



FAFSA: Free Application for Federal Student Aid

We invite you to share these materials with students and families. Please attribute these materials to The Scholarship Foundation of St. Louis and link back to the original source on the Foundation's website to ensure students and families have the most accurate, up-to-date information.

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Objectives

- Understand **acronyms and jargon** associated with the FAFSA (Free Application for Federal Student Aid).
- Recognize the **how, why, and when** of FAFSA filing.
- Identify the **correct FAFSA website** and the form itself.
- Recognize various FAFSA nuances and common pitfalls; understand how to address **unique family and financial situations** when completing the FAFSA—and, what to do if your situation cannot be addressed within the form itself.
- Learn who to contact and how to proceed if your **financial circumstances have changed** and need to be communicated to the college for additional consideration.
- Determine what **information and/or documents** are needed to complete the FAFSA and understand where to obtain this information.
- Become familiar with **dependency questions**.

Objective 1: Understand Acronyms & Jargon

What...

...is the FAFSA?

The FAFSA is the **Free Application for Federal Student Aid**; for students eligible to file a FAFSA, it is the most critical part of the financial aid application process. The FAFSA, which is a form, is used to determine the amount of money (or EFC) a family can “reasonably contribute” toward the cost of attending a postsecondary institution. The results from the FAFSA are used in the awarding of federal and state grants, work-study, and loans.

...is an FSA ID?

This is a Federal Student Aid Identification, which is used to access all Federal Student Aid websites, including <https://studentaid.gov/h/apply-for-aid/fafsa>. The FSA ID consists of a user-created Username and Password. The student can create an FSA ID at any point prior to or after starting their FAFSA at <https://studentaid.gov/fsa-id/sign-in/landing>. The student and, if student is dependent, a parent will require an FSA ID to complete the FAFSA. ***For a list of dependency questions to help determine dependency status, please see page 38.*** Additionally, please see pages 39-40 for more information on the FSA ID.

...is a SAR?

The SAR is the **Student Aid Report**; it is a summary (approximately five pages) of all the information entered on the FAFSA. The EFC can be found at the top right corner, on the first page of the SAR. Once the FAFSA is processed, the student will receive an email stating the Student Aid Report is ready. If you need to access the SAR, you can find guidance on how to download here: <https://sfstl.org/wp-content/uploads/2022/01/Guide-to-Download-SAR-1.2022.pdf>.

...is an EFC?

The EFC stands for **Expected Family Contribution**. It is an indicator of a family’s ability to pay towards the student’s education. It is also used by financial offices to determine a student’s eligibility for federal, state, and some institutional financial aid during one school year. The 2023-24 FAFSA is the final year where the output from a completed, processed FAFSA is an EFC.

...is a SAI?

The SAI is **Student Aid Index**. This will replace the Expected Family Contribution beginning in 2024-25. It will be the output of a processed FAFSA and will be used to help determine a student’s eligibility for federal aid eligibility.

Objective 2: Know the How, Why, & When of FAFSA

How:

Students should begin by visiting <https://studentaid.gov/fsa-id/sign-in/landing> to create their FSA ID Username and Password. The FSA ID allows students to securely access their FAFSA, as well as other Federal Student Aid websites.

After creating the FSA ID, students can file a FAFSA at <https://studentaid.gov/h/apply-for-aid/fafsa>. **REMINDER:** The FAFSA is FREE; *do not complete the FAFSA at any other website, no matter how much “easier” that site promises to make the process—you may be asked to pay.*

Students must file a FAFSA for every year they hope to receive Federal Student Aid; this is not a one-time form.

Why:

Filing a FAFSA, for students who are eligible to do so, is the single most important part of the financial aid process. The FAFSA is the primary application for federal aid, need-based state aid, and some institutional aid. (**NOTE:** *Students ineligible to file a FAFSA or who are unsure if they can file should contact The Scholarship Foundation for assistance*).

It is very important for students to file a FAFSA as early as possible; some financial aid is first-come, first-served.

When:

The FAFSA for the next academic year opens October 1st each year. Students filing for 2023–24 can file their FAFSA on or after October 1st, 2022. **REMINDER:** Some aid is first-come, first-served.

