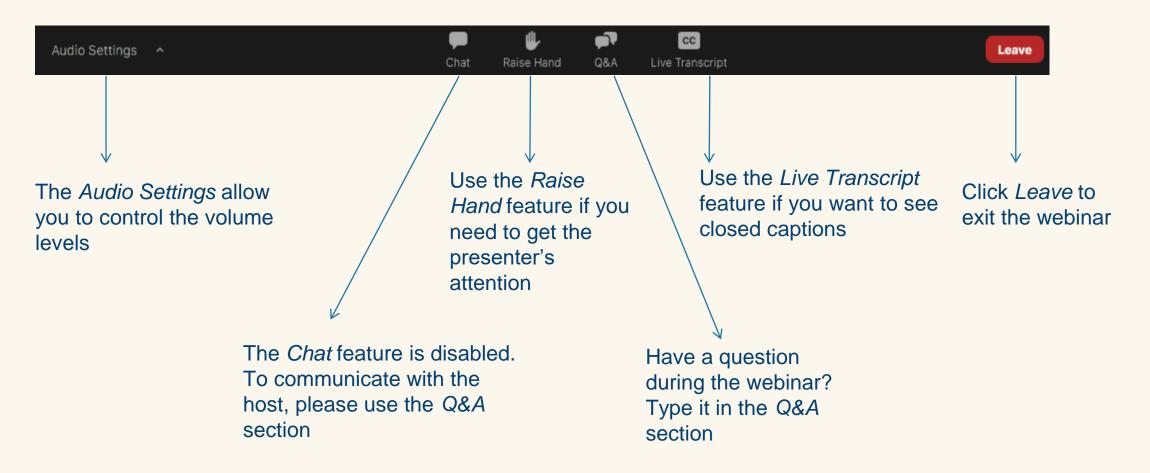
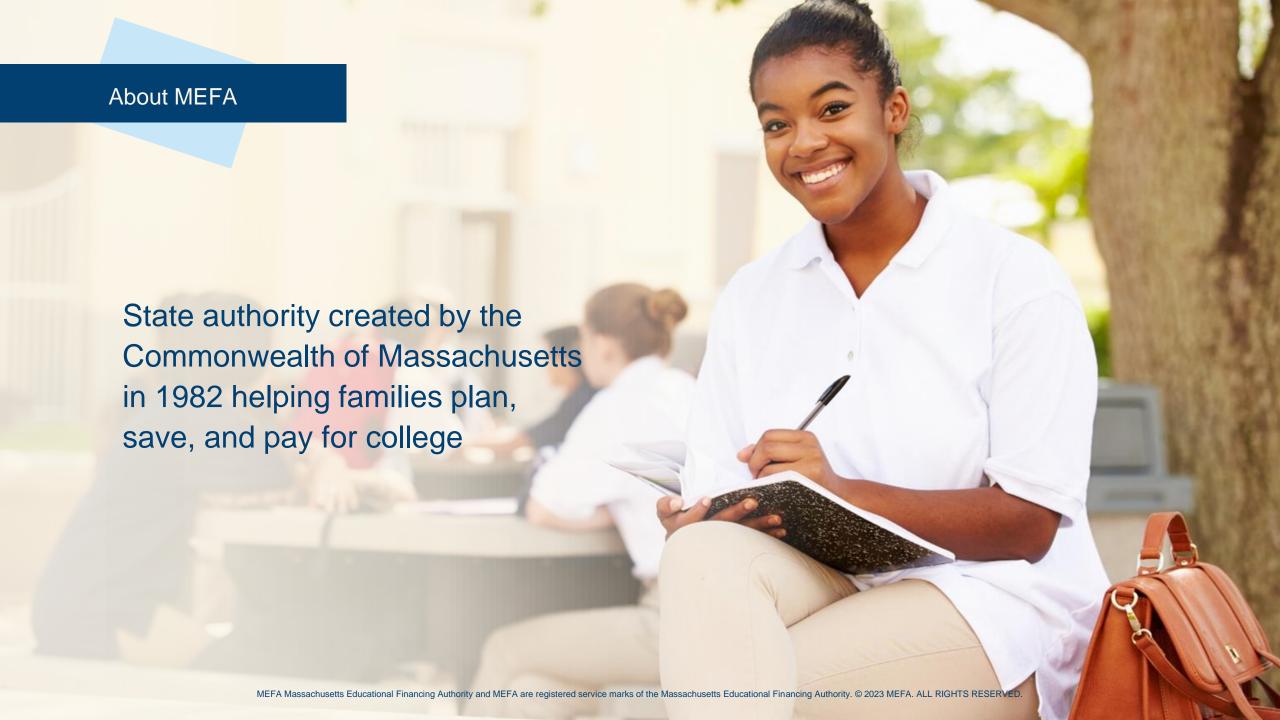
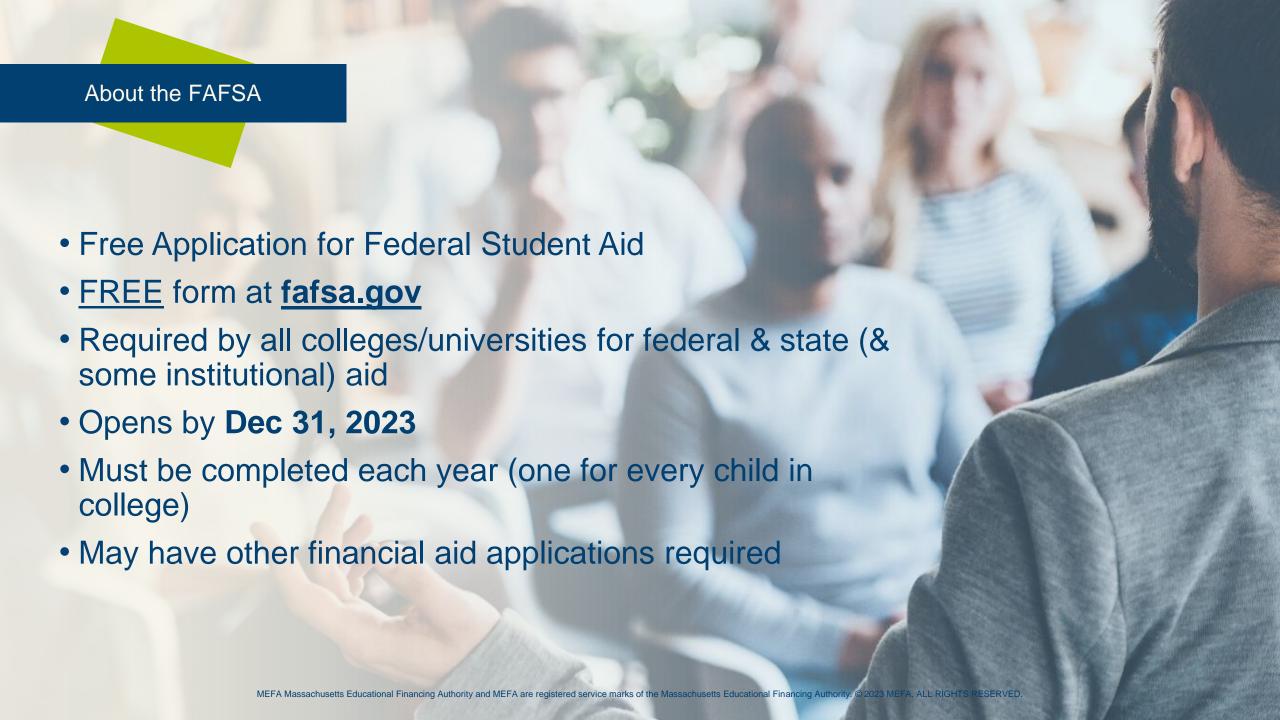
Understanding the FAFSA®



