

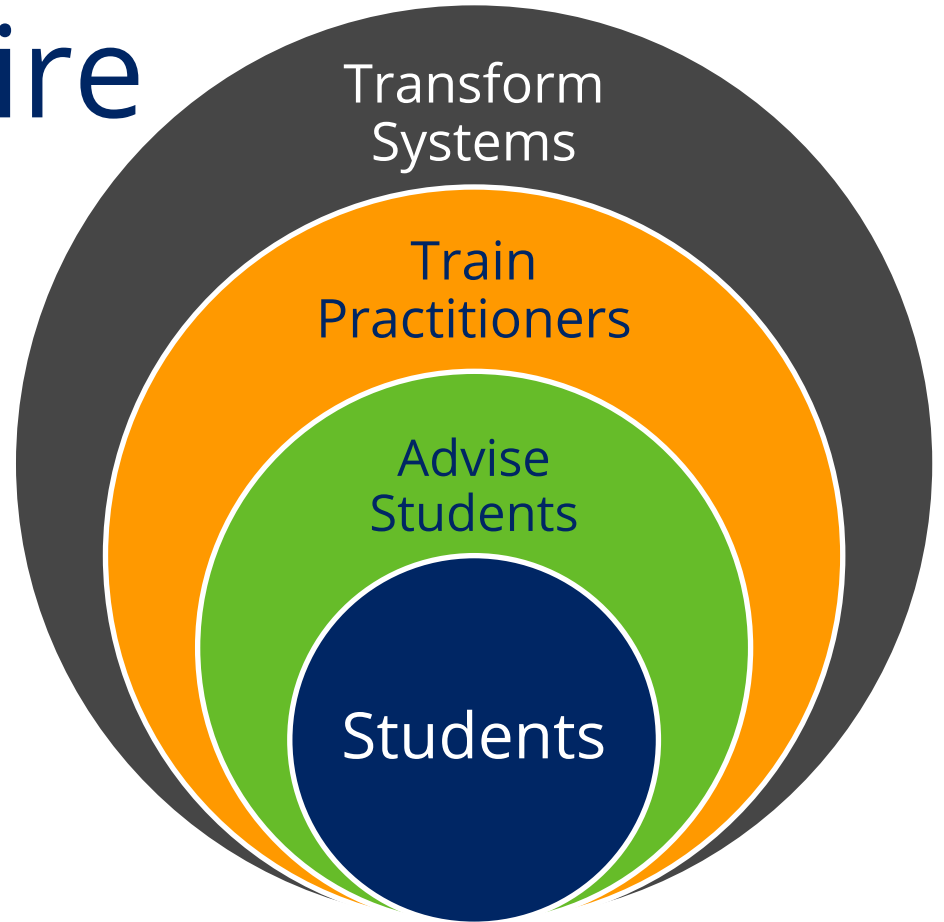


FAFSA Part 1

PA Department of Education

About uAspire

uAspire is a national nonprofit organization hyper-focused on college affordability



Last year, we trained 4,200
college access professionals,
-serving 780,000+ students
across the country.



u-aspire

About Your Trainer



Meghan McComb (she/her)

Training Specialist

- Located in Michigan
- Former advisor with Michigan State University College Advising Corps
- Super into video games!

Agenda

- Pre-Survey
- FAFSA Simplification Overview
- FSA ID Creation
- Dependent Student Walkthrough
 - Personal Circumstances
 - Student Demographics
 - Financial Information
- Post-Survey & Evaluation

Learning Objectives

By the end of today's training, you will be able to:

- Explain the importance of timely FSA ID creation
- Determine whether a student is considered dependent or independent for the purposes of federal student aid
- Identify who should be reported as the parent(s) on a dependent student's FAFSA

Pre-Survey



FAFSA Simplification Overview



Major Changes



- FSA ID required for all users
- Role-based completion
- **IRS Direct Data Exchange (DDX)** replaced Data Retrieval Tool (DRT)
- **Student Aid Index (SAI)** replaced Expected Family Contribution (EFC)

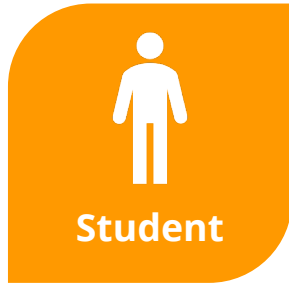
Contributors & FSA ID



What's a Contributor?