In Illinois, state need-based aid is awarded on a first-come, first-served basis; filing ASAP is crucial. In Missouri, state need-based aid (Access Missouri) requires that a FAFSA be filed no later than **February 1st** for **guaranteed** consideration.

Many colleges have priority financial aid deadlines. Make sure you meet these deadlines; while researching these deadlines, find out if your college requires any other financial aid paperwork, such as the **CSS Profile**. The CSS Profile is used by some colleges to award institutional aid; you can learn more and view a list of college that require it here:

<https://cssprofile.collegeboard.org/>.

Objective 3: Identify the Correct FAFSA Website

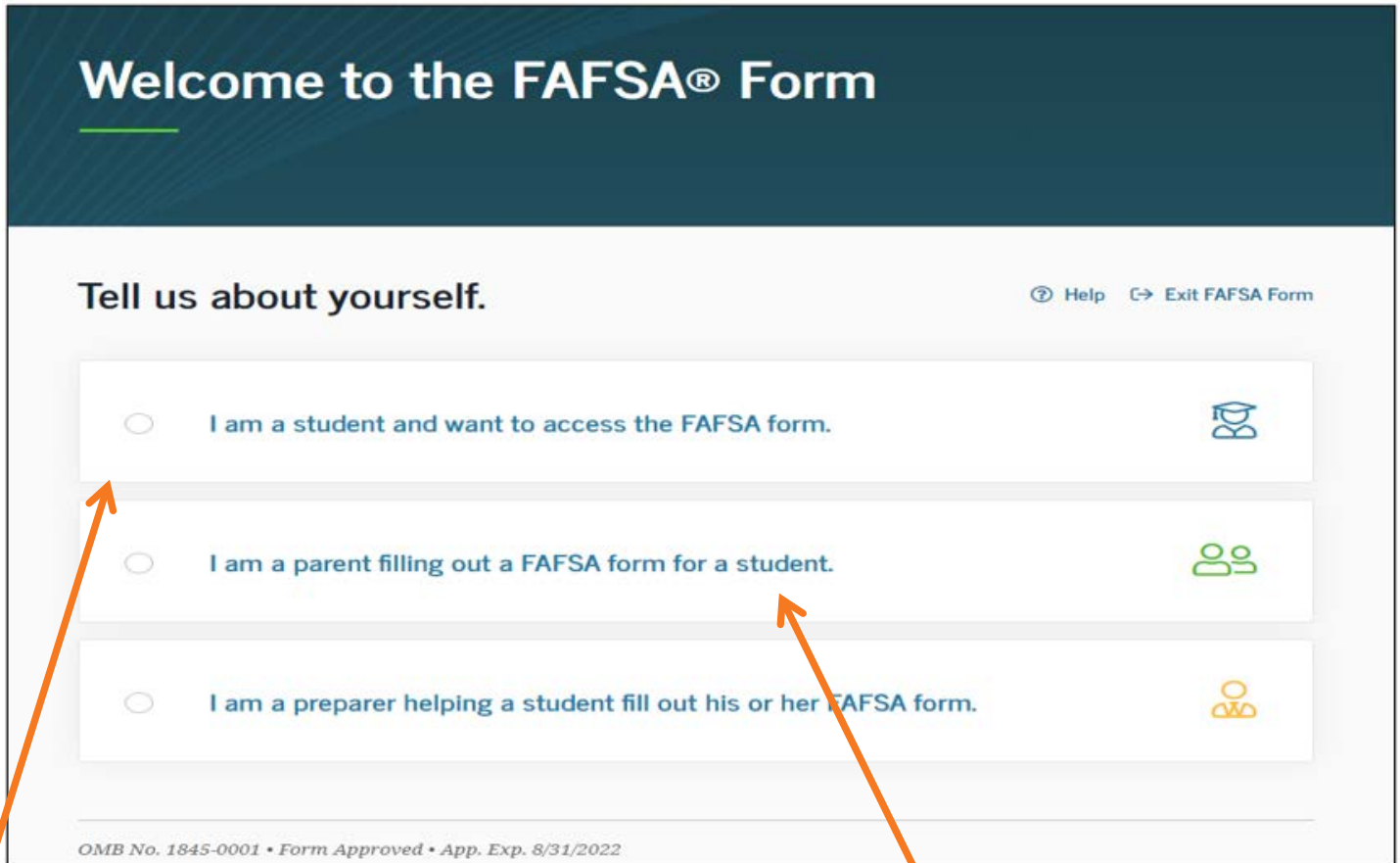
FAFSA: Free Application for Federal Student Aid

<https://studentaid.gov/h/apply-for-aid/fafsa>



Please be aware that Federal Student Aid has moved all their websites into one platform: www.studentaid.ed.gov.