How to Participate

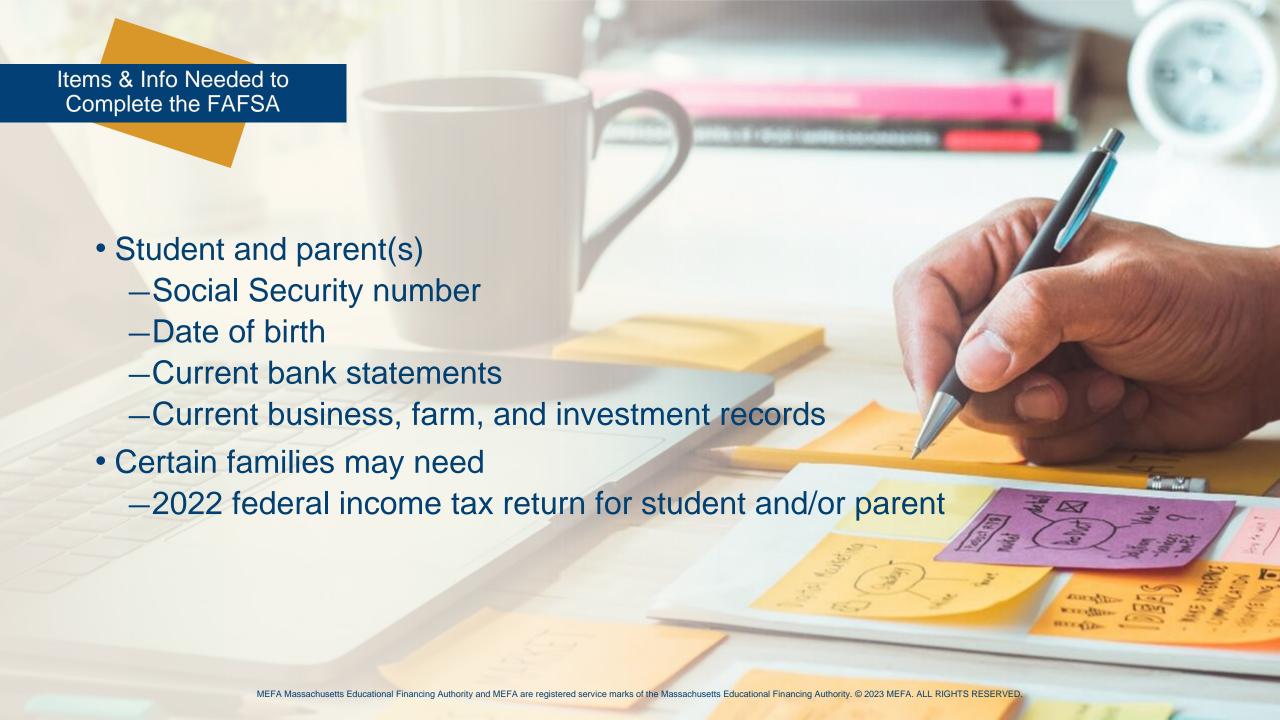






Completing the FAFSA

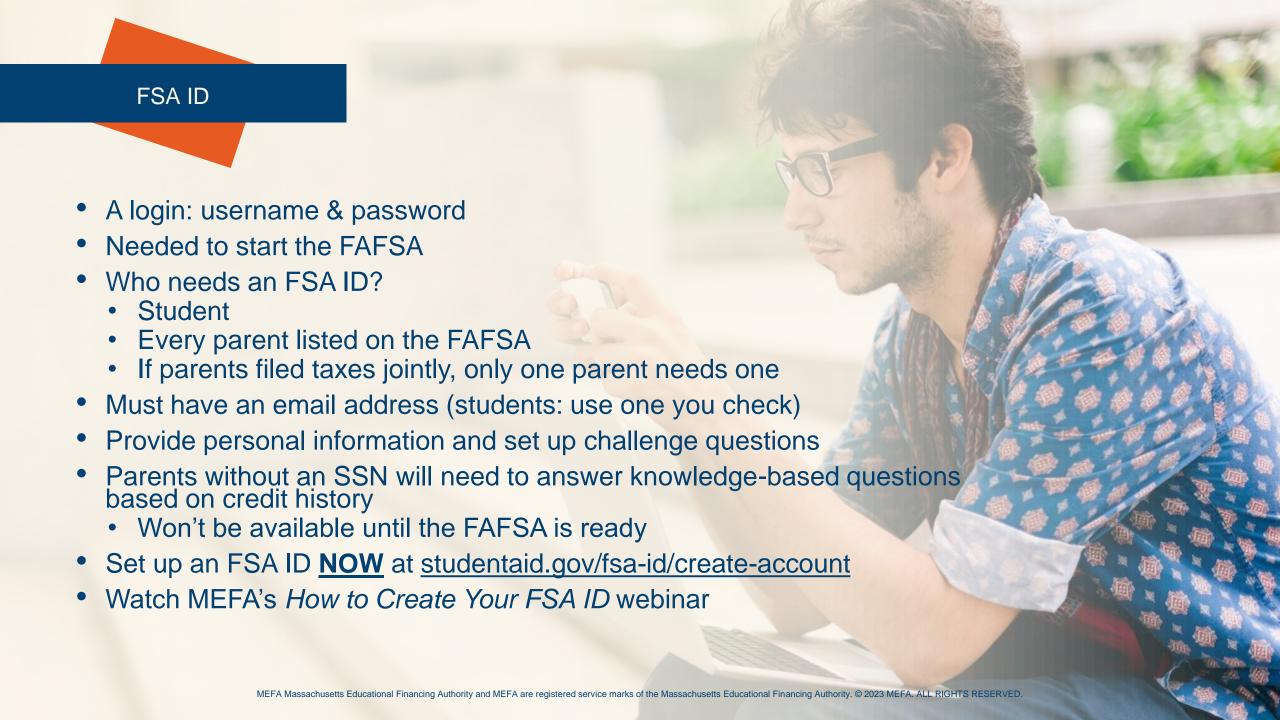
- Contributor: Anyone who needs to provide information
- Each contributor has a section for that person to complete
- All income questions will pull answers from your federal tax return with your consent
- You must provide consent to pull your tax data for the student to receive federal financial aid
- 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





- **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

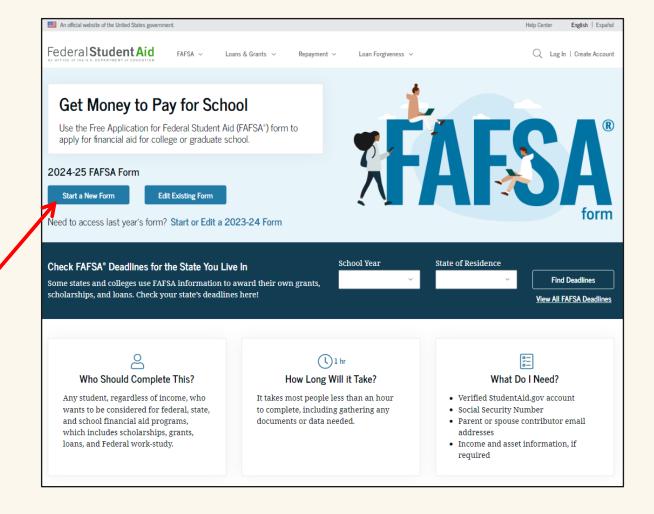






FAFSA Homepage

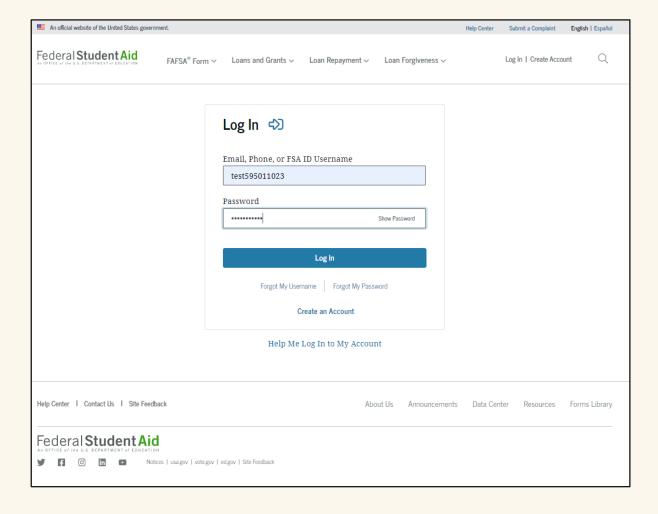
- Choose Start a New Form
- Several help boxes at the bottom





Log-In Page

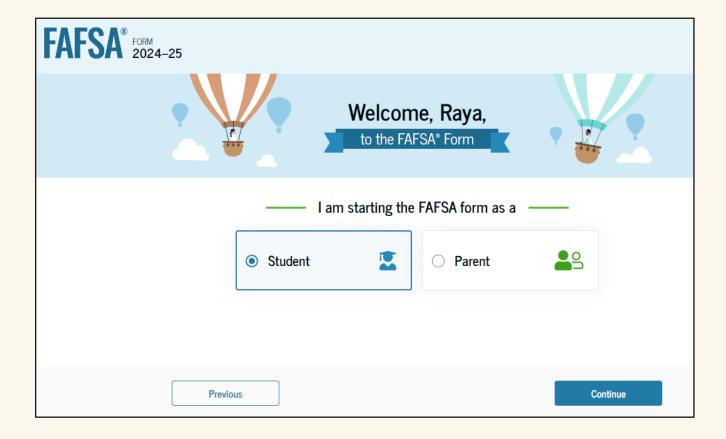
- Must use an FSA ID to log in
- Select Create an Account to get an FSA ID





