

# A Deep Dive into the FAFSA®

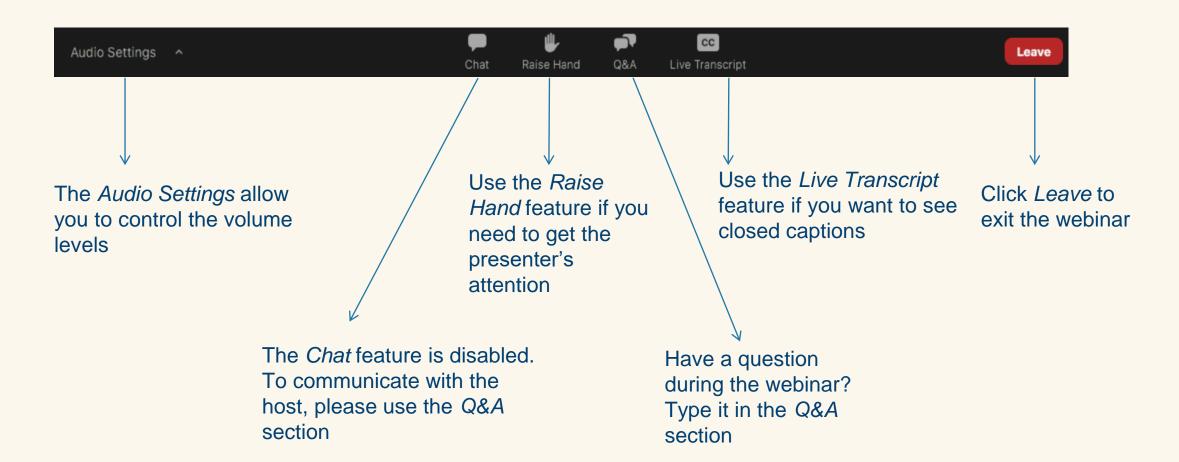
## **A MEFA Institute Webinar**



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How to Participate



About MEFA

State authority created by the Commonwealth of Massachusetts in 1982 helping families plan, save, and pay for college About the FAFSA

- Free Application for Federal Student Aid
- FREE form at <u>fafsa.gov</u>
- Required by all colleges/universities for federal & state (& some institutional) aid
- Opens by Dec 31, 2023
- Must be completed each year (one for every child in college)
- May have other financial aid applications required

- Contributor: Anyone who needs to provide information
- Each contributor has a section for that person to complete
- All income questions will pull answers from the federal tax return once consent is provided
- Contributors must provide consent for the student to receive federal financial aid
- Online skip logic removes questions not applicable
- Must answer all questions in order
- Tip: If an answer is zero or the question does not apply, enter 0
- Incomplete FAFSAs are **deleted** after 45 days; reminders are sent every 7 days

Items & Info Needed to Complete the FAFSA

- Student and parent(s) -Social Security number

  - -Date of birth
  - -Current bank statements
  - -Current business, farm, and investment records
- Certain families may need
  - -2022 federal income tax return for student and/or parent

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#### **FAFSA** Customer Service

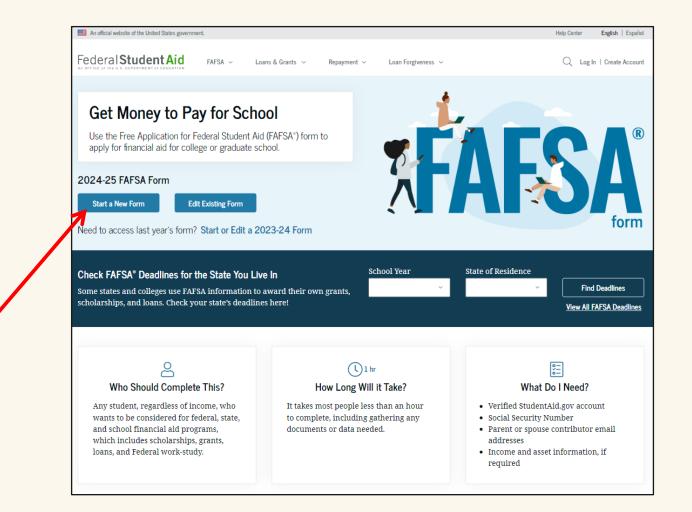
- Phone: (800) 4-Fed-Aid (433-3243)
- Email Form: Located at <u>studentaid.gov/help-center/contact</u>
- Chat: Located at <u>studentaid.gov/help-center/contact</u> (Chat option disappears if not available)
- Hours:
  - -Monday: 8 a.m.-9 p.m. ET
  - -Tuesday-Wednesday: 8 a.m.-8 p.m. ET
  - -Thursday-Friday: 8 a.m.-6 p.m. ET
  - -Saturday & Sunday: Closed
- Help Center tab at the top of each page leads to:
  - -Search
  - -Help Topics
  - -FAQs
  - -Link to contact information

## FSA ID

- A login: username & password
- Needed to start the FAFSA
- Who needs an FSA ID?
  - Student
  - Every parent listed on the FAFSA
    - If parents filed taxes jointly, only one parent needs one
- Must have an email address (students should use one they check)
- Requires personal information and setting up challenge questions
- Parents without an SSN will need to answer knowledge-based questions based on credit history
  - Won't be available until the FAFSA is ready
- Tell families to set up an FSA ID <u>NOW</u> at <u>studentaid.gov/fsa-id/create-account</u>
- Recommend MEFA's How to Create Your FSA ID webinar

## FAFSA Homepage

- Choose Start a New Form
- Several help boxes at the bottom



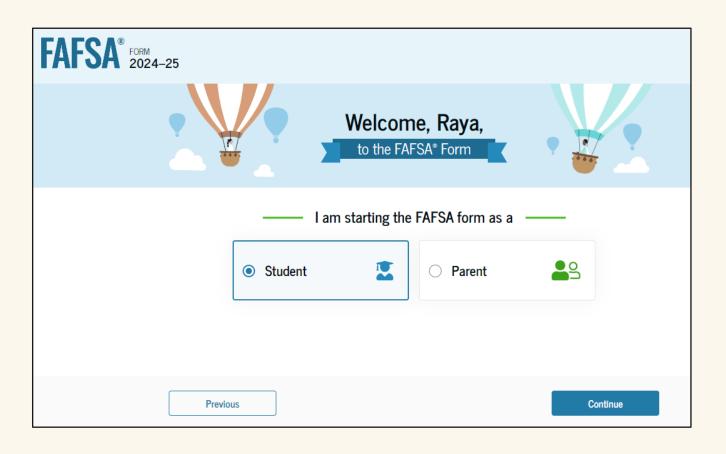
Log-In Page

- Must use an FSA ID to log in
- Select Create an Account to get an FSA ID

An official website of the United States government.		Help Center	Submit a Complaint	English   Español
Federal Student Aid	FSA® Form ∨ Loans and Grants ∨ Loan Repayment ∨ Loan Forgiveness ∨		Log In   Create Acco	unt Q
	Log In ↔			
	Email, Phone, or FSA ID Username test595011023			
	Password Show Password			
	Log In			
	Forgot My Username Forgot My Password			
	Create an Account			
	Help Me Log In to My Account			
Help Center I Contact Us I Site Feedback	About Us Announcements	s Data Cen	iter Resources	Forms Library
Federal Student Aid	ia.gov   vote.gov   ed.gov   Site Feedback			