Objective 4: Recognize FAFSA Nuances & Common Pitfalls; Understand How to Address Unique Family and Financial Circumstances



The screenshot shows the 'Welcome to the FAFSA® Form' page. The header is dark blue with the title in white. Below the header, the text 'Tell us about yourself.' is followed by links for 'Help' and 'Exit FAFSA Form'. There are three radio button options, each with an icon to its right. An orange arrow points from the first option to the text below. Another orange arrow points from the second option to the text below.

Welcome to the FAFSA® Form

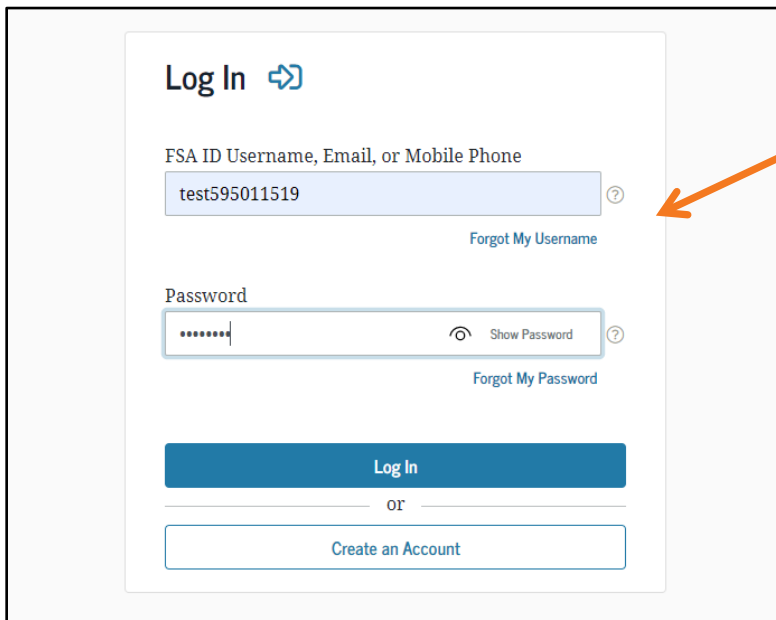
Tell us about yourself. [Help](#) [Exit FAFSA Form](#)

- ☐ I am a student and want to access the FAFSA form. 
- ☐ I am a parent filling out a FAFSA form for a student. 
- ☐ I am a preparer helping a student fill out his or her FAFSA form. 

OMB No. 1845-0001 • Form Approved • App. Exp. 8/31/2022

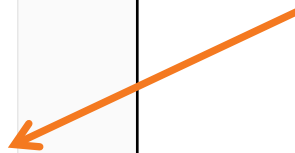
Students will log-in here, using their FSA ID.

The parent(s) of a student may log-in here to access the student's FAFSA.