Role

Choose student or parent role





Overview Video

First of four onboarding slides





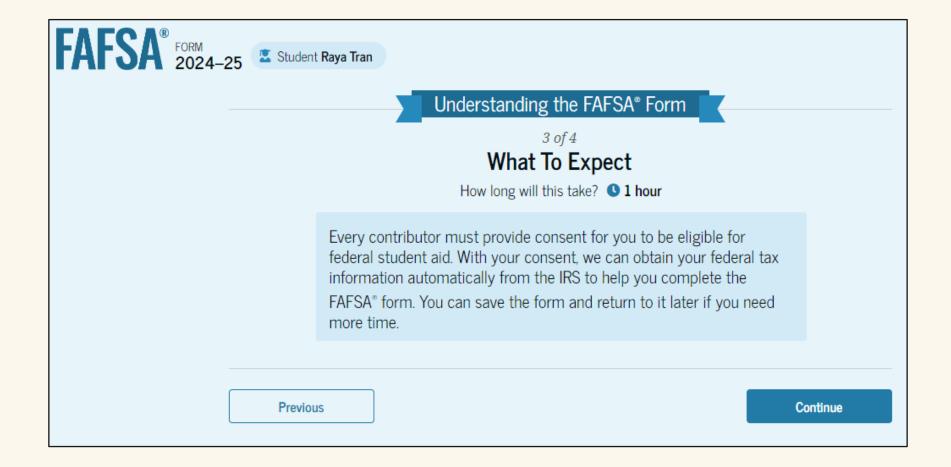
Defining Contributors

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





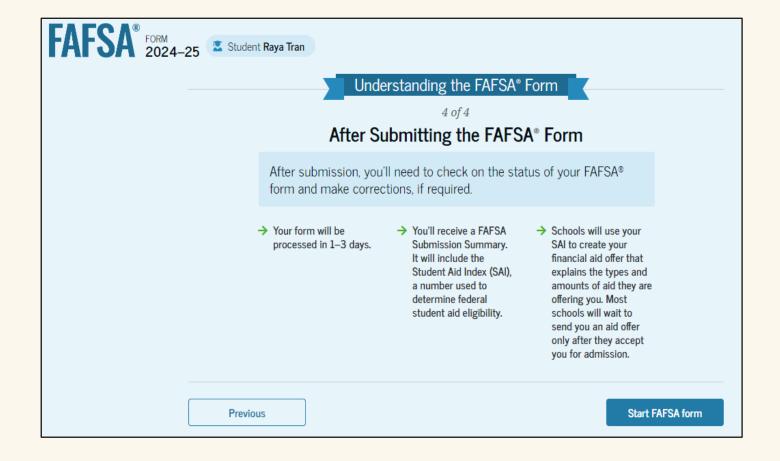
Explaining Consent





After the FAFSA

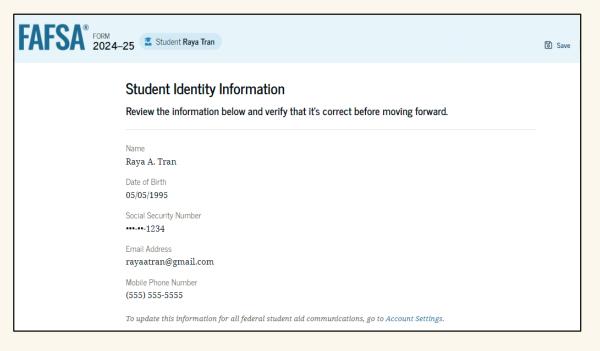
Click Start FAFSA form to begin

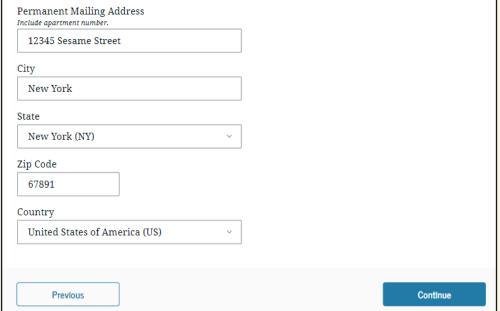




Student Identity Info

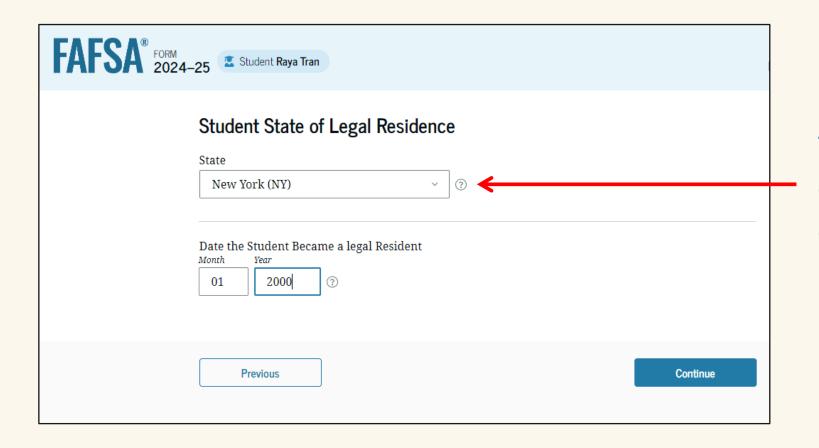
- Student info from the FSA ID for review
- Any changes to info must be made under Account Settings on StudentAid.gov except mailing address, which can be corrected on the screen







State of Legal Residence



Throughout the application, click the question mark icon for more details on answering each question



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





Personal Circumstances

Questions to determine if student is:

 dependent (needs to report parent information on the FAFSA)

OR

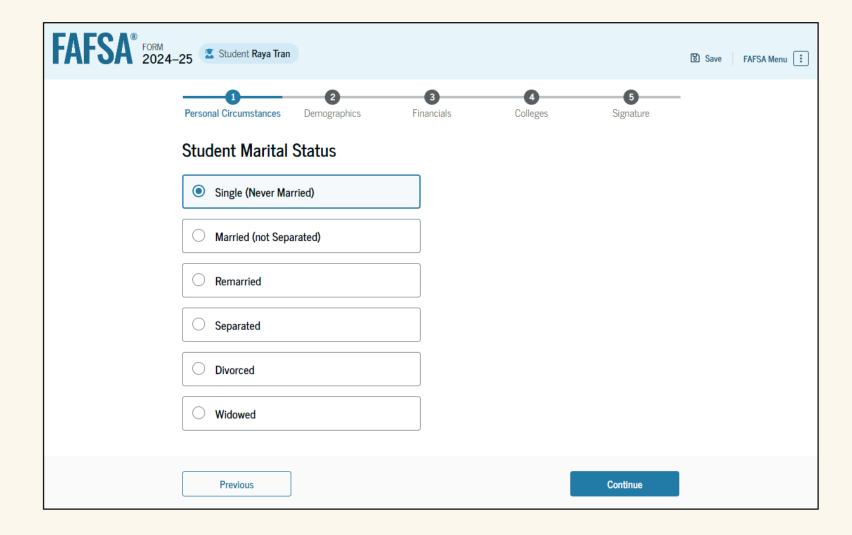
independent (does not need parent data)





Marital Status

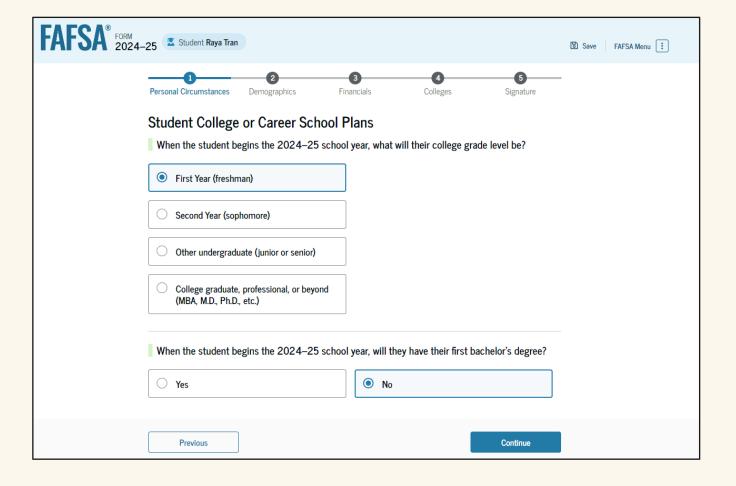
- Married students are independent
- Separated students are not considered independent





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

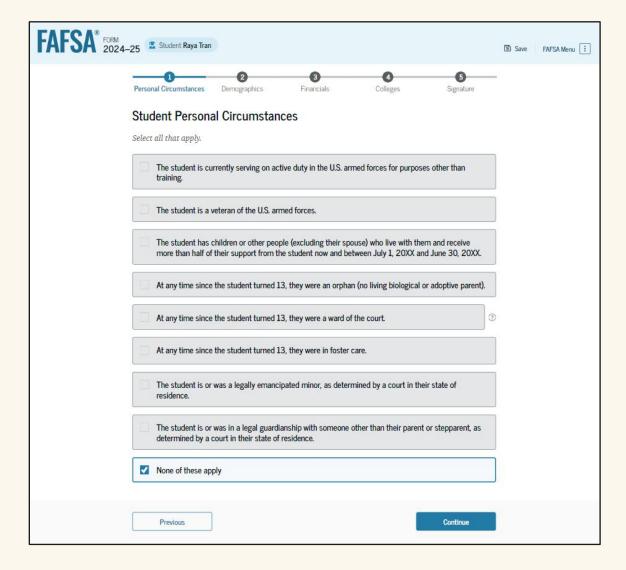




Other Personal Circumstances

Other factors that qualify a student as independent:

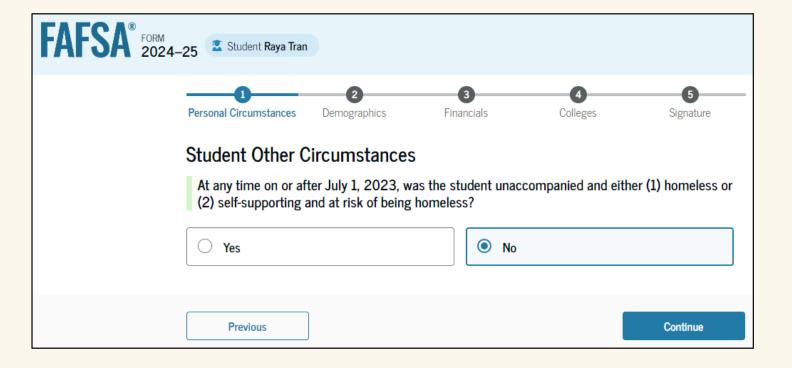
- Older than 23
- Has dependents who receive support
- Active-duty miliary or Veteran
- If since turned 13: orphan, foster care, or ward of the court
- Emancipated minor
- In legal guardianship





Question on Homelessness

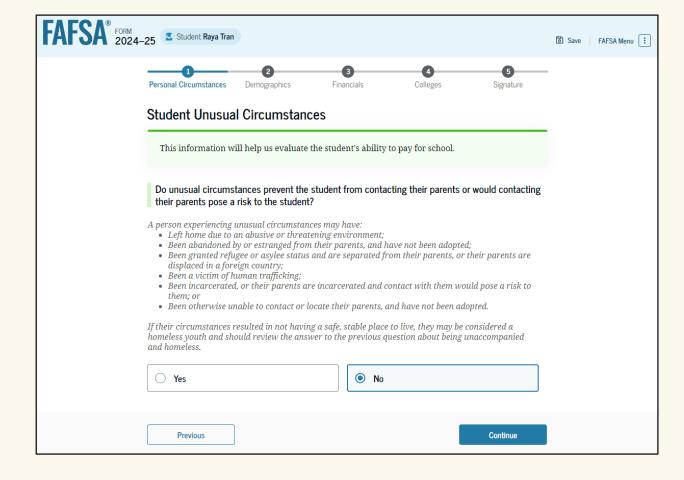
Students who are homeless or self-supporting and at risk of being homeless are independent





Unusual Circumstances

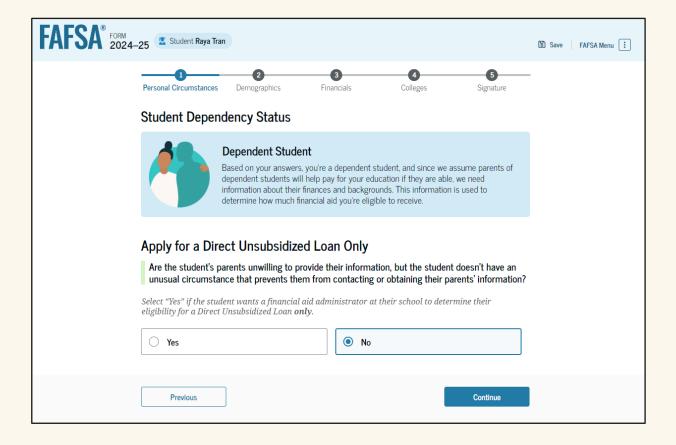
- The student is asked if unusual circumstances prevent them from contacting their parent(s).
- Answering yes will allow them to submit the FAFSA without parent information as a Provisional Independent Student
- Colleges will follow up if they require more information or documentation





Dependency Status

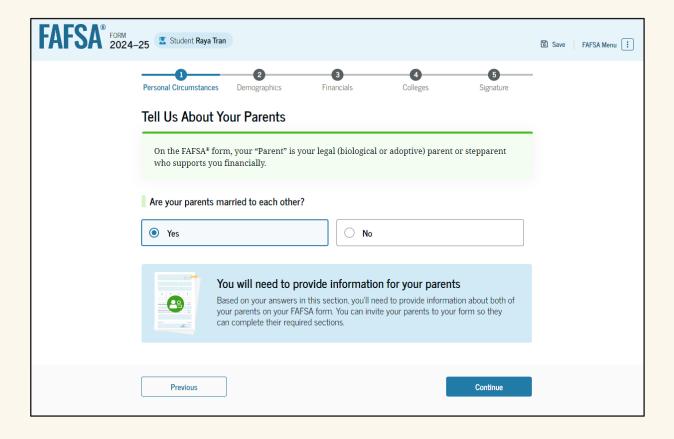
- Student will be told if considered a dependent student
- Option to apply for Federal
 Unsubsidized Loan only if parents are unwilling to provide information





Parent Wizard

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



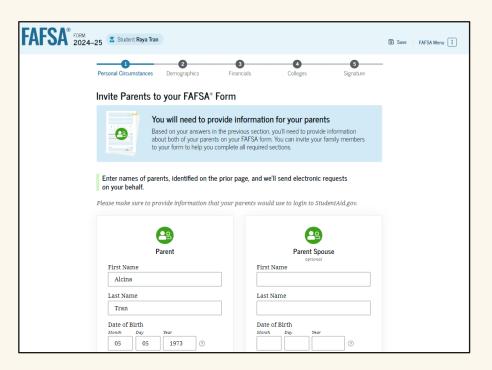
What Parents Are on the FAFSA?