Role

• Choose student or parent role



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### Overview Video

First of four onboarding slides



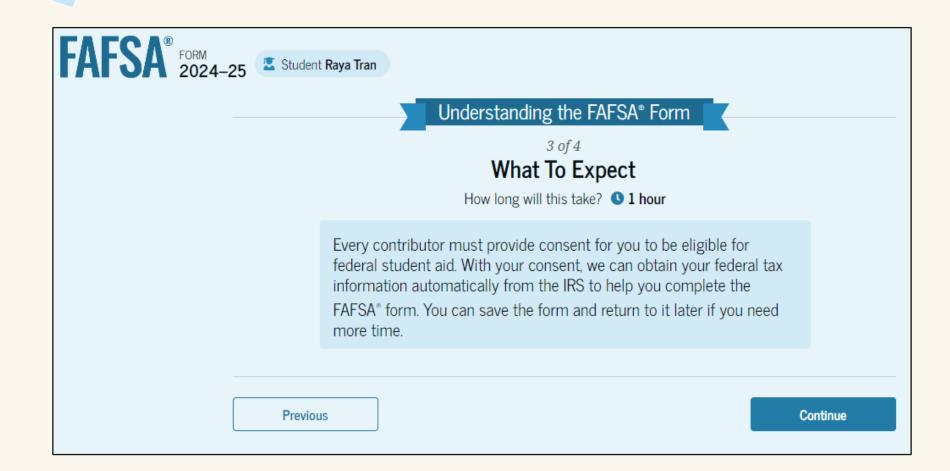
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#### **Defining Contributors**

- Explains concept of Contributor
- How to invite Contributors
- Information families may need to complete the FAFSA



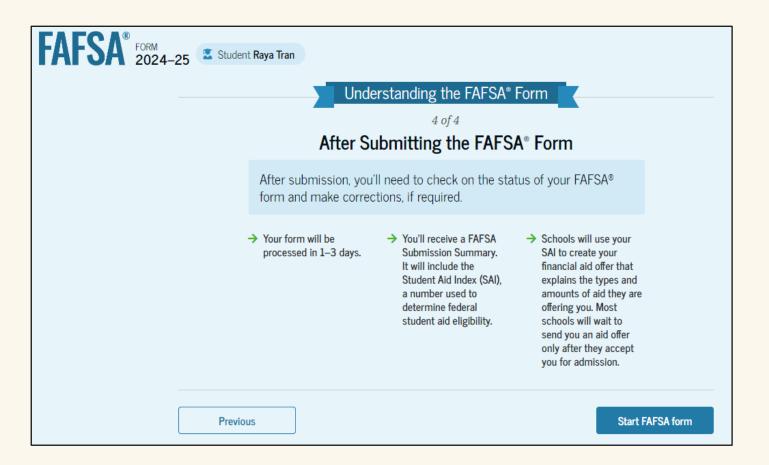
## Explaining Consent



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After the FAFSA

## Click Start FAFSA form to begin



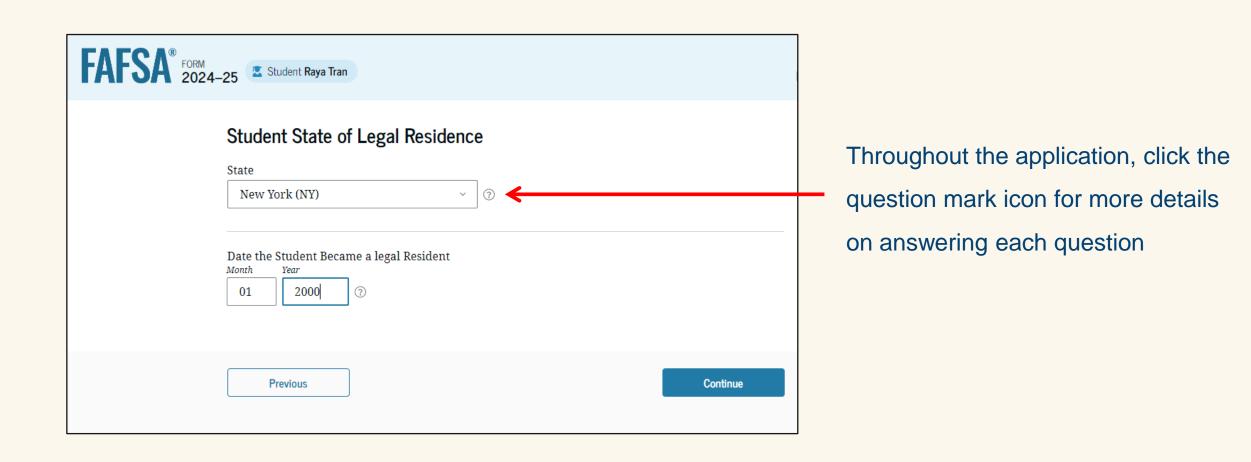
## Student Identity Info

- Student info from the FSA ID for review
- Any changes to info must be made under *Account Settings* on StudentAid.gov except mailing address, which can be corrected on the screen

FAFSA® FORM 2024-25 Student Raya Tran	🗑 Save	Permanent Mailing Address Include apartment number. 12345 Sesame Street
Student Identity Information Review the information below and verify that it's correct before moving forward.		City New York
Name Raya A. Tran		State New York (NY)
Date of Birth 05/05/1995		Zip Code 67891
Social Security Number		Country
Email Address rayaatran@gmail.com		United States of America (US) ~
Mobile Phone Number (555) 555-5555		Previous
To update this information for all federal student aid communications, go to Account Settings.		Previous



## State of Legal Residence



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## **Providing Consent**

- By providing consent, the Contributor allows the FAFSA to pull federal tax data directly into the FAFSA from the IRS
- Every Contributor MUST provide consent in order for the student to receive need-based federal aid
- Select Approve to provide consent

FORM 2024-25 Student Raya Tran	窗 Save FAFSA Menu (
Provide Consent or 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 the FAFSA <sup>a</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.            → Getyour 2022 tax return information for the 2024-25 FAFSA form.             → FTI is used to determine your eligibility for federal student aid.	
<ul> <li>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:</li> <li>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 suppart 1 of Part A, Part C, or Part D of Title IV of the <i>Higher Education Act of 1965</i>, as amended.</li> </ul>	
<ul> <li>The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 61030)(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 <i>Higher Education Act of 1965</i>, as amended.</li> </ul>	
<ul> <li>The U.S. Department of Education to redisclose my FTI received from the U.S. Department of the Treasury, pursuant to 26 U.S.C 6103(I)(13)(D)(iii), which includes:</li> </ul>	
<ul> <li>institutions of higher education participating in the federal student aid programs authorized under the <i>Higher Education Act of 1965</i>, as amended;</li> <li>state higher education agencies; and</li> <li>scholarship organizations designated prior to Dec. 19, 2019, by the Secretary of Education.</li> </ul>	
<ul> <li>The use of my FTI for the application, award, and administration of student aid awarded by the federal government, institutions of higher education, state higher education agencies, and designated scholarship organizations.</li> </ul>	
<ul> <li>The redisclosure of my FTI to any future 2024-25 FAFSA forms for which I elect to participate (e.g., if I elect to participate in my child's FAFSA form or to complete my own FAFSA form after participating in another FAFSA form). My FTI will be redisclosed to these additional applications upon my affirmation to participate. I understand that I may decline an invitation to participate, which will preven the transfer of my FTI to that FAFSA form.</li> </ul>	

### Personal Circumstances

Questions to determine if student is:

 dependent (needs to report parent information on the FAFSA)

## OR

independent (does not need parent data)



## Marital Status

- Married students are independent
- Separated students are not considered independent