- Anyone who is required to provide information on the FAFSA



- Every contributor needs an **FSA ID** to access the FAFSA

FSA ID Creation

- Contributors can create an account username and password on studentaid.gov
- Verified email address required



*Set up ALL forms of
multi-factor authentication*

Protect Your Account with Two-Step Verification

Whenever you sign in, we'll send a secure code to make sure it's really you. To keep your account protected, make sure your phone number and email are verified. We also suggest setting up verification using a secure authenticator app.



Your verified method(s) can now be used to log in.



SMS Verification

5554324567

Verified



Email Verification

john.doe.original@gmail.com

Verified



Authenticator App

Verified



Your authenticator app can now be used to log in.

Undocumented Parents



- Parents without a Social Security Number (SSN) are now able to create an FSA ID
- During account creation, they will have to answer “knowledge-based identity” questions

If successful

Parent’s FSA ID will be verified immediately

If unsuccessful

Parent must complete a manual documentation process

Manual Documentation

- A case number will be automatically generated
- **FSA Information Center:** 1-800-433-3243

Attestation Form

*Available on
studentaid.gov*



Forms of ID:

- Driver's License
- State ID
- Passport

OR

A Utility Bill AND one ID:

- Municipal ID
- Community ID
- Consular ID

Temporary Workaround



- FSA will allow contributors without SSN to temporarily bypass the identity validation process
- Users can contribute immediately, and help their eligible student to submit the FAFSA



Complete manual documentation to ensure successful FAFSA renewal

Tool: FSA ID How-to Guide

uaspire

FSA ID How-to guide

Creating an FSA ID is the first step in completing the FAFSA

What is an FSA ID?

The Federal Student Aid (FSA) ID is a **username** and **password** that is required to log in and access all Federal Student Aid websites, including the **FAFSA**. The FSA ID also serves as a **legal signature** when you submit your FAFSA.

Go to studentaid.gov and click "create account" in the upper right hand corner. The application is available in English and Spanish.

Who should create an FSA ID?

You and **one or both of your parents** must create an FSA ID **before** completing the FAFSA. If you are an independent student, you will not need to have your parent or legal guardian create an FSA ID. If you have a sibling who attended college before you, your parent may already have an FSA ID.

Starting in Fall 2023, every person contributing information to a FAFSA will need an FSA ID - **including parents who do not have a social security number**

What information do I need to create an FSA ID?

- Full name and social security number, as they appear on social security card (if applicable)
- Date of birth
- Valid email address & phone number
- Immediate access to your email account
- Your residential address

Save your FSA ID username and password somewhere safe.

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Dependent Student Walkthrough



Available in English
and Spanish

A Better 2024–25 FAFSA Form

The FAFSA form is available for short periods of time while we monitor site performance and update the form to provide you with a better experience. [Learn more about the 2024–25 FAFSA form.](#)



2024–25 FAFSA® Form

Start New Form

Access Existing Form

Need to access last year's form? [Start](#) or [Edit a 2023–24 FAFSA Form](#)

An official website of the United States government. Help Center Submit a Complaint English | Español

Federal Student Aid AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION FAFSA® Form ▾ Loans and Grants ▾ Loan Repayment ▾ Loan Forgiveness ▾ Log In | Create Account

Log In ↗

Email, Phone, or FSA ID Username

Password
 Show Password

[Log In](#)

[Forgot My Username](#) | [Forgot My Password](#)

[Create an Account](#)

[Help Me Log In to My Account](#)

Help Center | Contact Us | Site Feedback About Us Ann

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FSA ID required to log in

If needed, users can create an FSA ID and use it immediately to start the FAFSA



———— I am starting the FAFSA form as a ————

Student 

Parent 

In **Part 1**, we will walk through the questions a **dependent student** will see when starting the FAFSA

In **Part 2**, we will walk through the questions **parent(s)** will see when invited as contributor(s)



Understanding the FAFSA® Form

1 of 4

What is the FAFSA® form?

Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for grants, scholarships, work-study funds, and loans for college or graduate school.



Onboarding pages provide an overview of the FAFSA process

Previous

Continue

Student Identity Information

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

Name
Raya A. Tran

Date of Birth
05/05/1995

Social Security Number
•••••1234

Email Address
rayaatran@gmail.com

Mobile Phone Number
(555) 555-5555

If any info is incorrect,
must update within FSA ID
account settings

To update this information for all federal student aid communications, go to [Account Settings](#).

Permanent Mailing Address

Include apartment number.

12345 Sesame Street

City

New York



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[®] form. If you don't provide consent, you will not be eligible for federal student aid, including grants and loans. You must provide consent even if you didn't file a U.S. federal tax return or any tax return at all.

→ Get your 2022 tax return information for the 2024-25 FAFSA form.

→ Tax return information is required to complete the FAFSA form.

→ FTI is used to determine your eligibility for federal student aid.

Under penalty of law, I certify that I have authorized the use of my federal tax information for the use of my federal tax information, and I approve and consent to:

- The U.S. Department of Education and its contractors (as defined in 26 U.S.C. § 6103(d)(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

All contributors
to having the

Information transferred
automatically from the IRS

Consent is **required**
to be eligible for
federal student aid

Personal Circumstances



1

Personal Circumstances

2

Demographics

3



Financials

4

Colleges

5

Signature

FAFSA[®]
FORM
2024–25 Student **Raya Tran** SaveFAFSA Menu 

Your Personal Circumstances

Tell us about your marital status; your financial dependencies; your plans for college; and any other special circumstances that may impact your aid eligibility (including if you've been homeless or at risk of becoming so).

- This information can affect how much aid you're eligible to receive.
- Based on your answers, we may need to collect additional information from other people.

[Previous](#)[Continue](#)

Please chat in...



In which types of situations do you think a student would be independent on the FAFSA?

A student is independent if they:

Will be 24 by January 1 of award year

Are married 


Are working on a master's or doctorate

Serve in the U.S. armed forces or are a veteran

At any time after age 13 - were an orphan, ward of the court, or in foster care

Are an emancipated minor

Have a court-ordered legal guardian

Have children or dependents who live with and receive more than half their support from them 

Are an unaccompanied youth who is homeless

Students with Dependents

- **Past:** “Do you now have or will you have children who receive half of their support from you?”
- **Now:** Must live with and be providing more than 50% financial support now and during the FAFSA year
- **Examples:** income from work, WIC, SNAP benefits, TANF, child support paid, etc.



Determining Homelessness

Students must meet **both** conditions to be considered independent

Homeless

Lacking fixed, regular, and adequate housing



Unaccompanied

Not in the physical custody of a parent or guardian

A student is independent if they:

Will be 24 by January 1 of award year

Are married 


Are working on a master's or doctorate

Serve in the U.S. armed forces or are a veteran

At any time after age 13 - were an orphan, ward of the court, or in foster care

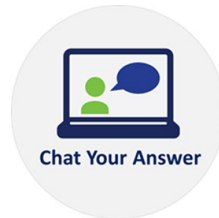
Are an emancipated minor

Have a court-ordered legal guardian

Have children or dependents who live with and receive more than half their support from them 

Are an unaccompanied youth who is homeless

Check for Understanding

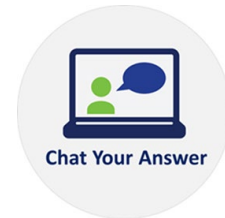


- Jaclyn (age 20) and her mom have been living together in a homeless shelter for the past 6 months. Is Jaclyn dependent or independent?