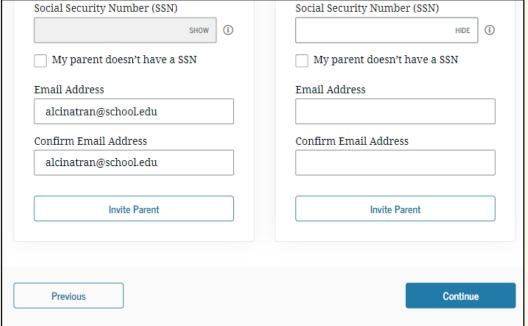
- Biological or adoptive parent(s)
- Include both parents if parents are married or are not married but live together
- Married parents include same-sex couples
- If separated but living together, select "Married"
- In the case of divorce/separation, use the parent that provided more financial support 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 Invites Parents to the FAFSA

- 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

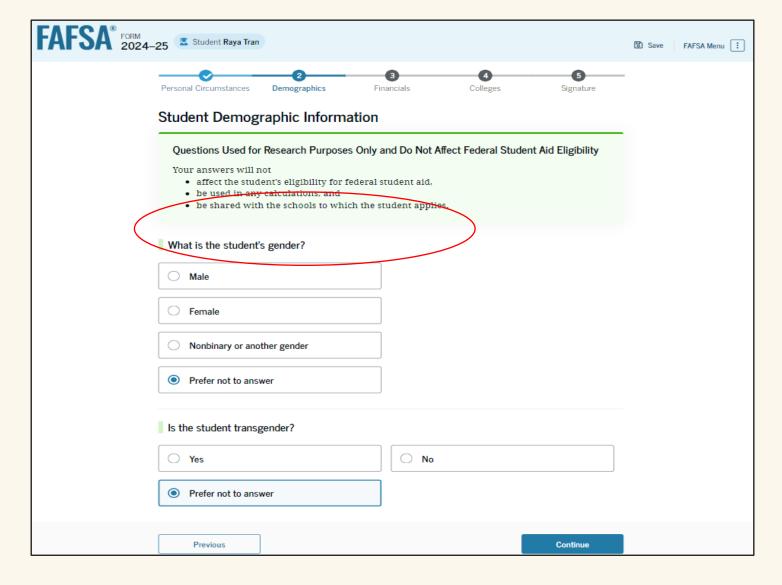






Student Demographics: Gender

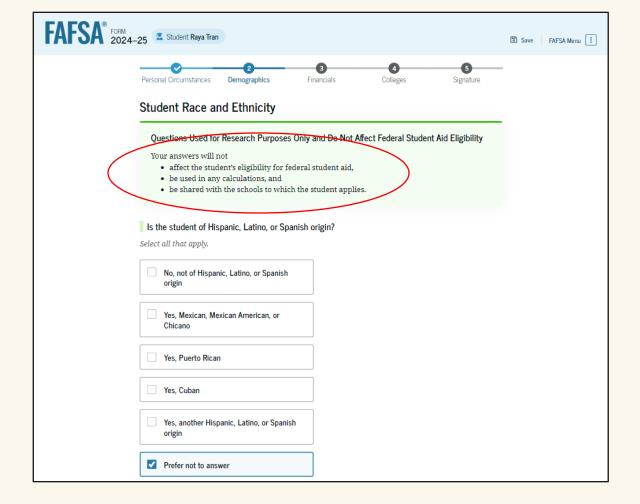
- Optional question
- Does not affect aid eligibility
- Is not shared with colleges
- Can select Prefer not to answer





Student Race and Ethnicity

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





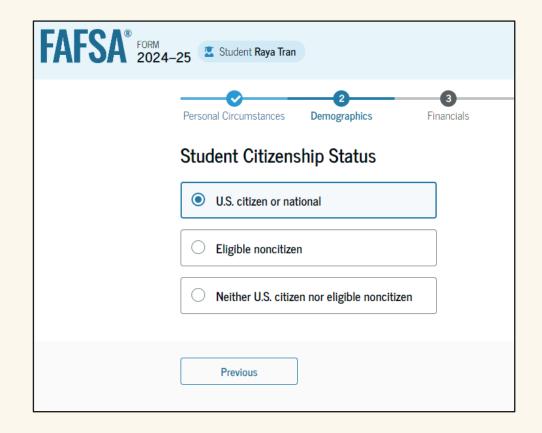
Student Citizenship Status

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

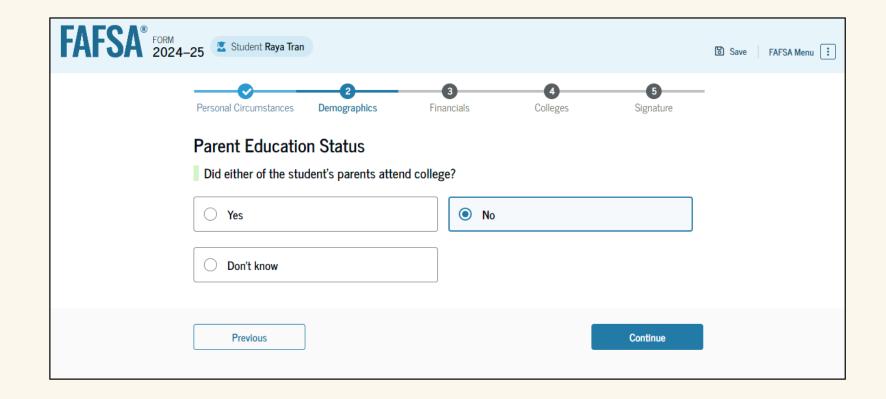
Citizenship status will be verified by:

