to be reported if assets are required.
What's the name of the IRS document that shows the tax threshold to help me know whether or not a student or parent is required to file taxes?

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<thead>
<tr>
<th>Document</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>IRS 1040 Form</td>
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<td>IRS Publication 6</td>
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<td>W-2</td>
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<tr>
<td>IRS Publication 17</td>
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Other Parent, Review, and Signature
Other Parent Information

• The initial parent to log in will then provide the information about their spouse or partner to invite them to the form for consent if it is needed.

• For married parents who filed taxes as “Married Filed Jointly,” only one parent’s FSA ID and consent is required.
In this scenario, the parent can only view responses within the parent section of the student’s FAFSA form.

The parent can view all their responses by selecting "Expand All" or expanding each section individually.

To edit a response, the parent can select the question’s hyperlink to be taken to the corresponding page.
Other Parent Signature

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

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

If **parent** submits FAFSA

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

If **student** submits FAFSA

- Student will see full confirmation page on submission with SAI and estimated federal financial aid eligibility
FAFSA Submission Summary
• Upon completion, the student receives a FAFSA Submission Summary
• The FAFSA Submission Summary is broken into four tabs:
  • Eligibility Overview, FAFSA Form Answers, School Information, and Next Steps
  • At the top, the student will see information about when their form was received and processed
  • They also have the option to print their FAFSA Submission Summary to keep for their records.
Eligibility Overview

- On the Eligibility Overview tab, the student sees information about what federal student aid they may be eligible for, such as a Federal Pell Grant and Federal Direct Loans.
- Any amounts of financial aid that display on this tab are estimates and are not guaranteed.
- Final determination of the student’s financial aid eligibility is provided by their school’s financial aid office.
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- They are also able to view the Student Aid Index.
What you need to know about SAI

• Determined by family size, federal tax information, and assets reported on the FAFSA – Number in college does not impact SAI

• Can be as low as -1,500

• Students with SAI at 0 or below will be eligible for a full Federal Pell Grant; those with an SAI of 1 or above may have access to partial Pell

• Pell eligibility will be based on the SAI or the Federal Poverty Table – whichever is lower
FAFSA Form Answers

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

• On the School Information tab, the student sees information about the college(s) and/or career school(s) that they selected to send their FAFSA information.

• The student can compare the graduation rate, retention rate, transfer rate, default rate, median debt upon completion, and average annual cost of their selected schools.
Next Steps

- On the Next Steps tab, the student sees comments that pertain to their FAFSA form.
- Some comments may require the student to start a correction or send additional documentation to their school.
- Other comments may be informational and do not require any further action from the student.
KEY GUIDANCE: 
FAFSA Submission Summary

• Unclear where verification will show up – could show up next to SAI or Next Steps
• May need to explain negative SAI to students and parents
  • Negative SAI is the same as 0 when receiving Pell
• Make a correction is available within the FAFSA Submission Summary
• Sections that need attention will be labeled with a red exclamation point
• A complete printout will be available