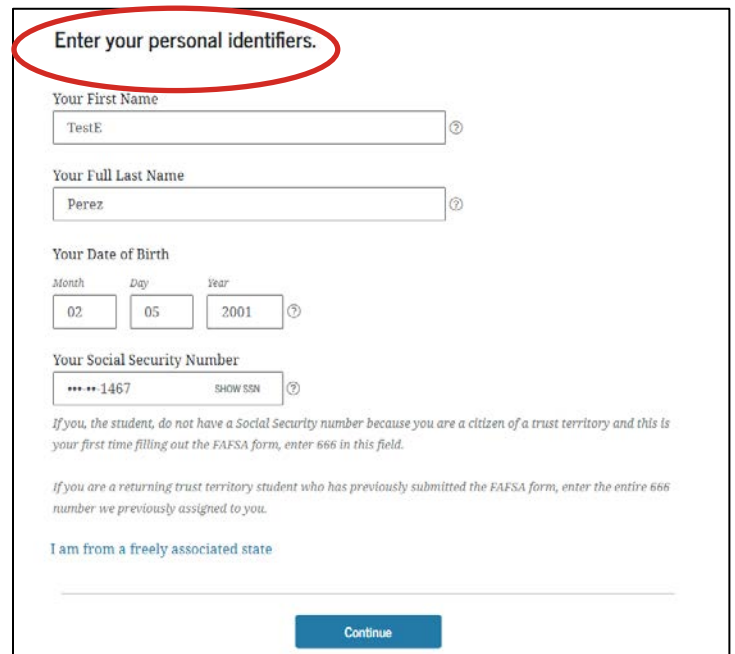


The image shows the FAFSA Log In screen. At the top, it says "Log In" with a right-pointing arrow icon. Below this is a text input field labeled "FSA ID Username, Email, or Mobile Phone" containing the text "test595011519". To the right of this field is a question mark icon. Below the field is a link that says "Forgot My Username". Below that is a password input field labeled "Password" with masked characters "*****". To the right of the password field is an eye icon and a link that says "Show Password", followed by a question mark icon. Below the password field is a link that says "Forgot My Password". At the bottom of the login section is a blue button labeled "Log In". Below this button is the word "OR" flanked by horizontal lines. At the very bottom is a button labeled "Create an Account".

Students may log in using their FSA ID.
Students are encouraged create their FSA ID prior to starting the FAFSA.



Parents may log in using the student's personal identifiers to access questions related to parent demographics and financial information. Parents will need the student's SAVE KEY (see page 9).



The image shows the "Enter your personal identifiers." form. The title "Enter your personal identifiers." is circled in red. Below the title are several input fields: "Your First Name" with the text "TestE", "Your Full Last Name" with the text "Perez", "Your Date of Birth" with three sub-fields for "Month" (02), "Day" (05), and "Year" (2001), and "Your Social Security Number" with the text "*** ** 1467" and a "SHOW SSN" link. Below these fields are two paragraphs of text: "If you, the student, do not have a Social Security number because you are a citizen of a trust territory and this is your first time filling out the FAFSA form, enter 666 in this field." and "If you are a returning trust territory student who has previously submitted the FAFSA form, enter the entire 666 number we previously assigned to you." Below the text is a link that says "I am from a freely associated state". At the bottom right is a blue button labeled "Continue".

Get Started

Help | Exit FAFSA Form

Welcome to TestE's application!

Fill out your FAFSA form!

To receive federal student financial aid, you need to fill out a FAFSA form every school year. Let's get started.

For which school year are you applying for financial aid?

If you are applying for a summer session or just don't know which application to complete, check with the college you are planning to attend.

Which school year should I choose?

Start 2023–24 FAFSA Form

 or

Start 2022–23 FAFSA Form

Please complete the **2023-2024 FAFSA**, which is available starting October 1st, 2022.

Start Student's 2023–24 FAFSA® Form

Create a save key.
The save key is for temporary use for you or your parent to return and complete this specific FAFSA form.

Create a Save Key

Show

?

Reenter Save Key

Show

?

Previous

Continue

Students will need to create a SAVE KEY to return to a saved FAFSA! A SAVE KEY is temporary and between 4–8 characters long.



Pay close attention to the navigation bar at the top of each page; it will clearly indicate if you are answering questions about the student or about the parent(s).

STUDENT INFORMATION

Personal Information for Student

i Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

Your Social Security Number
***-**-1519

Your First Name
TestE ⓘ

Your Middle Initial
ⓘ

Your Last Name
Perez ⓘ

Your Date of Birth
Month: 02 Day: 05 Year: 2001 ⓘ

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

Some of the information on the **Student Demographics** pages may be pre-populated with information used to create the student's FSA ID. This is one reason students are strongly advised to log-in with the FSA ID instead of personal identifiers.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

4
Parent Demographics

5
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Email and Phone

Your Email Address

test595011519@test.com?