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



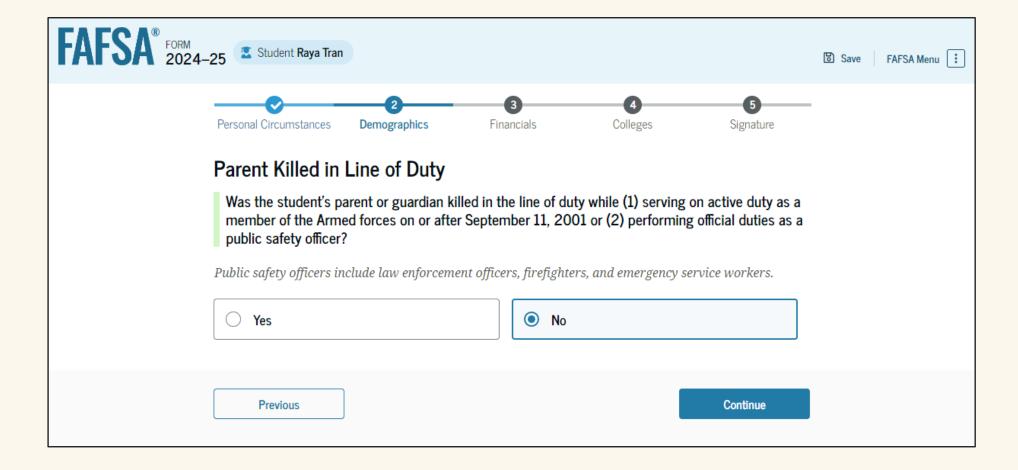


Parent Education Status



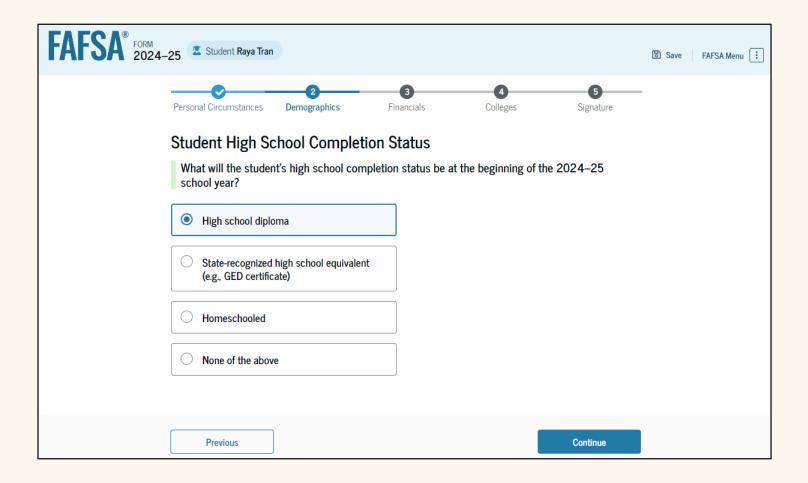


Parent Killed in Line of Duty





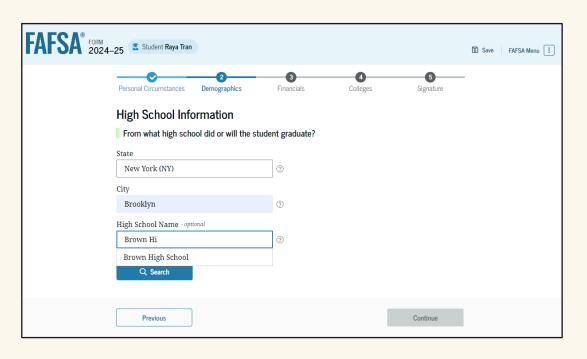
Student High School Completion Status

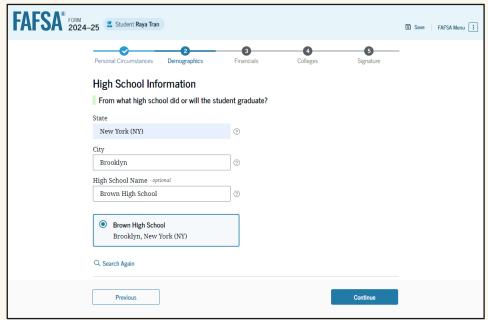




Student High School Information

- 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

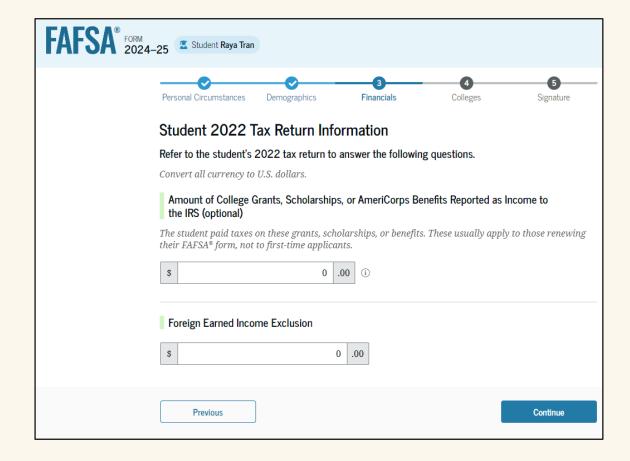






Student Tax Return Info

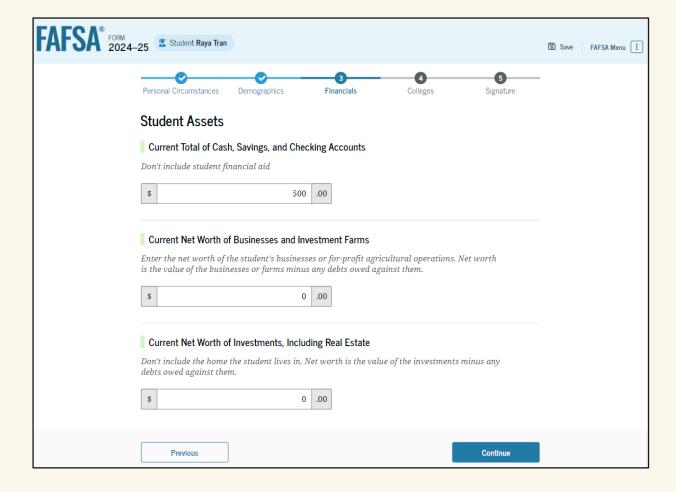
- Questions about the 2022 federal tax return
 - Any grant, scholarship, or AmeriCorps benefit reported as income to IRS
 - Any foreign earned income exclusion
- All other tax return data will be pulled in automatically





Student Assets

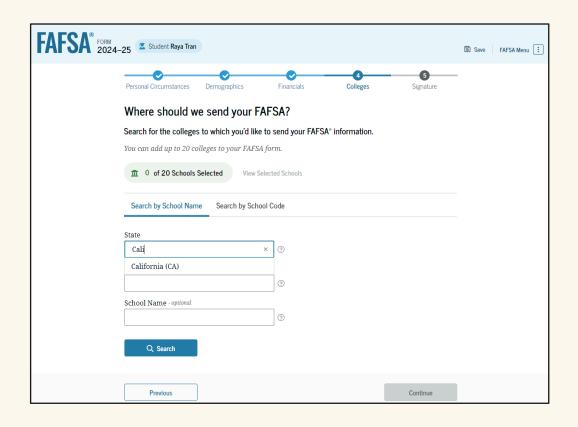
- <u>Current</u> balance of cash, savings, and checking accounts
- Net value of any investments
- Net value of any business or farm

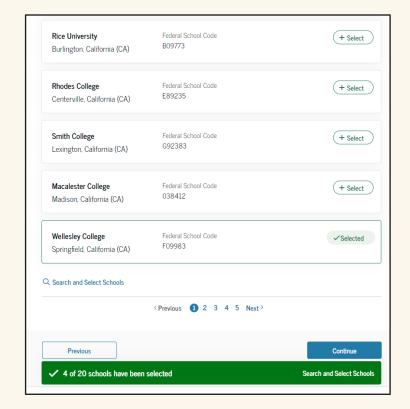




College Search

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

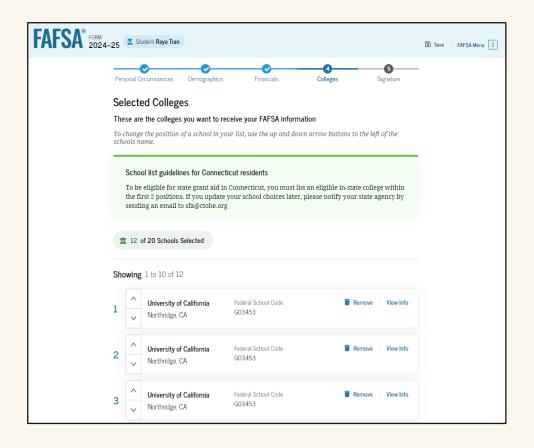


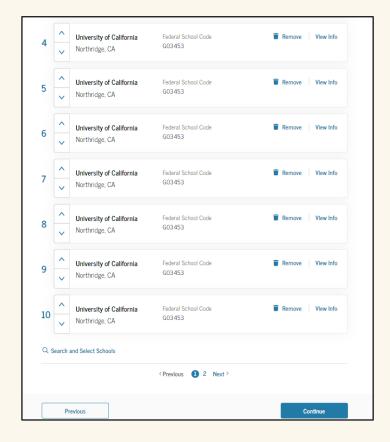




Selected Colleges

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

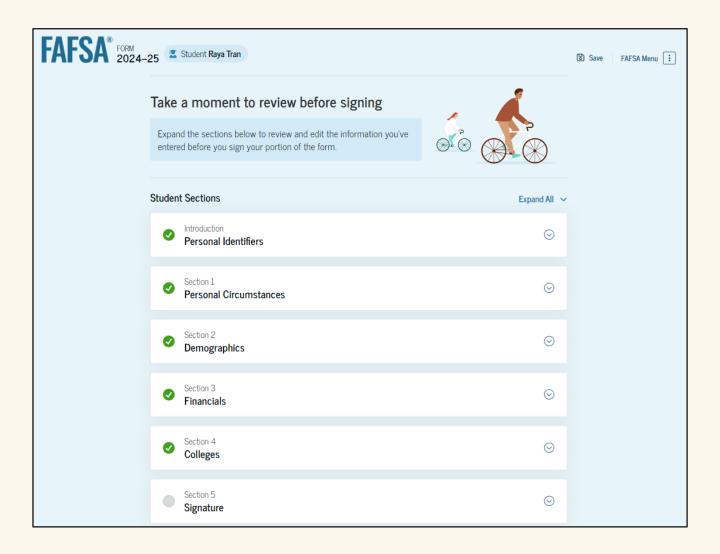






Student Review Page

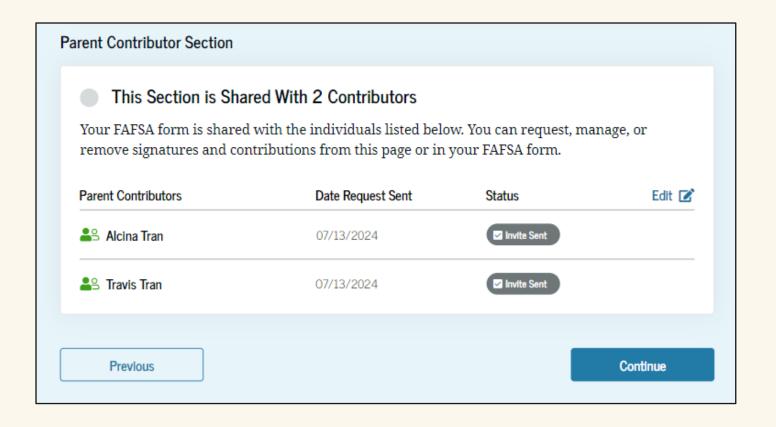
- Can expand all or expand each section
- To edit a response, select the question's hyperlink to be taken to the corresponding page
- Data transferred from the IRS will not display on this page





Contributor Details

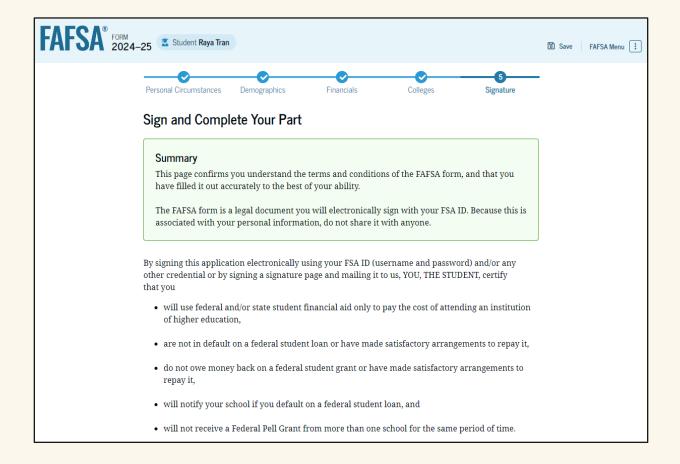
Student sees any Contributors who have been invited and the invitation status





Student Signature

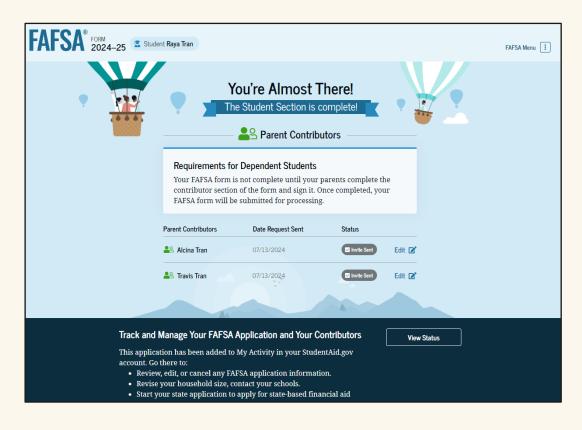
- Student agrees to terms and conditions and can submit the student section
- The FAFSA is not considered complete nor processed until all sections are sent