FAFSA <sup>®</sup> FORM 2024–25 Student Raya Tran		🕃 Save 🛛 FAFSA Menu 🔃
Personal Circumstances Demographics Fit	3 4 nancials Colleges	5 Signature
Student Marital Status		
Single (Never Married)		
O Married (not Separated)		
C Remarried		
Separated		
Divorced		
Widowed		
Previous		Continue

College Plans

- Entering college students should select
   *First Year (freshman)*
- Students should make sure to select
   No when asked if they have a
   bachelor's degree
- Grad students are independent

FORM 2024-2	5 Student Raya Tran				명 Save FAFSA Menu :
	1 2 Personal Circumstances Demographics	3 s Financials	4 Colleges	5 Signature	
	Student College or Career When the student begins the 202		vill their college grade	e level be?	
	• First Year (freshman)				
	Second Year (sophomore)				
	Other undergraduate (junior or s				
	College graduate, professional, c (MBA, M.D., Ph.D., etc.)	or beyond			
	When the student begins the 202	4–25 school year, will the	ey have their first bac	helor's degree?	
	○ Yes	No			
	Previous			Continue	

#### Other Personal Circumstances

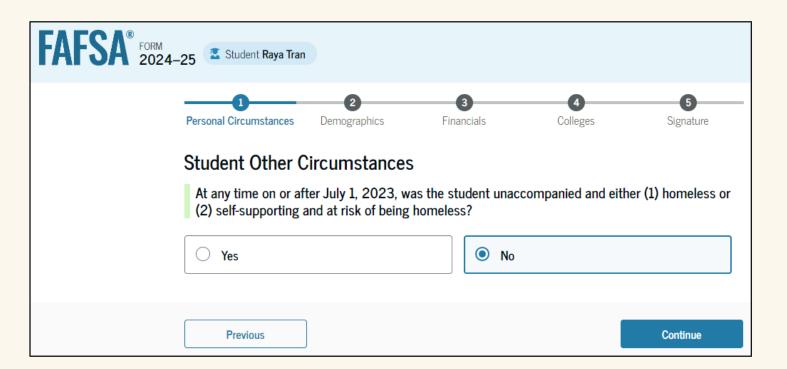
Other factors that qualify a student as independent:

- Older than 23
- Has dependents who receive support
- Active-duty miliary or Veteran
- If since turned 13: orphan, foster care, or ward of the court
- Emancipated minor
- In legal guardianship

O     Personal Circumstances     Demographics     Financials     Colleges     Signature	-
Student Personal Circumstances	
Select all that apply.	
The student is currently serving on active duty in the U.S. armed forces for purposes other than training.	
The student is a veteran of the U.S. armed forces.	
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.	
At any time since the student turned 13, they were an orphan (no living biological or adoptive parent).	
At any time since the student turned 13, they were a ward of the court.	0
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.	
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.	
✓ None of these apply	

#### Question on Homelessness

Students who are homeless or self-supporting and at risk of being homeless are independent



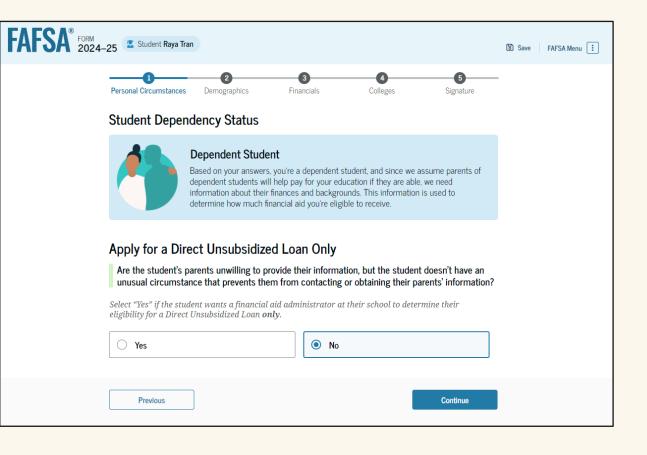
#### **Unusual Circumstances**

- The student is asked if unusual circumstances prevent them from contacting their parent(s).
- Answering yes will allow them to submit the FAFSA without parent information as a Provisional Independent Student
- Colleges will follow up if they require more information or documentation

AFSA® 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> <li>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.</li> </ul>		
	O Yes No		
	Previous Continue		

## **Dependency Status**

- Student will be told if considered a dependent student
- Option to apply for Federal Unsubsidized Loan only if parents are unwilling to provide information



Parent Wizard

Questions help student understand which parents need to report info on the FAFSA

AFSA® FORM 2024-	25 🔄 Student Raya Tran	🗴 Save 🛛 FAFSA Menu 🔃
	1     2     3     4     5       Personal Circumstances     Demographics     Financials     Colleges     Signature	
	Tell Us About Your Parents	
	On the FAFSA® form, your "Parent" is your legal (biological or adoptive) parent or stepparent who supports you financially.	
	Are your parents married to each other?	
	Yes     No	
	You will need to provide information for your parents Based on your answers in this section, you'll need to provide information about both of your parents on your FAFSA form. You can invite your parents to your form so they can complete their required sections.	
	Previous Continue	

F

What Parents Are on the FAFSA?

- Biological or adoptive parent(s)
- Include both parents if parents are married or are not married but live together
- Married parents include same-sex couples
- If separated but living together, select "Married"
- In the case of divorce/separation, use the parent that provided more financial support in the last 12 months, and the step-parent if that parent is remarried
  - If financial support was equal, select the parent with the higher income or assets
  - If no financial support was given to the student in the past 12 months, select the parent who provided the most support in the year when the student last received support from a parent

- Student enters personal information about parents to send them an invite to the FAFSA
- Parent email address does not have to match parent's FSA ID email address

FAFSA® FORM 2024-25 Student Raya Tran	🔀 Save 🛛 FAFSA Menu 🗄	Social Security Number (SSN)	Social Security Number (SSN)
Personal Circumstances Demographics Financials Colleges Signature Invite Parents to your FAFSA* Form	-	My parent doesn't have a SSN Email Address	HIDE ① My parent doesn't have a SSN Email Address
You will need to provide information for your parents Based on your answers in the previous section, you'll need to provide information about both of your parents on your FAFSA form. You can invite your family members to your form to help you complete all required sections.		alcinatran@school.edu	
Enter names of parents, identified on the prior page, and we'll send electronic requests on your behalf. Please make sure to provide information that your parents would use to login to StudentAid.gov.		Confirm Email Address alcinatran@school.edu	Confirm Email Address
Parent Parent Spouse First Name First Name		Invite Parent	Invite Parent
Last Name Tran Date of Birth Month Day Teer 05 05 1973 © Last Name Last Name Date of Birth Month Day Teer © ©		Previous	Continue

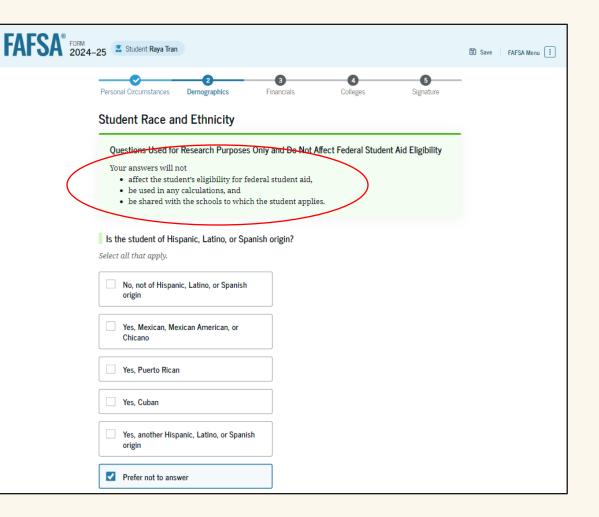
Student Demographics: Gender

- Optional question
- Does not affect aid eligibility
- Is not shared with colleges
- Can select Prefer not to answer