Reenter Your Email Address

test595011519@test.com?

Your Telephone Number

?

PreviousContinue

✓
Student Demographics

✓
School Selection

✓
Dependency Status

4
Parent Demographics

5
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Address

Your Permanent Mailing Address (include apt. number)

100 Main St?

Your City (and country, if not U.S.)

Manchester?

Your State

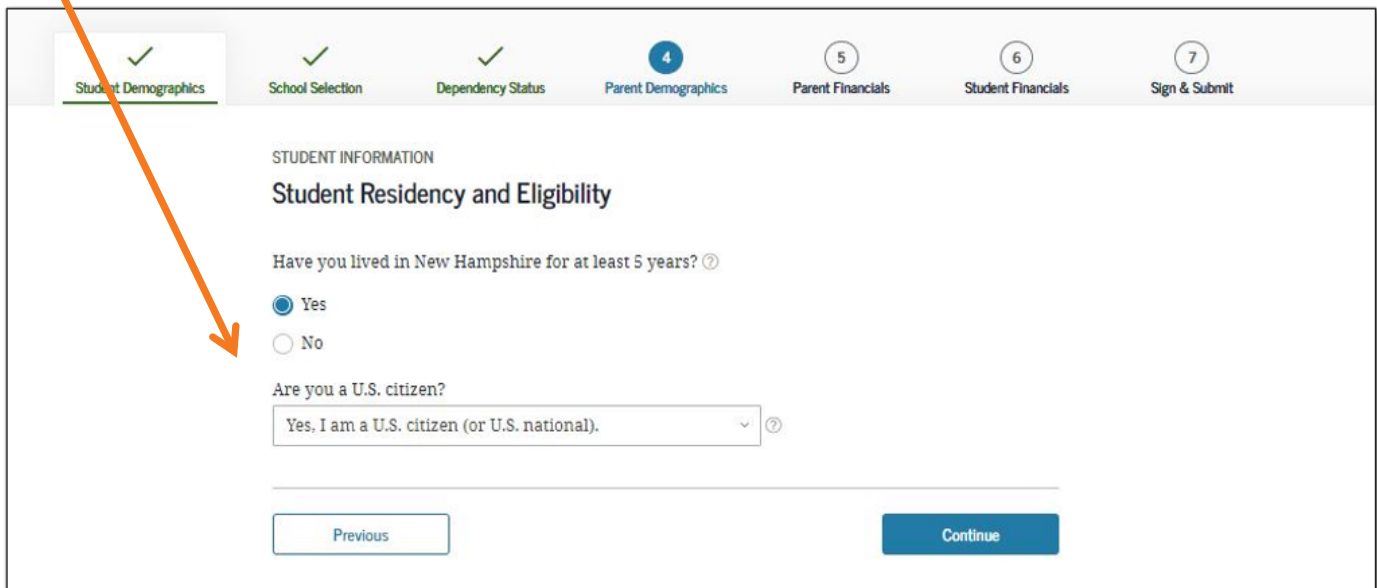
New Hampshire?

Your ZIP Code

03245?

PreviousContinue

Students are asked to identify if they are a citizen or eligible noncitizen. ***Students who may be ineligible to file a FAFSA are encouraged to contact The Scholarship Foundation to be connected to a member of our team who can assist.***



The screenshot displays the FAFSA application interface. At the top, a progress bar shows seven steps: Student Demographics (completed), School Selection (completed), Dependency Status (completed), Parent Demographics (current step, marked with a blue circle and number 4), Parent Financials (5), Student Financials (6), and Sign & Submit (7). The main content area is titled 'STUDENT INFORMATION' and 'Student Residency and Eligibility'. It contains two questions: 'Have you lived in New Hampshire for at least 5 years?' with radio buttons for 'Yes' (selected) and 'No', and 'Are you a U.S. citizen?' with a dropdown menu showing 'Yes, I am a U.S. citizen (or U.S. national)'. At the bottom, there are 'Previous' and 'Continue' buttons. An orange arrow points from the top left to the 'Yes' radio button.

STUDENT INFORMATION

Student Residency and Eligibility

Have you lived in New Hampshire for at least 5 years? [?]