A. Dependent

B. Independent

Check for Understanding



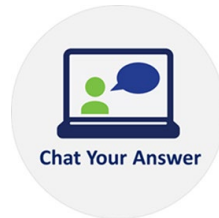
- Avery (age 18) has a baby and lives at home with their parents. Avery's parents support them both financially. Is Avery dependent or independent?
 - A. Dependent
 - B. Independent

Check for Understanding



- Simone was in foster care from ages 13 to 15. She is now 17 and living with her biological parent. Is Simone dependent or independent?
 - A. Dependent
 - B. Independent

Check for Understanding



- Josh (age 19) lives with his uncle, who is not his legal guardian. He hasn't had contact with his parents in over 10 years.

A. Dependent

B. Independent





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? ⓘ

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;*
- *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.*

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.

Yes

If **Yes**, the student can submit the FAFSA with a **provisional independent** status and must follow up with the financial aid office

Student Dependency Status



Dependent Student

The student is a dependent student. This means information about the student's parent(s) must be provided on the FAFSA® form. This information helps determine how much federal student aid the student is eligible to receive.

Apply for a Direct Unsubsidized Loan Only

Are the student's parents unwilling to provide their information, but the student doesn't have an unusual circumstance that prevents them from contacting or obtaining their parents' information? ⓘ

*If you select "Yes," a financial aid administrator at the student's school will determine their eligibility for a Direct Unsubsidized Loan **only**.*

Yes

No

First-year students can qualify for \$5,500 in Direct Unsubsidized Loans

Parent Information



Who is My Parent?



- A series of questions will help determine who is the parent on the FAFSA
- “Parents” are legal (biological or adoptive) parent



*Determine contributor(s)
before starting the FAFSA*



Are your parents married to each other?

NO

Do your parents live together?

NO

Which parent provided **more financial support** in the last 12 months?*

Is this parent remarried?

YES

YES

YES

NO



2 Report BOTH parents' information

2 Report BOTH parent and stepparent's information

1 Report ONLY this parent's information

**If equal, report the parent with the greater income and assets*

Check for Understanding



- Mario lives with his parents, who are not legally married. His dad is unemployed, and his mom supports the family financially. Which parent(s) must report their info on Mario's FAFSA?

Answer: Both parents

Check for Understanding



- Destiny's parents are divorced. She lives with her mom who claims her on their 2022 taxes. Her dad, who recently remarried, provides most of Destiny's financial support. Which parent(s) must report their info on Destiny's FAFSA?

Answer: Dad and stepparent

Check for Understanding



- Isaac lives with his uncle who is not his legal guardian. Isaac's parents are separated and live out of state. They provide an equal amount of financial support for Isaac. Which parent(s) must report their info on Isaac's FAFSA?

Answer: Parent with the greater income and assets

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

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



Parent



Critical:
Used to invite and connect
to contributor's portion

Social Security Number (SSN)

Hide

My parent doesn't have an SSN.

Address

City

State

Zip Code

Country

Send Invite

First Name

Last Name

Date of Birth

Month Day Year

Social Security Number (SSN)

Hide

My parent doesn't have an SSN.