FAFSA <sup>®</sup> FORM 2024-2	25 🖾 Student Raya Tran	Save FAFSA Menu :
	Image: Personal Circumstances     Image: Demographics     Image: Signature	-
	Student Demographic Information	
	<ul> <li>Questions Used for Research Purposes Only and Do Not Affect Federal Student Aid Eligibility</li> <li>Your answers will not <ul> <li>affect the student's eligibility for federal student aid,</li> <li>be used in any calculations, and</li> <li>be shared with the schools to which the student applies.</li> </ul> </li> </ul>	
	What is the student's gender?	
	O Male	
	C Female	
	O Nonbinary or another gender	
	Prefer not to answer	
	Is the student transgender?	
	○ Yes ○ No	
	Prefer not to answer	
	Previous Continue	

### Student Race and Ethnicity

- Optional question
- Does not affect aid eligibility
- Is not shared with colleges
- Can select Prefer not to answer



#### Student Citizenship Status

Who is eligible for federal student aid?

- U.S. citizens
- Eligible non-citizens, including:
  - U.S. Nationals
  - Permanent Residents
  - Carriers of Arrival-Departure Records (I-94)
  - Holders (student or parent) of a T-visa
  - "Battered immigrant-qualified aliens"
  - Citizens of the Federated States of Micronesia, the Republic of the Marshall Islands, and the Republic of Palau

Citizenship status will be verified by:

- the Social Security Administration (citizens)
- the Department of Homeland Security (eligible non-citizens)

FAFSA® FORM 2024-2	5 Student Raya Tran
	Personal Circumstances Demographics Financials
:	Student Citizenship Status
	U.S. citizen or national
	C Eligible noncitizen
	Neither U.S. citizen nor eligible noncitizen
(	Previous

## Parent Education Status

FAFSA® FORM 2024	I–25 Student Raya Tran					🗑 Save 🛛 FAFSA Menu 🔃
	Personal Circumstances	2 Demographics	3 Financials	4 Colleges	5 Signature	-
	Parent Education		d college?			
	O Don't know					
	Previous	]			Continue	l

## Parent Killed in Line of Duty

FAFSA® FORM 2024-	-25 Student Raya Tran	)				🕄 Save 🛛 FAFSA Menu 🔃		
	Personal Circumstances	2 Demographics	3 Financials	<b>4</b> Colleges	5 Signature			
	Parent Killed in I		n the line of duty v	vhile (1) serving on	active duty as a			
	Was the student's parent or guardian killed in the line of duty while (1) serving on active duty as a member of the Armed forces on or after September 11, 2001 or (2) performing official duties as a public safety officer?							
	Public safety officers ind	clude law enforcement oj	fficers, firefighters,	and emergency serv	ice workers.			
	Previous				Continue			

## Student High School Completion Status

FORM 2024-25 Student Raya Tran	🗓 Save 🛛 FAFSA Menu 🔅
Personal Circumstances Demographics F	3 4 5 inancials Colleges Signature
	Status n status be at the beginning of the 2024–25
school year?     Iigh school diploma	
State-recognized high school equivalent (e.g., GED certificate)	
O Homeschooled	
O None of the above	
Previous	Continue

- If students selects High school diploma, will need to report the high school
- The student enters the school's city and state and selects the school from the search results

FAFSA® FORM 2024-2	25 📱 Student Raya Tran			🕲 Save 🛛 FAFSA Menu 🔃	FAFSA® FORM 2024-	–25 Student Raya Tran				🕲 Save 🛛 FAFSA Menu :
	Personal Circumstances Demographics	3 4 Financials Colleges	5 Signature	-		Personal Circumstances Demographics High School Information	3 Financials	4 Colleges	5 Signature	
	High School Information					-				
	-	1				From what high school did or will the st	udent graduate?			
	From what high school did or will the stud	ient graduate?				State				
	State					New York (NY)	0			
	New York (NY)	0				City				
	City					Brooklyn	0			
	Brooklyn	0				High School Name - optional				
		$\bigcirc$				Brown High School	3			
	High School Name - optional	_								
	Brown Hi	0				Brown High School				
	Brown High School					Brooklyn, New York (NY)				
	Q Search									
						Q Search Again				
	Previous		Continue			Previous			Continue	

## Student Tax Return Info

- Questions about the 2022 federal tax return
  - Any grant, scholarship, or AmeriCorps benefit reported as income to IRS
  - Any foreign earned income exclusion
- All other tax return data will be pulled in automatically

FAFSA <sup>®</sup> FORM 2024–25	a Tran							
Personal Circumstar	ces Demographics	3 Financials	4 Colleges	5 Signature				
Student 202	2 Tax Return Info	ormation						
Refer to the student's 2022 tax return to answer the following questions.								
Convert all curren	Convert all currency to U.S. dollars.							
Amount of Coll the IRS (option	ege Grants, Scholarships al)	s, or AmeriCorps Ber	nefits Reported as In	come to				
	axes on these grants, scho , not to first-time applica		These usually apply	to those renewing				
\$	0.	00 ①						
Foreign Earned	Income Exclusion							
\$	C	00. 00						
Previous				Continue				

Student Assets

- <u>Current</u> balance of cash, savings, and checking accounts
- Net value of any investments
- Net value of any business or farm

FORM 2024–25 Student Raya Tran	🐻 Save	FAFSA Menu 🚺
Personal Circumstances Demographics Financials Colleges Signature	-	
Student Assets		
Current Total of Cash, Savings, and Checking Accounts         Don't include student financial aid         \$ 500       .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.         \$ 0       .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 any debts owed against them.		
Previous Continue		

F/

#### College Search

- Select up to 20 schools
- Search by entering a state, city, and/or school name

14-25 Student Raya Tran	Save FAFSA Menu
Personal Circumstances Demographics Financials Colleges Signature	
Where should we send your FAFSA?	
Search for the colleges to which you'd like to send your FAFSA* information.	
You can add up to 20 colleges to your FAFSA form.	
1 0 of 20 Schools Selected View Selected Schools	
Search by School Name Search by School Code	
State	
Cali × ③	
California (CA)	
School Name - optional	
0	
Q Search	
	Personal Circumstances       Demographics       Financials       Colleges       Signature

Macalester College Madison, California (CA)	Federal School Code 038412	+ Select
Wellesley College Springfield, California (CA)	Federal School Code F09983	✓ Selected

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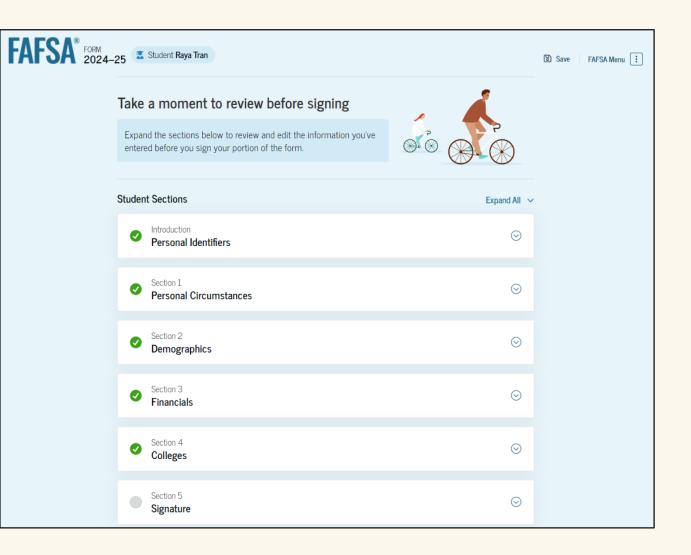
Selected Colleges