☒ Yes

☐ No

Are you a U.S. citizen?

Yes, I am a U.S. citizen (or U.S. national). [?]

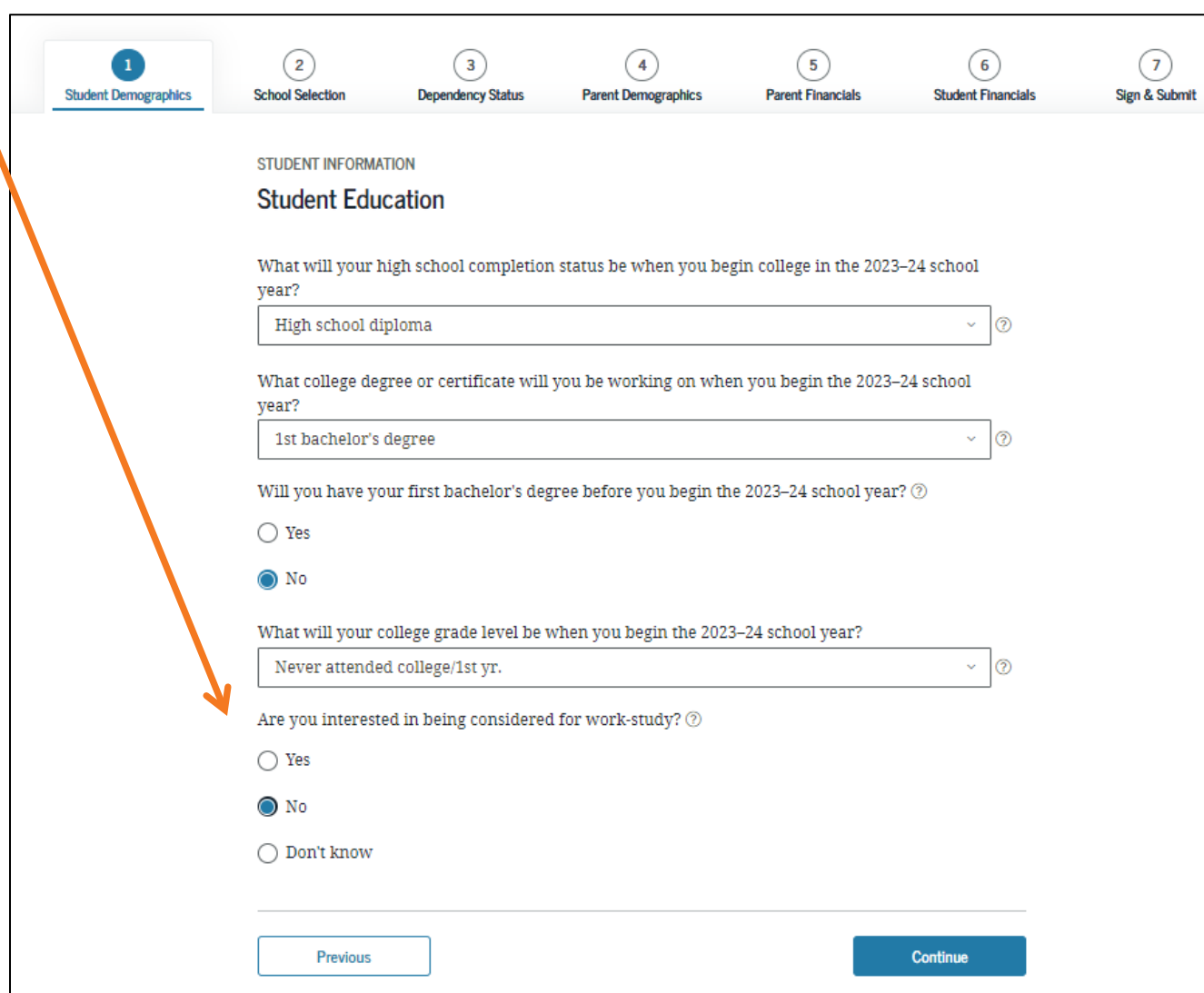
[Previous](#) [Continue](#)

Students who are high school seniors will likely indicate **high school diploma** for high school completion status. Additionally, even if they have dual enrollment or taken other college credits, most of these students will also indicate **never attended college/1st year** for their grade level in 2023–24.