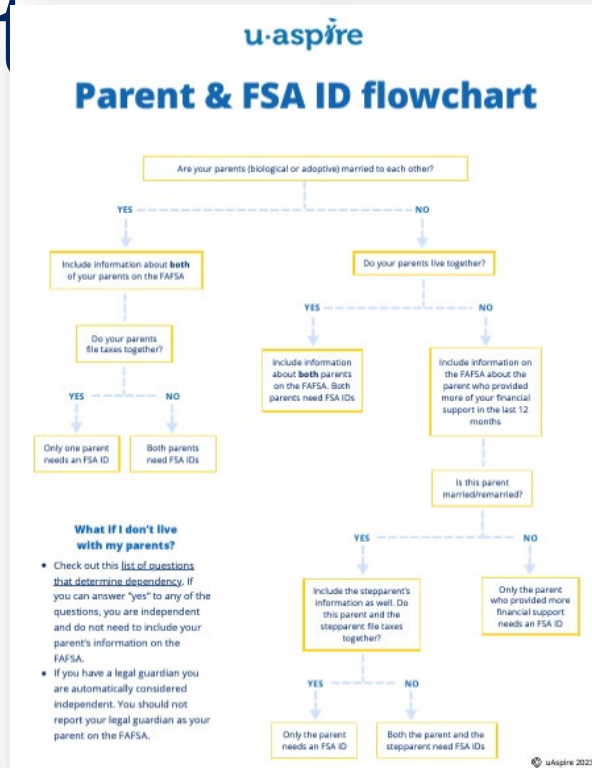
Email Address

Confirm Email Address

Send Invite

If parent(s) lives
outside of the US,
they can enter
Foreign Country

Tool: Parent & FSA ID Flowchart



Student Demographics





FAFSA[®] FORM
2024–25

Student **Raya Tran**

Save

FAFSA Menu

Student Demographics

We'll ask questions about you and your parent(s). Some of these questions will help determine how much federal student aid you may be eligible to receive for school.



Previous

Continue

Student Demographic Information

Questions Used for Research Purposes Only and Do Not Affect Federal Student Aid Eligibility

Your answers will not

- affect the student's eligibility for federal student aid,
- be used in any calculations, and
- be shared with the schools to which the student applies.

Demographic survey questions will **NOT** impact eligibility

What is the student's gender?

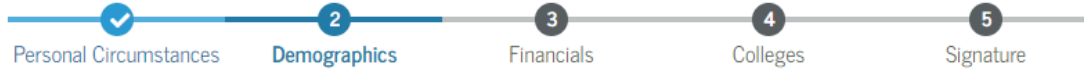
Male

Female

Nonbinary or another gender

Prefer not to answer

It's okay to select "Prefer not to answer"



Student Citizenship Status

- U.S. citizen or national
- Eligible noncitizen
- Neither U.S. citizen nor eligible noncitizen

How should students answer this question?

Previous

Continue

Eligible Noncitizen

- U.S. permanent residents
- Individuals with an I-94 showing: Refugee, Asylee, Cuban-Haitian Entrant, or Parolee
- Victims of human trafficking (T-Visa)
- Battered immigrants and children



U.S. Customs and Border Protection Securing America's Borders	
Get I-94 Number	I-94 FAQ
Admission (I-94) Number Retrieval	
Admission (I-94) Record Number: 69000888062	
Admit Until Date (MM/DD/YYYY): 10/10/2012	
Details provided on Admission(I-94) form:	
Family Name:	LI
First (Given) Name:	LYDIA
Birth Date (MMDD/YYYY):	01/01/1990

Tips for Undocumented Students

- Research state financial aid
- Contact colleges about institutional aid
- Apply for scholarships




Financial Information






FAFSA[®]
FORM
2024–25

 Student **Raya Tran**

 Save

FAFSA Menu 

Your Finances

The FAFSA form helps schools determine your ability to pay for college without financial aid, so we ask in this section if you receive any federal or state entitlement benefits and if you have any investments, real estates, or other assets.



Previous

Continue

Federal Tax Information



The **Direct Data Exchange (DDX)** replaced the IRS Data Retrieval Tool (DRT) as the process for transferring tax information from the IRS



This will **reduce** the number of financial questions that most families will see on the FAFSA