#### Student can re-order schools if school's state requires it be higher on the list

FAFSA® FORM 2024-25 Student Raya Tran	🕄 Save   FAFSA Menu 🗄	4	^ ~	University of California Northridge, CA	Federal School Code G03453	Temove	View Info
Personal Circumstances Demographics Financials Colleges Signature Selected Colleges	-	5	<ul><li>∧</li><li>∨</li></ul>	University of California Northridge, CA	Federal School Code G03453	Temove	View Info
These are the colleges you want to receive your FAFSA information To change the position of a school in your list, use the up and down arrow buttons to the left of the schools name.		6	^ ~	University of California Northridge, CA	Federal School Code G03453	Temove	View Info
School list guidelines for Connecticut residents To be eligible for state grant aid in Connecticut, you must list an eligible in-state college within the first 2 positions. If you update your school choices later, please notify your state agency by sending an email to sfa@ctohe.org		7	^ ~	University of California Northridge, CA	Federal School Code G03453	Tremove	View Info
		8	^ ~	University of California Northridge, CA	Federal School Code G03453	Temove	View Info
Showing 1 to 10 of 12		9	^ ~	University of California Northridge, CA	Federal School Code G03453	👕 Remove	View Info
1     Image: CA     Federal School Code     Remove     View Info       Northridge, CA     G03453		10	^ ~	University of California Northridge, CA	Federal School Code G03453	👕 Remove	View Info
2 View Info Northridge, CA		Q Se	earch a	and Select Schools			
3 View Info Northridge, CA G03453			Pre	evious	< Previous 1 2 Next >		Continue

#### Student Review Page

- Can expand all or expand each section
- To edit a response, select the question's hyperlink to be taken to the corresponding page
- Data transferred from the IRS will not display on this page



**Contributor Details** 

Student sees any Contributors who have been invited and the invitation status

#### This Section is Shared With 2 Contributors

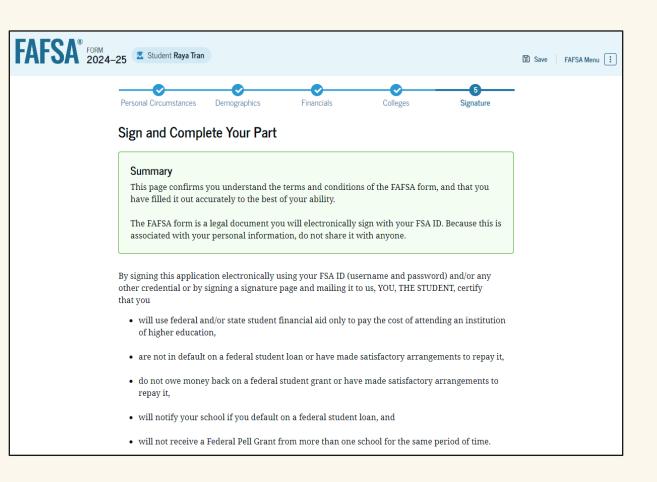
Your FAFSA form is shared with the individuals listed below. You can request, manage, or remove signatures and contributions from this page or in your FAFSA form.

Parent Contributors	Date Request Sent	Status	Edit 🗹
≗S Alcina Tran	07/13/2024	Invite Sent	
🐣 Travis Tran	07/13/2024	Invite Sent	
Previous			Continue

Parent Contributor Section

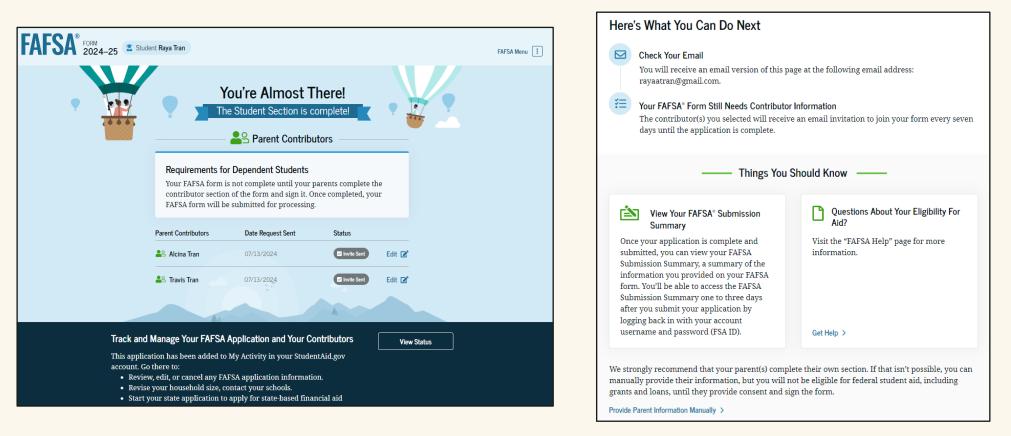
Student Signature

- Student agrees to terms and conditions and can submit the student section
- The FAFSA is not considered complete nor processed until all sections are sent



#### Student Section Complete

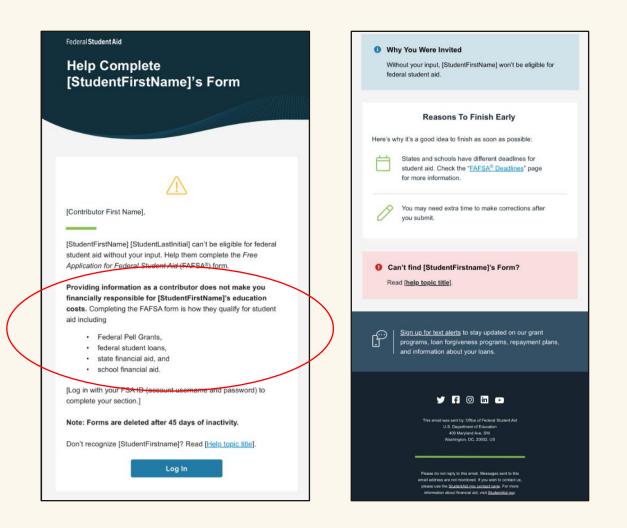
- Lists next steps and how to track FAFSA status
- Reminds student all Contributors must complete and sign their sections
- Shows status of Contributors' sections



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#### Parent Email Invitation

- Parent will get email invitation to do FAFSA
- Parent clicks Log In to get to FAFSA log-in
- Text stresses completing the FAFSA does not make the parent financially responsible
- Parent *can* start the FAFSA before the student; will review that process at the end



#### Parent Log-In Page

- Parent enters FSA ID
- If parent does not yet have an FSA ID, parent should click *Create an Account*

An official website of the United States government.				Help Center	Submit a Complaint	English   Español
Federal Student Aid	m → Loans and Grants →	Loan Repayment ~	Loan Forgiveness 🗸		Log In   Create Acco	unt Q
	Log In 🖘					
	Email, Phone, or FSA test595011623	ID Username				
	Password					
	•••••		Show Password			
		Log In				
	Forgot My User	name   Forgot My Pass	word			
	C	reate an Account				
	Help Me	Log In to My Accou	nt			
Help Center I Contact Us I Site Feedback		Abo	out Us Announcemer	ts Data Cer	nter Resources	Forms Library
Federal Student Aid	≥gov   ed.gov   Site Feedback					