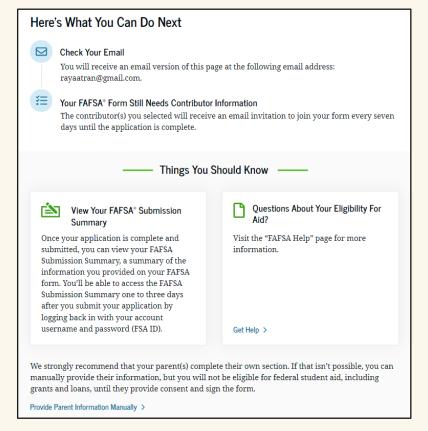




Student Section Complete

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

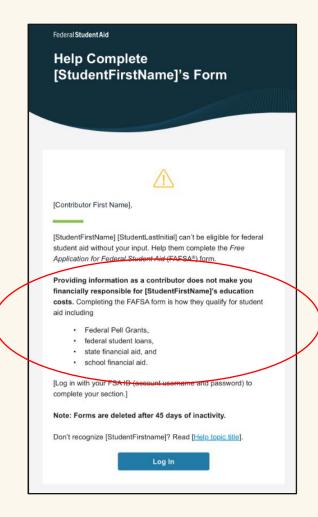


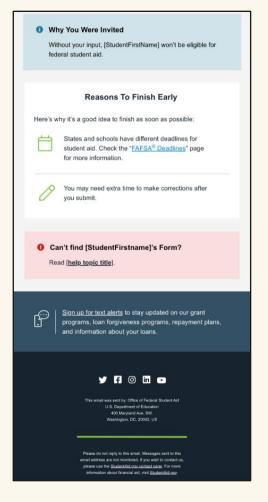




Parent Email Invitation

- 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

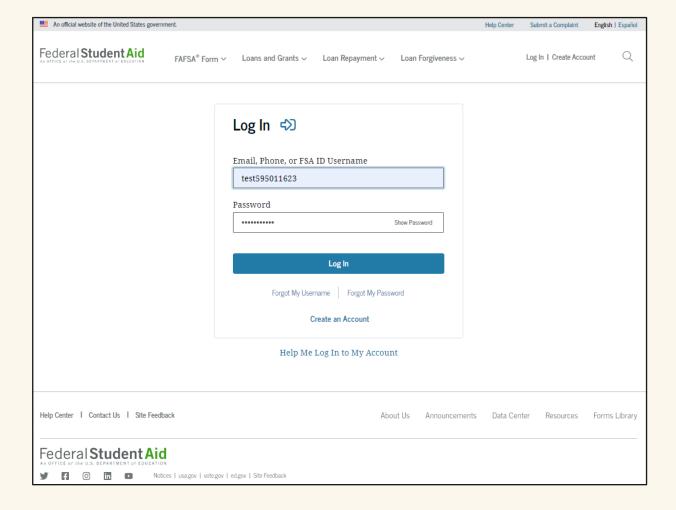






Parent Log-In Page

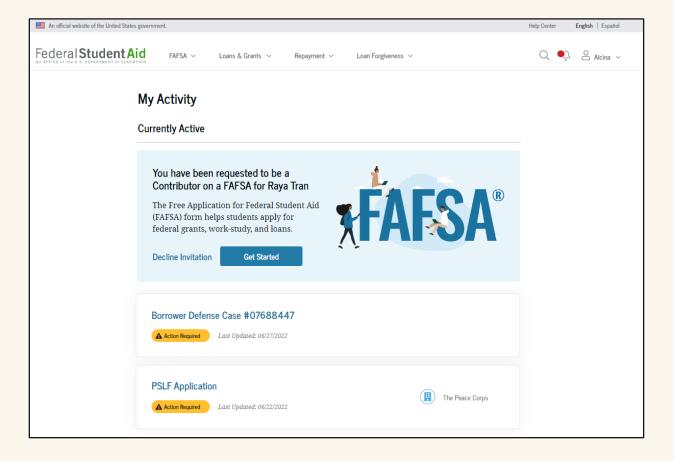
- Parent enters FSA ID
- If parent does not yet have an FSA ID, parent should click Create an Account





Parent Activity Page

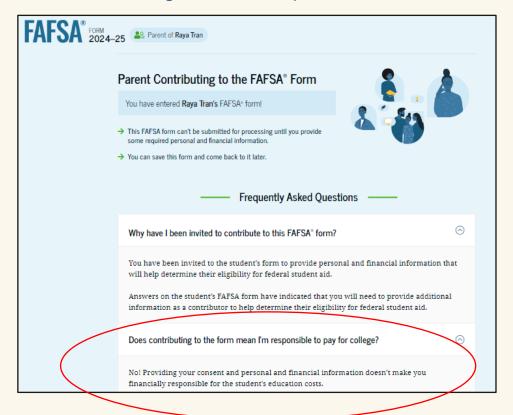
- After logging in, parent is brought to My
 Activity page
- Parent will see an invitation to be a Contributor on the student's FAFSA