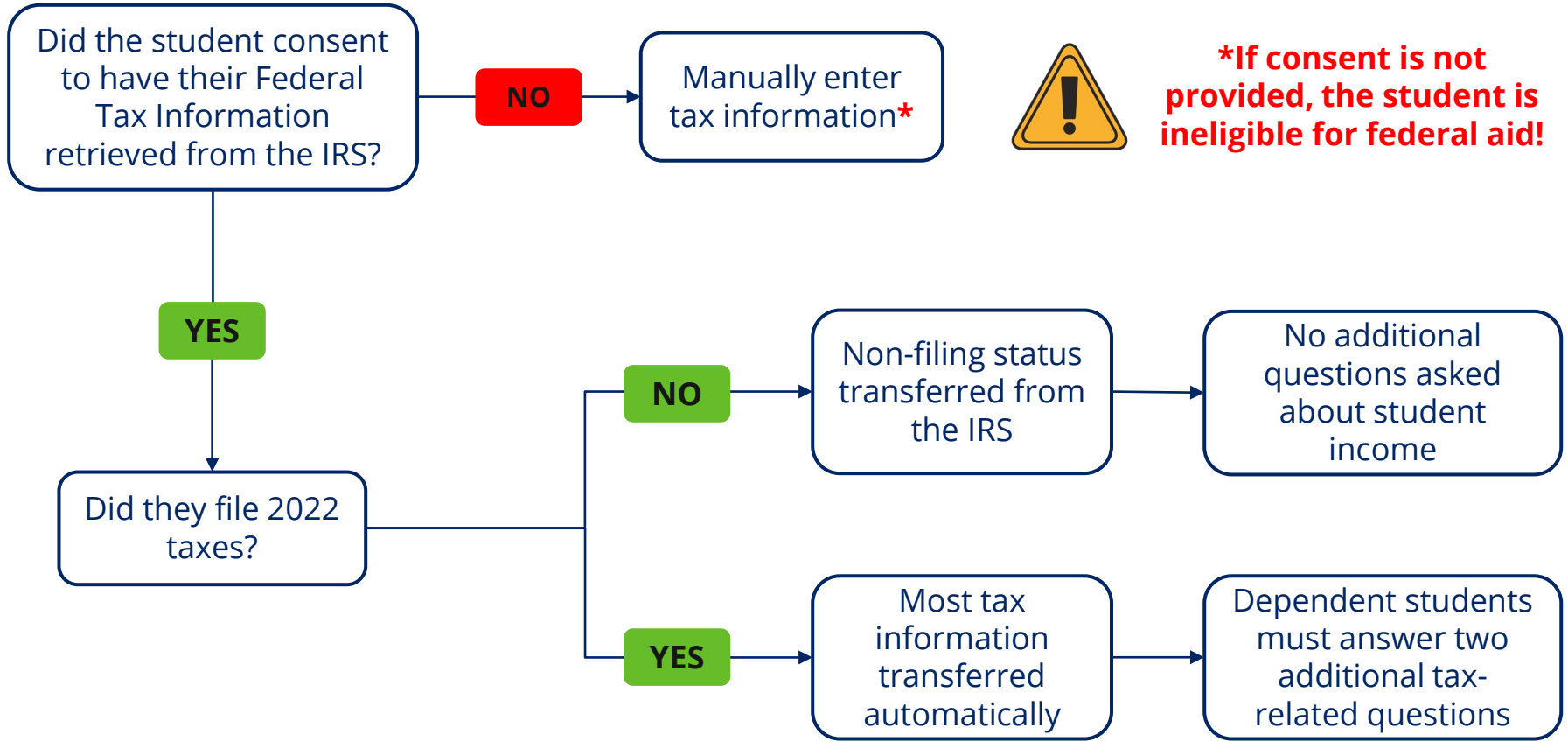
Direct Data Exchange FAQ

Can I see what was pulled from the IRS?

No, users are unable to see what federal tax information data that was pulled from the IRS

How would I know if DDX worked?

FAFSA will not have an indicator, the questions are automatically skipped



Student Tax Questions

Amount of College Grants, Scholarships, or AmeriCorps Benefits Reported as Income to the IRS

The student paid taxes on these grants, scholarships, or benefits. These usually apply to those renewing their FAFSA[®] form, not to first-time applicants. If married, include amount student's spouse received.