#### Parent Activity Page

- After logging in, parent is brought to *My Activity* page
- Parent will see an invitation to be a Contributor on the student's FAFSA

An official website of the United Stat	es government.	Help Center	English   Español
Federal Student A	Aid FAFSA ~ Loans & Grants ~ Repayment ~ Loan Forgiveness ~	Q 🍨	Alcina 🗸
	<section-header>My ActivityCurrently ActiveYou have been requested to be a Contributor on a FAFSA for Raya TranThe Free Application for Federal Student Aid (FAFSA) form helps students apply for federal grants, work-study, and loans.Decline InvitationGet Started</section-header>		
	Borrower Defense Case #07688447 Action Required Last Updated: 06/27/2022		
	PSLF Application  Action Required  Last Updated: 06/22/2022  The Peace Corps		

- Parent gets details about the Contributor role
- After clicking Continue, parent will see the same onboarding slides the student viewed

FAFSA® FORM 2024-25 Parent of Raya Tran	What do I need to complete my section(s)?
Parent Contributing to the FAFSA* Form	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.
<ul> <li>This FAFSA form can't be submitted for processing until you provide some required personal and financial information.</li> </ul>	What kind of information will I be asked to provide?
→ You can save this form and come back to it later.  Frequently Asked Questions	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.
Why have I been invited to contribute to this FAFSA* form?	What happens after I complete my sections?
You have been invited 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.	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.
Does contributing to the form mean I'm responsible to pay for college?         Image: College	Previous Continue

#### Parent Identity Information

- Parent info from the FSA ID for review
- Any changes to info must be made under Account Settings on StudentAid.gov except

mailing address, which can be corrected on the screen

FAFSA <sup>®</sup> FORM 2024–25 Parent of Raya Tran	Permanent Mailing Address Include apartment number. 12345 Sesame Street
Parent Identity Information Review the information below and verify that it's correct before moving forward.	City New York State
Name Alcina Tran Date of Birth 05/05/1973	New York (NY)     ~       Zip Code     67891
Social Security Number •••-••1234 Email Address alcinatran@school.edu	Country United States of America (US)
Mobile Phone Number (555) 555-5555 To update this information for all federal student aid communications, go to Account Settings.	Previous Continue

#### Parent Provides Consent

- By providing consent, the Contributor allows the FAFSA to pull federal tax data directly into the FAFSA from the IRS
- Every Contributor MUST provide consent in order for the student to receive need-based federal aid
- Select Approve to provide consent



#### Parent Marital Status

FAFSA® FORM 2024-25 Parent of Raya Tran			聞 Save	FAFSA Menu 🔃
Demographics	2 Financials	3 Signature		
Parent Current Marital Status				
Single (Never Married)				
Unmarried and both legal parents living together				
Married (not Separated)				
C Remarried				
Separated				
O Divorced				
O Widowed				
Previous		Continue		

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#### Parent Federal Benefits Received

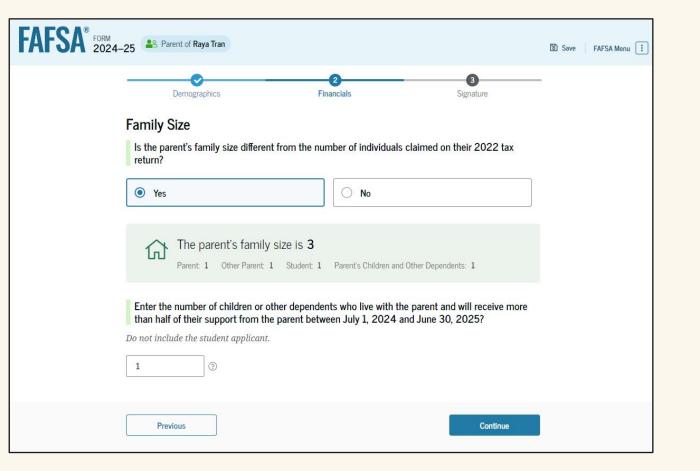
FSA® FORM 2024-25 AS Parent of Raya Tran	🕲 Save 🛛 FAFSA Menu 🗄
Demographics Financials Signature	
Federal Benefits Received	
Questions Don't Affect Federal Student Aid Eligibility Your answers to these questions will not affect the student's eligibility for federal student aid or these federal benefits.	
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	
Free or Reduced Price School Lunch	
Medicaid	
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.	
Previous	

### Parent Tax Filing Status

FAFSA <sup>®</sup> FORM 2024-25 Parent of Raya Tran	🕃 Save 🛛 FAFSA Menu 🔃
Demographics Financials Signature	
Parent Tax Filing Status Did or will the parent file a 2022 joint tax return with their current spouse?  Yes No	
Previous Continue	l

Family Size

- FAFSA will automatically assume family size based on number of individuals claimed on tax return
- Parents will likely not see this number
- Parents can manually report a number if desired
- Include any dependents who live with the parent and will receive more than half of their financial support from parents 7/1/24-6/30/25



#### Number in College

- Report how many people will be in college between July 1, 2024, and June 30, 2025
- Do not include parents
- Will not be used in calculation of federal aid
- Colleges can choose to use this info to award institutional (college) funds

FSA® FORM 2024-25	Parent of Raya Tran			ලි Save	FAFSA Menu :
-	Demographics	2 Financials	3 Signature		
1	lumber in College How many people in the parent's family wil 2025? o not include the parent. 1	l be in college between July 1, 202	24, and June 30,		
	Previous		Continue		

F/

#### Parent Tax Return Information

Parents asked to report any:

- Earned Income Credit
- Grants, scholarships, or AmeriCorps benefits reported as income
- Foreign earned income exclusion

FAFSA <sup>®</sup> FORM 2024-	25 Parent of Raya Tran		Save FAFSA Menu
	Demographics Financials	3 Signature	
	Parent 2022 Tax Return Information Refer to the parent's 2022 tax return to answer the follow Convert all currency to U.S. dollars.	TC)?	
	Amount of College Grants, Scholarships, or AmeriCorps to the IRS (optional)         The parent paid taxes on these grants, scholarships, or beneprenewing their FAFSA® form, not to first-time applicants.         s       0       .00         Foreign Earned Income Exclusion         s       0       .00		
	Previous	Continue	

Parent Assets

- Annual child support received
- Current balance of cash, savings, and checking accounts
- Net value of investments
  - Real estate
  - Mutual funds, stocks, bonds
  - 529 college savings accounts (only for the student)
  - <u>Exclude</u>: primary home, life insurance, retirement accounts
- Net value of all businesses and farms value (in the past some were excluded)
- If parent income <\$60,000, no asset questions will be asked

FAFSA® FORM 2024-	25 Parent of Raya Tran			🗟 Save 🛛 FAFSA Menu 🔃
	Demographics	2 Financials	3 Signature	
	Annual Child Support Received Enter total amount received in child support fo	r the last complete calendar year. 00		
	Parent Assets Current Total of Cash, Savings, and Checkin Don't include student financial aid	ng Accounts		
	Current Net Worth of Businesses and Invess Enter the net worth of your businesses or for-p your businesses or farms minus any debts ower	tment Farms rofit agricultural operations. Net we	orth is the value of	
	Current Net Worth of Investments, Includin Don't include the home you live in. Net worth is against them. S 5,000	-	ıs any debts owed	
	Previous		Continue	