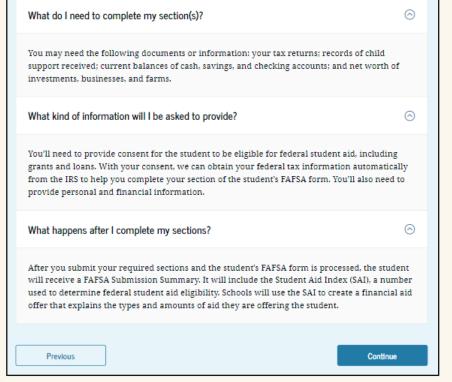




Contributor Role

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

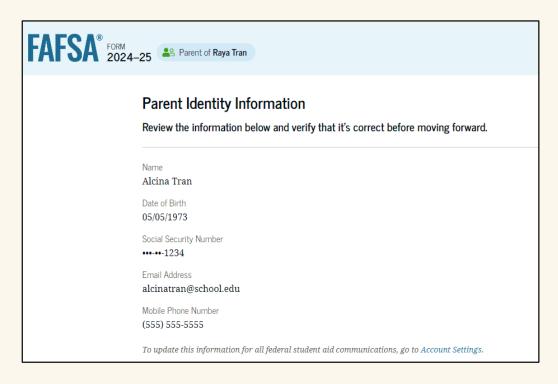


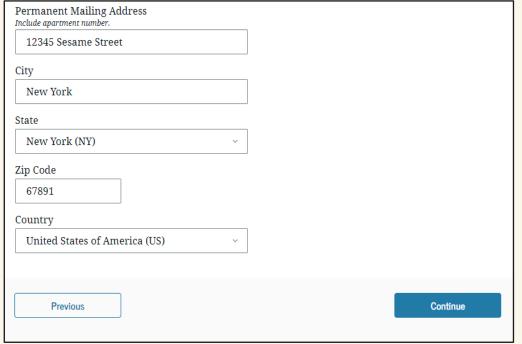




Parent Identity Information

- 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

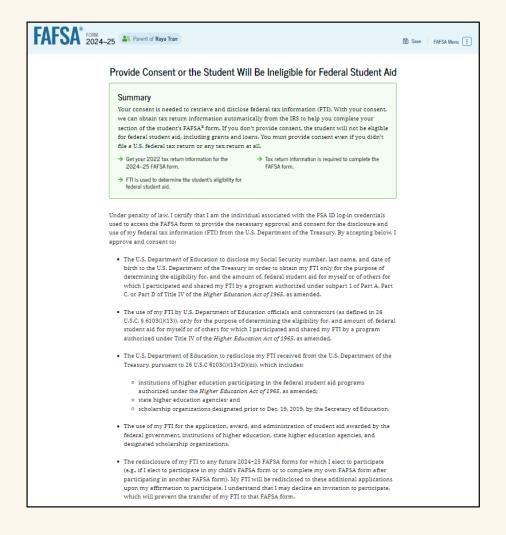






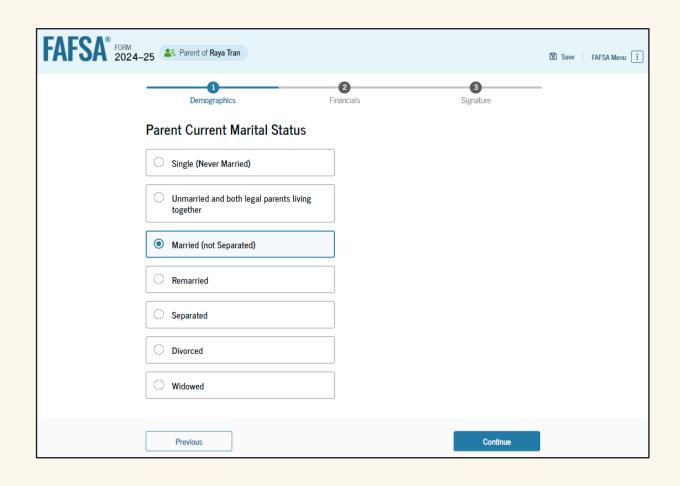
Parent Provides Consent

- 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



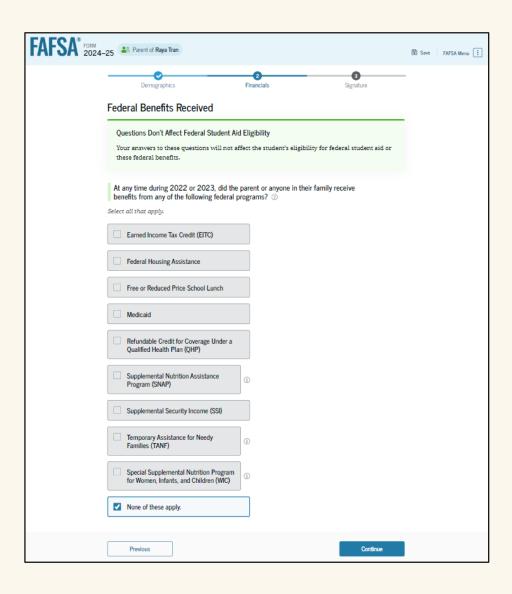


Parent Marital Status



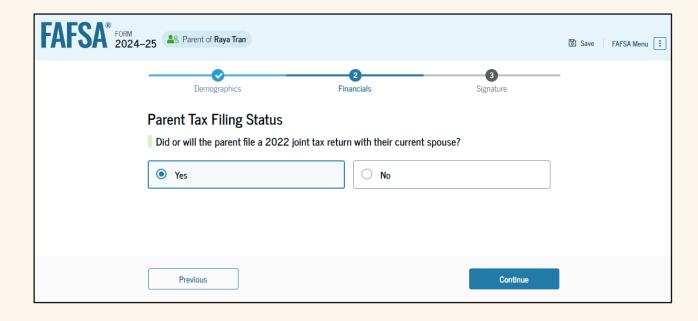


Parent Federal Benefits Received





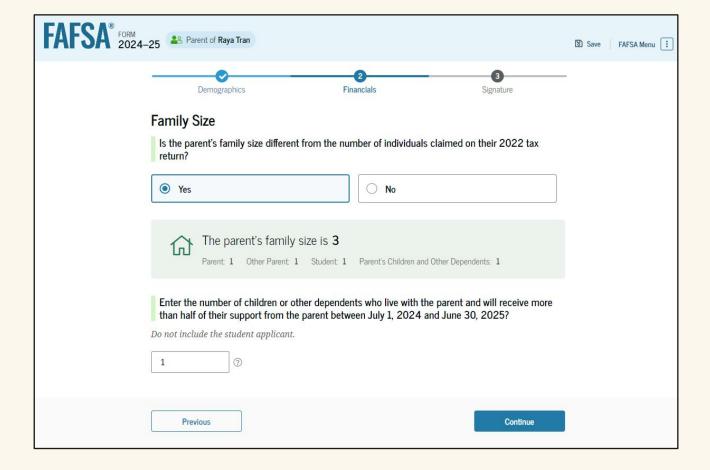
Parent Tax Filing Status





Family Size

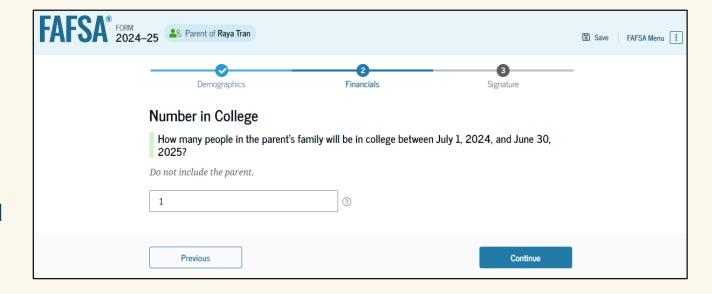
- FAFSA will automatically assume family size based on number of individuals claimed on tax return
- Parents will likely not see this number
- Parents can manually report a number if desired
- Include any dependents who live with the parent and will receive more than half of their financial support from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

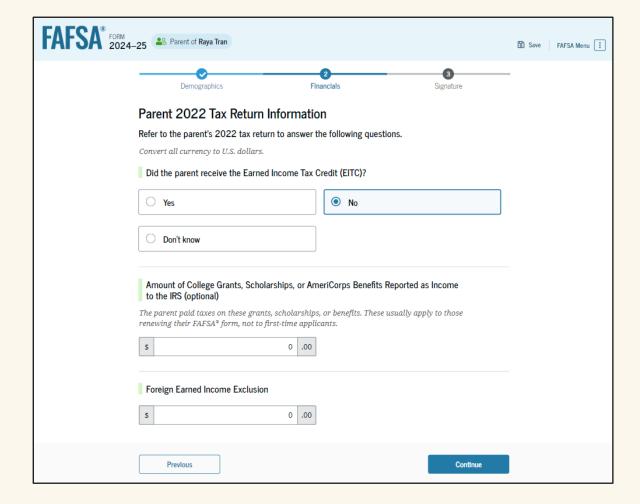




Parent Tax Return Information

Parents asked to report any:

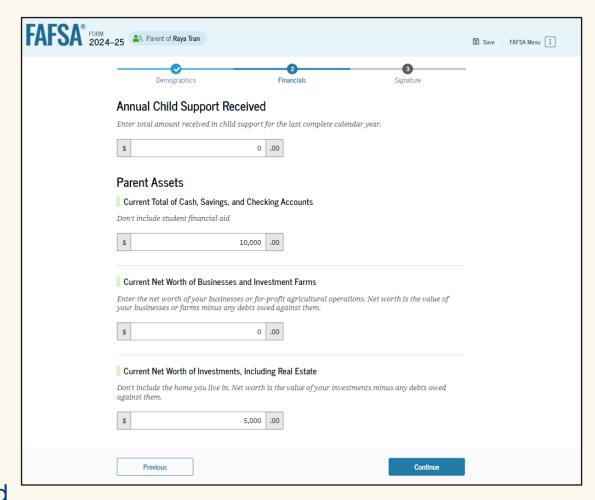
- Earned Income Credit
- Grants, scholarships, or AmeriCorps benefits reported as income
- Foreign earned income exclusion





Parent Assets

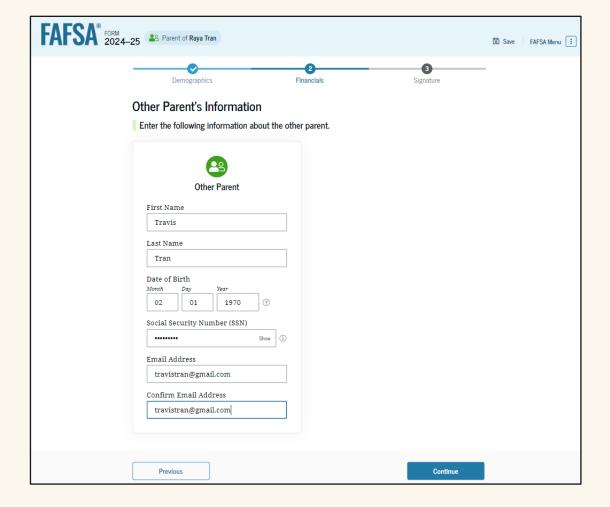
- Annual child support received
- Current balance of cash, savings, and checking accounts
- Net value of investments
 - Real estate
 - Mutual funds, stocks, bonds
 - 529 college savings accounts (only for the student)
 - <u>Exclude</u>: primary home, life insurance, retirement accounts
- Net value of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





Other Parent Information

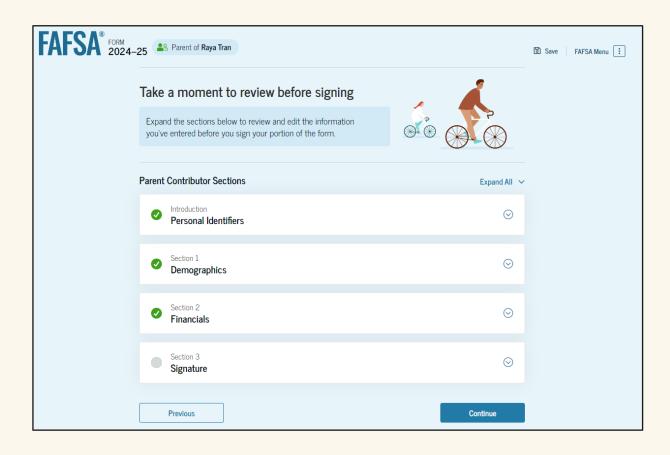
Parent provides information about other parent (if married or living together) or current spouse





Parent Review Page

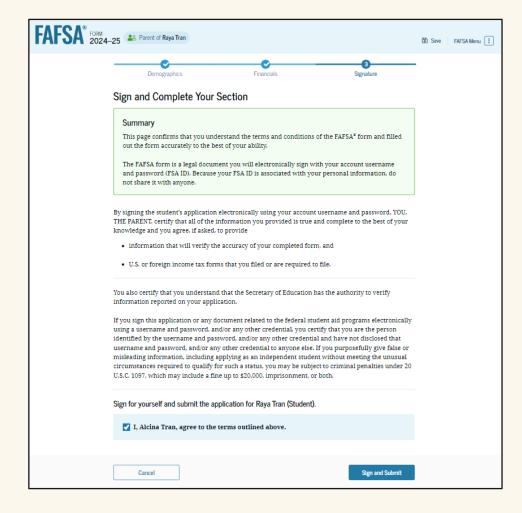
- Can expand all or expand each section
- To edit a response, select the question's hyperlink to be taken to the corresponding page
- Data transferred from the IRS will not display on this page





Parent Signature

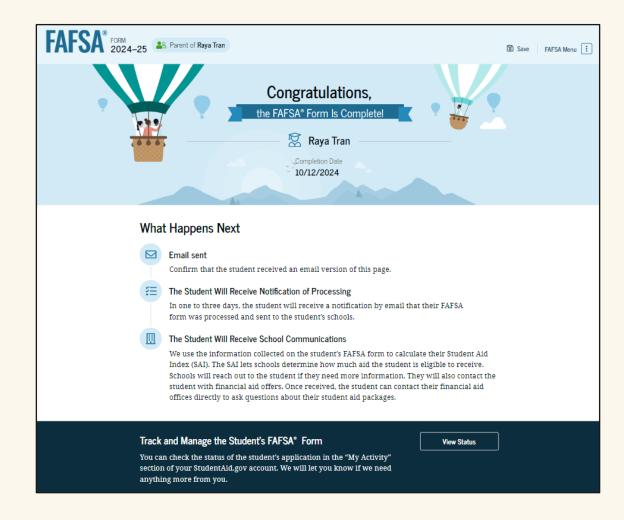
- Parent agrees to terms and conditions and can submit the parent section
- The FAFSA is not considered complete nor processed until all sections are sent





FAFSA Confirmation

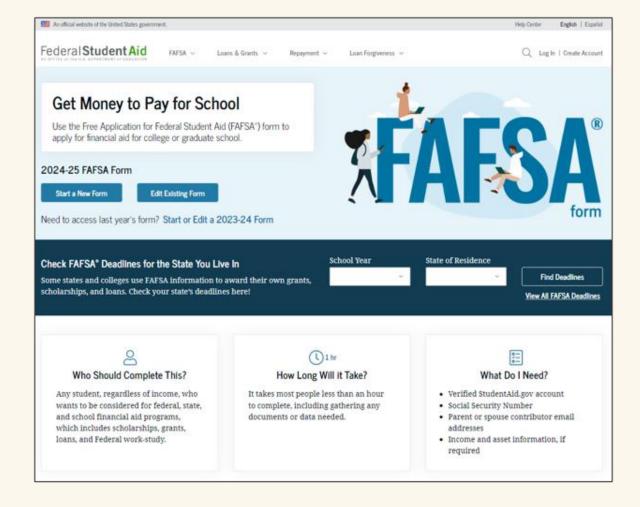
- If parent completed the last required section, the FAFSA will be submitted for processing
- Page provides info on tracking the FAFSA and next steps
- Student will receive an email with detailed confirmation info