Even if a student plans to pursue a graduate or professional degree, they should indicate their first degree, which will be a **certificate; one of the associate degree options**; or **1st bachelor's degree**.

Students who file a FAFSA are automatically considered for grants and student loans; students must opt-in to consideration for Federal Work Study.

Students are encouraged to respond “yes”; work study may be turned down later if not needed or desired.



The screenshot shows the FAFSA application interface. At the top, there is a progress bar with seven steps: 1. Student Demographics, 2. School Selection, 3. Dependency Status, 4. Parent Demographics, 5. Parent Financials, 6. Student Financials, and 7. Sign & Submit. The first step, 'Student Demographics', is highlighted with a blue circle and the number 1.

Below the progress bar, the section is titled 'STUDENT INFORMATION' and 'Student Education'. The first question is 'What will your high school completion status be when you begin college in the 2023–24 school year?'. The dropdown menu is set to 'High school diploma'.

The second question is 'What college degree or certificate will you be working on when you begin the 2023–24 school year?'. The dropdown menu is set to '1st bachelor's degree'.

The third question is 'Will you have your first bachelor's degree before you begin the 2023–24 school year?'. The radio buttons are set to 'No'.

The fourth question is 'What will your college grade level be when you begin the 2023–24 school year?'. The dropdown menu is set to 'Never attended college/1st yr.'.

The fifth question is 'Are you interested in being considered for work-study?'. The radio buttons are set to 'No'.

At the bottom, there are two buttons: 'Previous' and 'Continue'.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

4
Parent Demographics

5
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Driver's License

Your Driver's License Number (if you have one)

Your Driver's License State

Select

PreviousContinue

1
Student Demographics

2
School Selection

3
Dependency Status

4
Parent Demographics

5
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Foster Care and Parent Education Completion

Are you a foster youth or were you in the foster care system at any time?

?

Yes

No

What's the highest school completed by Parent 1?

High school

What's the highest school completed by Parent 2?

College or beyond

PreviousContinue

✓ Student Demographics 2 School Selection 3 Dependency Status 4 Parent Demographics 5 Parent Financials 6 Student Financials 7 Sign & Submit

STUDENT INFORMATION

Add Your High School

✓ Application was successfully saved.

i Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

i To find your high school, enter the following criteria and select "Search."

State / Province / Territory
Select My country is not listed

City - optional

High School Name - optional

Search

Previous

Students must enter the name of their high school and are asked to **SEARCH** to locate the exact school for confirmation.

✓ Student Demographics ✓ School Selection 3 Dependency Status 4 Parent Demographics 5 Parent Financials 6 Student Financials 7 Sign & Submit

STUDENT INFORMATION

Confirm Your High School

✓ Review the information below and then select "Continue" to add this school to your application.

i Verify that the high school information you entered is correct, then select "Continue."

High School Information

HIGH SCHOOL NAME
Anacostia Hs

CITY
Washington

STATE
District of Columbia

Previous Start New Search Continue

Students must list the college(s) where they hope to be considered for financial aid. Most students will NOT know the Federal School Code and will instead search by a combination of state, city, and/or school name. Schools are not required to be in any order; each college will only see their institution listed on the report they receive from Federal Student Aid, meaning they do not know what other colleges are listed.

The screenshot shows the 'SCHOOL SELECTION' section of the FAFSA application, specifically the 'College Search' step. The top navigation bar includes steps 1 through 7: Student Demographics, School Selection (active), Dependency Status, Parent Demographics, Parent Financials, Student Financials, and Sign & Submit. The page contains three informational boxes: 1. 'TestE, based on the information you provided, we've determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.' 2. 'Here's where you'll search for the colleges to which you'd like to send your FAFSA® information. You can add up to 10 colleges at a time to your FAFSA form. Learn what to do if you're applying to more than 10 colleges. Make sure you add ALL colleges you're interested in, even if you haven't applied or been accepted yet.' 3. 'Complete the fields below to search for a college to add to your FAFSA® form. Need help refining your search? Try these search tips.' Below these boxes is a search form with two tabs: 'Search by School Name, City, State' (selected) and 'Search by Federal School Code'. The form includes a 'State' dropdown menu, a 'City - optional' text field, and a 'School Name - optional' text field. A 'Search' button is at the bottom right of the form. A 'Previous' button is located at the bottom left of the page.