\$	0	.00	ⓘ
----	---	-----	---

Found on Schedule 1
Line - 8r

Foreign Earned Income Exclusion

\$	0	.00	ⓘ
----	---	-----	---

Found on Schedule 1
Line - 8d

Student Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student financial aid.

\$	<input type="text"/>	.00	ⓘ
----	----------------------	-----	---

Asset information is required if family AGI is more than \$60,000

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.

\$	<input type="text"/>	.00	ⓘ
----	----------------------	-----	---

If a dependent student starts the FAFSA, they will always see the asset questions

Current Net Worth of Businesses and Investment Farms

Enter the net worth of the student's businesses or for-profit agricultural operations minus any debts owed against them.

\$	<input type="text"/>	.00	ⓘ
----	----------------------	-----	---

More to come in FAFSA Part Two

College Selection





Personal Circumstances



Demographics



Financials


4

Colleges


5

Signature

FAFSA[®]
FORM
2024-25

 Student **Raya Tran**

 Save

FAFSA Menu 

Your Colleges

In this section, you'll search for and select schools you're considering so they will automatically receive an electronic copy of your FAFSA form. You don't need to worry if you don't end up applying to them - there is nothing else you need to do.



Previous

Continue



Selected Colleges

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 arrows next to the school's name.

State aid eligibility requirement



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

12 of 20 Schools Selected

Showing 1 to 10 of 12

1	<input type="button" value="^"/> <input type="button" value="v"/>	University of California Northridge, CA	Federal School Code G03453	
2	<input type="button" value="^"/> <input type="button" value="v"/>	University of California Northridge, CA	Federal School Code G03453	<input type="button" value="Remove"/> <input type="button" value="View Info"/>
3	<input type="button" value="^"/> <input type="button" value="v"/>	University of California Northridge, CA	Federal School Code G03453	<input type="button" value="Remove"/> <input type="button" value="View Info"/>

Students can add up to **20 colleges** at a time

Signature & Next Steps





Personal Circumstances

Demographics

Financials

Colleges

Signature

FAFSA[®] FORM 2024-25

Student **Raya Tran**

Save | FAFSA Menu

Take a moment to review before signing

Expand the sections below to review and edit the information you've entered before you sign your portion of the form.



Student Sections

Expand All

- ✔ Introduction
Personal Identifiers
⊖
- ✔ Section 1
Personal Circumstances
⊖
- ✔ Section 2
Demographics
⊖
- ✔ Section 3
Financials
⊖
- ✔ Section 4
Colleges
⊖
- Section 5
Signature
⊖



Sign and Complete Your Part

Summary

This page confirms you understand the terms and conditions of the FAFSA form, and that you have filled it out accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your FSA ID. Because this is associated with your personal information, do not share it with anyone.

By signing this application electronically using your FSA ID (username and password) or another credential or by signing a signature page and mailing it to us, YOU, THE SIGNER, agree that you

- will use federal and/or state student financial aid only to pay the cost of attending an eligible institution of higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.

Can't submit until all contributors have completed their part



You're Almost There!

The Student Section is complete!





Parent Contributors

Requirements for Dependent Students

Your FAFSA form is not complete until your parents complete the contributor section of the form and sign it. Once completed, your FAFSA form will be submitted for processing.

Can edit contributor information if needed

Parent Contributors	Date Request Sent	Status
 Alcina Tran	07/13/2024	Invite Sent Edit
 Travis Tran	07/13/2024	Invite Sent Edit

Track and Manage Your FAFSA Application and Your Contributors

[View Status](#)

This application has been added to My Activity in your StudentAid.gov account. Go there to:

FAFSA Part Two Preview

Parent
Walkthrough

Submission &
Follow-up

Other FAFSA
Scenarios

Student Aid Index
(SAI)

Post-Survey & Evaluation



Post-Survey



Evaluation & Questions



Thank You!



Financial aid information is constantly changing.
The content presented here reflects the best of
uAspire's understanding at the time of publication.