Parent Starting the FAFSA First

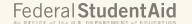
 If parent wants to start FAFSA before the student, clicks Start a New Form on FAFSA homepage fafsa.gov

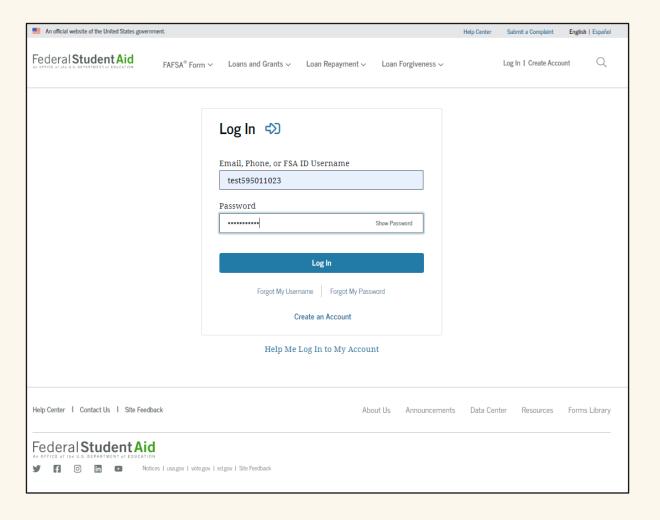




Parent should log in with FSA ID or click

Create an Account to get an FSA ID

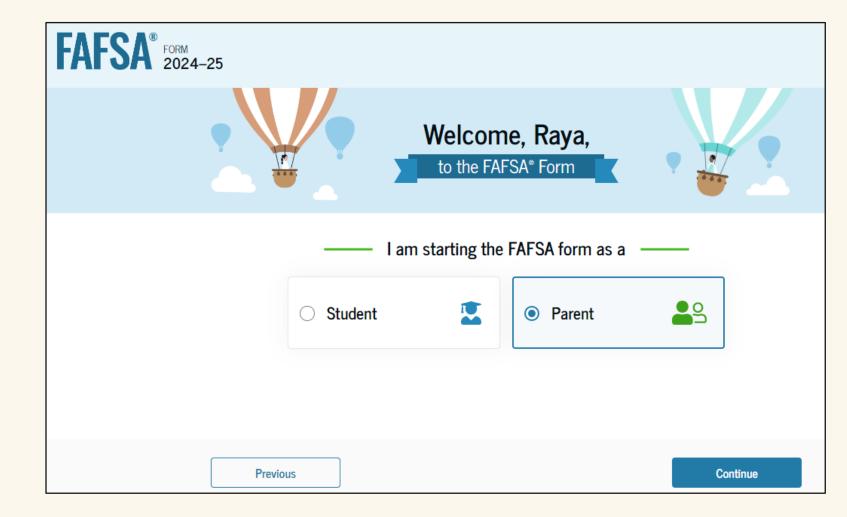






Parent Role

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





Student Information

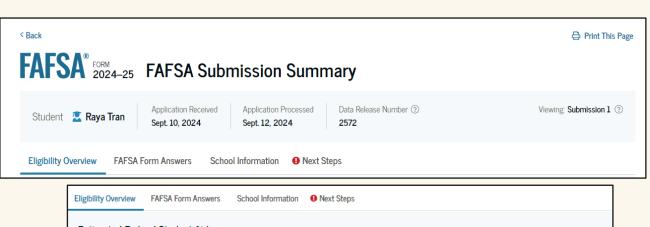
- Parent provides student information
- Since student has not started a FAFSA, student will receive an email
 with notification that a FAFSA has been started on the student's behalf
- Student can then log in, provide consent for IRS data transfer, and sign the FAFSA
- The parent can answer the student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

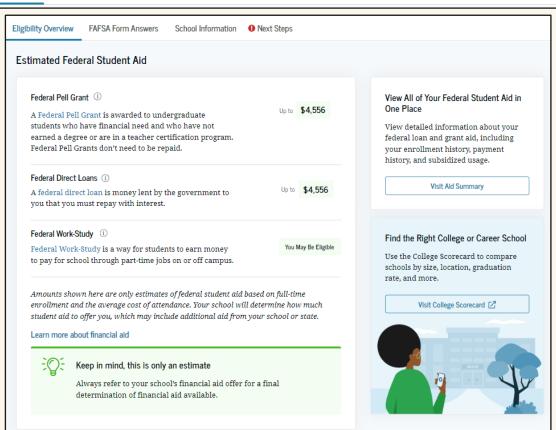
FAFSA FORM 2024–25 Separent of Raya Tran	
	Student Information Provide the information below before moving forward.
	First Name
	Middle Initial Last Name
	Date of Birth
	Month Day Year Social Security Number (SSN)
	HIDE (1)
	Email Address
	Confirm Email Address
	Mobile Phone



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

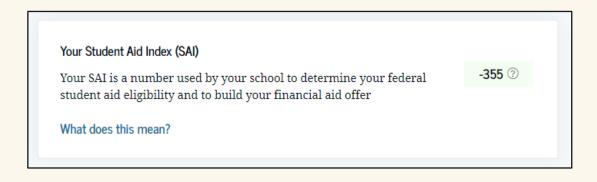


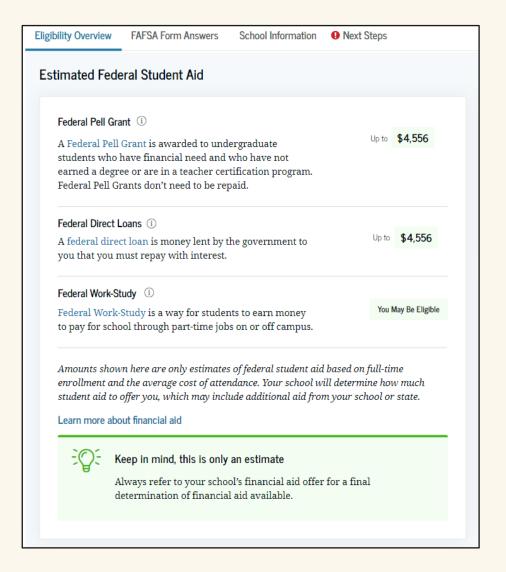




Eligibility Overview

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

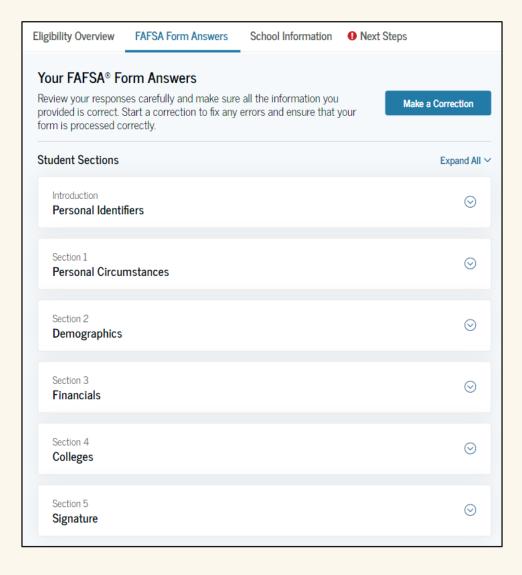






FAFSA Form Answers

- 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

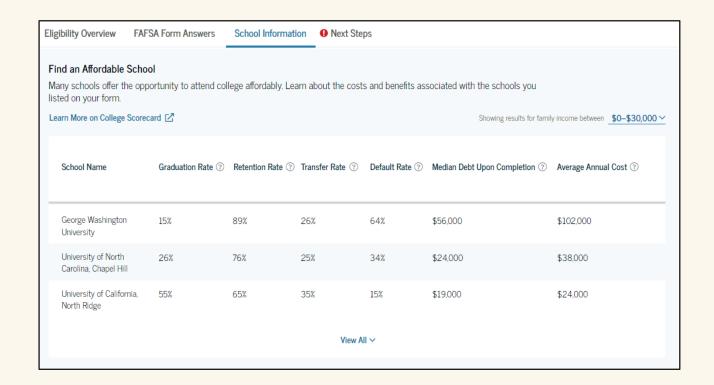




School Information

Student sees the following information for each school selected:

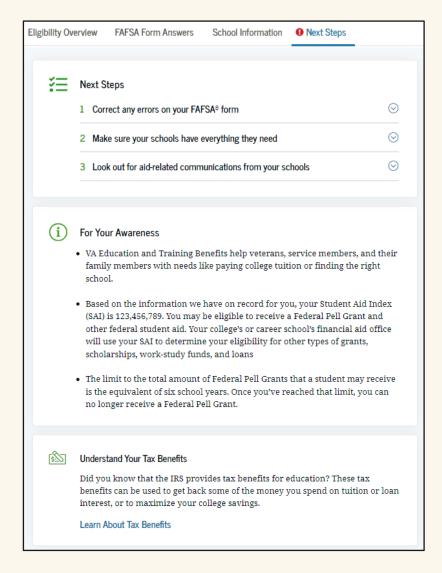
- Graduation rate
- Retention rate
- Transfer rate
- Default rate
- Median debt upon completion
- Average annual cost





Next Steps

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



What Happens After You 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
 - You <u>must</u> comply with Verification to receive federal financial aid
- Colleges send out financial aid offers (typically Mar-April)

National and Community Resources

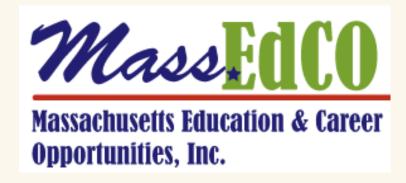
FAFSA Day

- —Free assistance completing the FAFSA
- -Events Oct-Feb
- —More information at <u>FAFSADay.org</u>



Educational Opportunity Centers

- —Free financial aid help
- —MassEdCO.org





- Register for other MEFA webinars at <u>mefa.org/events</u>
- Get an FSA ID for the student and parent(s)
- Research deadlines and required applications
 - -Schools may require applications in addition to the FAFSA
- Complete the FAFSA as soon as it becomes available and other financial aid applications

Upcoming Webinars



Monday, January 22, 2024 5:00 PM



FAFSA Festival

Wednesday, January 24, 2024 4:00 PM



Athletics in College Admissions

Monday, January 29, 2024 6:30 PM



View more events: mefa.org/events

Connect With MEFA On Social Media















Thank You

QUESTIONS?

Call (800)-449-MEFA (6332) or email collegeplanning@mefa.org