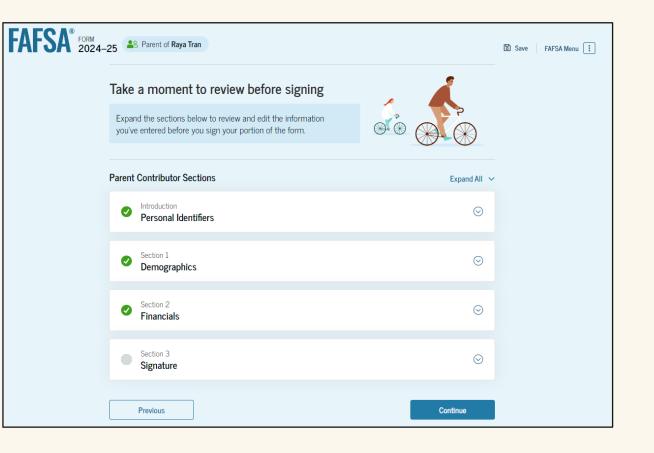
#### Other Parent Information

Parent provides information about other parent (if married or living together) or current spouse

FAFSA <sup>®</sup> Porm 2024-25 Parent of Raya Tran	🕄 Save 🛛 FAFSA Menu 🔃
Demographics Financials Signature	
Other Parent's Information Enter the following information about the other parent.	
Other Parent	
First Name	
Travis	
Last Name	
Tran	
Date of Birth Month Day Year	
02 01 1970 ⑦	
Social Security Number (SSN)	
show (j)	
travistran@gmail.com	
Confirm Email Address	
travistran@gmail.com	
Previous	

#### Parent Review Page

- Can expand all or expand each section
- To edit a response, select the question's hyperlink to be taken to the corresponding page
- Data transferred from the IRS will not display on this page



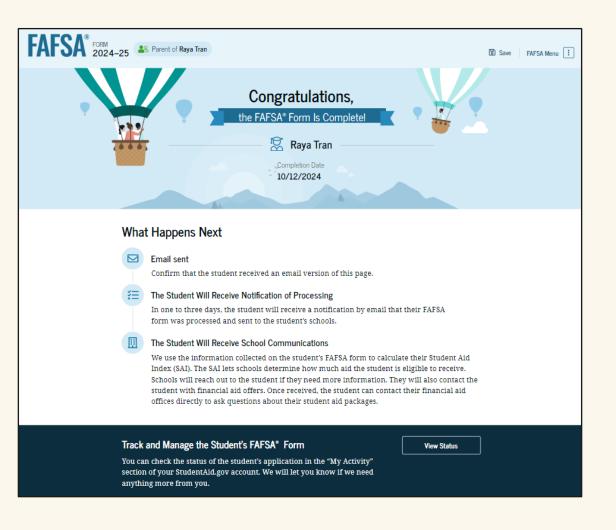
#### Parent Signature

- Parent agrees to terms and conditions and can submit the parent section
- The FAFSA is not considered complete nor processed until all sections are sent

FAFSA <sup>®</sup> 2024	-25 🚉 Parent of Raya Tran	Save FAFSA Menu :
	Demographics Financials Signature	
	Summary This page confirms that you understand the terms and conditions of the FAFSA <sup>#</sup> 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 • 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 unusal 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 for yourself and submit the application for Raya Tran (Student).	
	Cancel Sign and Submit	

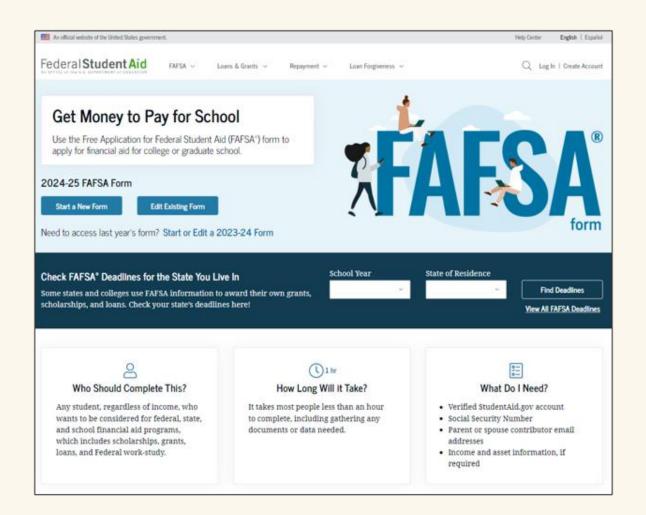
#### **FAFSA** Confirmation

- If parent completed the last required section, the FAFSA will be submitted for processing
- Page provides info on tracking the FAFSA and next steps
- Student will receive an email with detailed confirmation info



Parent Starting the FAFSA First

 If parent wants to start FAFSA before the student, clicks *Start a New Form* on FAFSA homepage fafsa.gov



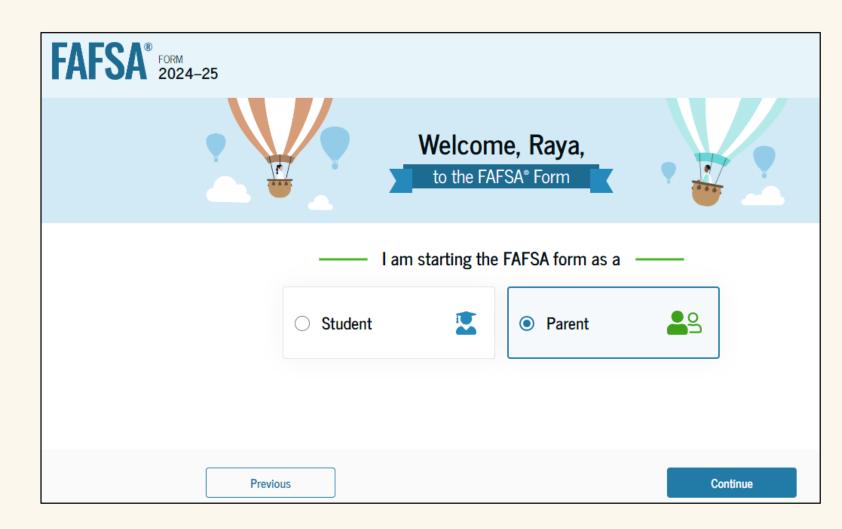
Parent Log-In

## Parent should log in with FSA ID or click Create an Account to get an FSA ID

An official website of the United States government.		Help Center Submit a Complaint English	Espai
ederal <b>Student Aid</b> FAFSA® F	orm $\checkmark$ Loans and Grants $\checkmark$ Loan Repayment $\checkmark$ Loan Forgiveness $\checkmark$	Log In   Create Account	Q
	Log In 🖘		
	Email, Phone, or FSA ID Username		
	test595011023		
	Password		
	Show Password		
	Log In		
	Forgot My Username   Forgot My Password		
	Create an Account		
	Help Me Log In to My Account		
elp Center I Contact Us I Site Feedback	About Us Announcement	s Data Center Resources Forms L	_ibra
ederal Student Aid			
Notices   usa.gov	vote.gov   ed.gov   Site Feedback		

Parent Role

Parents selects "I am starting the FAFSA form as a Parent"



Student Information

- Parent provides student information
- Since student has not started a FAFSA, student will receive an email with notification that a FAFSA has been started on the student's behalf
- Student can then log in, provide consent for IRS data transfer, and sign the FAFSA
- The parent can answer the student questions
- If student hasn't yet provided consent, parent can manually enter student's tax return info

FORM 2024-25	5 SParent of Raya Tran
	Student Information Provide the information below before moving forward.
F	irst Name
M	fiddle Initial
L	ast Name
	Date of Birth Ionth Day Year
So	ocial Security Number (SSN)
E	mail Address
c	onfirm Email Address
M	fobile Phone

#### FAFSA Submission Summary (FSS)

- Summary of FAFSA information
- Lists when FAFSA was received and processed
- Links to aid summary and College Scorecard
- 4 tabs
  - Eligibility Overview
  - FAFSA Form Answers
  - School Information
  - Next Steps
- Will start becoming available by end of Jan 2024
- By Feb 2024, FSS should arrive 1-3 days after FAFSA submission

<b>AFSA</b> <sup>®</sup> FORM 2024-25 FAFSA Submission Summ	mary	🖨 Print This Pa
Student Z Raya Tran Application Received Application Processed Sept. 10, 2024 Sept. 12, 2024	Data Release Number ③ 2572	Viewing: Submission 1 ③
igibility Overview FAFSA Form Answers School Information • Next S	Steps	
Eligibility Overview FAFSA Form Answers School Information • N	lext Steps	
Estimated Federal Student Aid		
Federal Pell Grant ① A Federal Pell Grant is awarded to undergraduate students who have financial need and who have not earned a degree or are in a teacher certification program. Federal Pell Grants don't need to be repaid.	Up to <b>\$4,556</b>	View All of Your Federal Student Aid in One Place View detailed information about your federal loan and grant aid, including your enrollment history, payment history, and subsidized usage.
Federal Direct Loans ① A federal direct loan is money lent by the government to you that you must repay with interest.	Up to \$4,556	Visit Ald Summary
Federal Work-Study ① Federal Work-Study is a way for students to earn money to pay for school through part-time jobs on or off campus.	You May Be Eligible	Find the Right College or Career School Use the College Scorecard to compare schools by size, location, graduation rate, and more.
Amounts shown here are only estimates of federal student aid based enrollment and the average cost of attendance. Your school will det student aid to offer you, which may include additional aid from you Learn more about financial aid	ermine how much	Visit College Scorecard 🖉
Keep in mind, this is only an estimate Always refer to your school's financial aid offer for a determination of financial aid available.	final	

#### Eligibility Overview

- Lists federal aid student may receive, including Pell Grant and Direct Loans (these are only estimates)
- List the Student Aid Index (SAI)

#### Your Student Aid Index (SAI)

Your SAI is a number used by your school to determine your federal student aid eligibility and to build your financial aid offer

-355 🕐

What does this mean?

ligibility Overview	FAFSA Form Answers	School Information	Next Steps	
Estimated Fede	eral Student Aid			
students who ł earned a degre	nt ① Grant is awarded to und have financial need and se or are in a teacher cer rants don't need to be rep	who have not tification program.	Up to	\$4,556
	oans (i) et loan is money lent by t nust repay with interest.	he government to	Up to	\$4,556
	udy ① Study is a way for studer sol through part-time job	· · · · · ·	You N	lay Be Eligible
enrollment and	n here are only estimates l the average cost of atter offer you, which may incl out financial aid	ndance. Your school w	ill determine how	v much
A	eep in mind, this is only lways refer to your scho etermination of financia	ol's financial aid offer	for a final	

#### FAFSA Form Answers

- Students sees answers provided by all Contributors
- Here the student can start a correction (not available until end of January 2024)
- Data transferred from the IRS will not display on this page

Eligibility Overview	FAFSA Form Answers	School Information	Next Steps
	es carefully and make sure Start a correction to fix any		Make a Correction
Student Sections			Expand All $\sim$
Introduction Personal Identif	iers		$\odot$
Section 1 Personal Circur	nstances		$\odot$
Section 2 Demographics			$\odot$
Section 3 Financials			$\odot$
Section 4 Colleges			$\odot$
Section 5 Signature			$\odot$

#### School Information

Student sees the following information

for each school selected:

- Graduation rate
- Retention rate
- Transfer rate
- Default rate
- Median debt upon completion
- Average annual cost

Eligibility Overview	FAFSA Form Answers	School Informati	on	ps		
Find an Affordable	School					
Many schools offer th listed on your form.	he opportunity to attend col	llege affordably. Lea	arn about the cost	s and benefits as	sociated with the schools you	
Learn More on College Scorecard 🖸 Showing results for family income between \$0-\$30,000					y income between \$0-\$30,000 \screw	
School Name	Graduation Rate ⑦	Retention Rate ⑦	Transfer Rate ③	Default Rate 🔅	Median Debt Upon Completion ⑦	Average Annual Cost ⑦
George Washingtor University	1 15%	89%	26%	64%	\$56,000	\$102,000
University of North Carolina, Chapel Hil		76%	25%	34%	\$24,000	\$38,000
University of Califor North Ridge	rnia, 55%	65%	35%	15%	\$19,000	\$24,000
			View A	II ~		

Next Steps

- Comments displayed based on student's FAFSA
- Some may require student to make a correction or send documentation to schools

Eligibility Ov	verview FAFSA Form Answers School Information • Next Steps	
¥≡	Next Steps         1       Correct any errors on your FAFSA® form         2       Make sure your schools have everything they need         3       Look out for aid-related communications from your schools	© ©
i	<ul> <li>For Your Awareness</li> <li>VA Education and Training Benefits help veterans, service members, and family members with needs like paying college tuition or finding the rig school.</li> <li>Based on the information we have on record for you, your Student Aid I (SAI) is 123,456,789. You may be eligible to receive a Federal Pell Grant a other federal student aid. Your college's or career school's financial aid o will use your SAI to determine your eligibility for other types of grants, scholarships, work-study funds, and loans</li> <li>The limit to the total amount of Federal Pell Grants that a student may re is the equivalent of six school years. Once you've reached that limit, you no longer receive a Federal Pell Grant.</li> </ul>	ndex nd ffice eceive
ŝ	Understand Your Tax Benefits Did you know that the IRS provides tax benefits for education? These tax benefits can be used to get back some of the money you spend on tuition of interest, or to maximize your college savings. Learn About Tax Benefits	or loan

What Happens After Families Submit the FAFSA

- Colleges and the state receive the data electronically by end of January 2024
- Colleges may request additional documentation or additional information through a process called **Verification** 
  - Families <u>must</u> comply with Verification to receive federal financial aid
- Colleges send out financial aid offers (typically Mar-April)

National and Community Resources

**FAFSA** Day

- -Free assistance completing the FAFSA
- -Events Oct-Feb
- -More information at FAFSADay.org



Educational Opportunity Centers

-Free financial aid help

-MassEdCO.org



Bridging the equity gap.

Things To Do

- Register for other MEFA webinars at mefa.org/mefa-institute
- Tell your students and parents to get an FSA ID
- Advise families to research deadlines and required applications —Schools may require applications in addition to the FAFSA
- Encourage students to complete the FAFSA as soon as it becomes available and other financial aid applications

#### **Upcoming MEFA Institute Webinars**

# Learn about FAFSA Completion Reports

Thursday, January 18, 2024 8:30 PM



Helping Students and Parents Approach the College Choice Process Systematically

Wednesday, January 31, 2024 8:30 AM



#### View more events: mefa.org/mefa-institute

# Everything You Need to Know about Tuition Break

Thursday, February 29, 2024 2:30 PM



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**Thank You** 

# **QUESTIONS?**

Call (800)-449-MEFA (6332) or email <u>collegeplanning@mefa.org</u>



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