The screenshot shows the 'SCHOOL SELECTION' section of the FAFSA application, specifically the 'Selected Colleges and Housing Info' step. The top navigation bar is the same as the previous screenshot. The page contains an informational box: 'For each school listed, select the appropriate housing plan from the drop-down list.' Below this is a table with one row for 'Howard University'. The table columns are: a collapse/expand icon, the school name 'Howard University', the Federal School Code '0014448', the location 'Washington, DC', a 'View College Info' link, and a 'Remove' button. The 'Housing Plan' column shows a dropdown menu with 'On Campus' selected. Below the table is a button '+ Add More Schools'. At the bottom of the page, a button 'Compare All Schools' is circled in red. 'Previous' and 'Continue' buttons are at the bottom left and right respectively.


Once a student has chosen their schools, they must indicate housing plans. Options include:


- With Parent
- On Campus
- Off Campus


The primary purpose of this is to help the school establish the student's budget for cost of attendance. For example, on campus housing would have a higher budget than living at home with a parent.

By selecting to Compare All Schools, students can review several key statistics related to the college(s) listed on their FAFSA. This includes information pulled from the College Scorecard (collegescorecard.gov) on net price, graduation rates, retention rates, and transfer rates. Although these data may not be the pieces that make (or break) an enrollment decision, they should be considered in the decision-making process. For example, more than four years to

graduate from a bachelor's degree program means more cost in tuition and fees, higher debt burden, and an opportunity cost, due to lost wages from less time in the job market.

 School Name: ST LOUIS COMMUNITY COLLEGE School Type: 2-year, Public	
Federal School Code:	002469
Address:	300 SOUTH BROADWAY
City:	ST LOUIS
Web site:	Click Here
In-State	\$3,285
Out-of-State	\$6,435
Net Price Average:	\$7,565
Graduation Rate:	13%
Retention Rate:	61%
Transfer Rate:	23%
Additional Information from College Scorecard:	NA

> UNIVERSITY OF MISSOURI - COLUMBIA	
 School Name: UNIVERSITY OF MISSOURI - COLUMBIA School Type: 4-year, Public	
Federal School Code:	002516
Address:	11 JESSE HALL
City:	COLUMBIA
Web site:	missouri.edu/
In-State	\$9,787
Out-of-State	\$26,506
Net Price Average:	\$18,602
Graduation Rate:	68%
Retention Rate:	86%
Transfer Rate:	0%
Additional Information from College Scorecard:	NA

> KENTUCKY STATE UNIVERSITY	
 School Name: KENTUCKY STATE UNIVERSITY School Type: 4-year, Public	
Federal School Code:	001968
Address:	MAIN STREET C/O FIN AID OFC
City:	FRANKFORT
Web site:	www.kysu.edu
In-State	\$8,184
Out-of-State	\$19,638
Net Price Average:	\$8,772
Graduation Rate:	20%
Retention Rate:	63%
Transfer Rate:	41%
Additional Information from College Scorecard:	NA

Student Demographics School Selection **3** Dependency Status 4 Parent Demographics 5 Parent Financials 6 Student Financials 7 Sign & Submit

SCHOOL SELECTION
Student Marital Status

Application was successfully saved.

Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

What is your marital status as of today?

Single

Previous Continue

To verify dependency status, students are first asked to confirm their age, marital status, and degree program.

Students who are under 24 years of age, unmarried, and working on a certificate, associate, or bachelor's degree are **dependent**.

Student Demographics School Selection **3** Dependency Status 4 Parent Demographics 5 Parent Financials 6 Student Financials 7 Sign & Submit

STUDENT INFORMATION
Does the student have dependents?

Dependent Children

Do you now have or will you have children who will receive more than half of their support from you between July 1, 2023, and June 30, 2024?

☐ Yes
☒ No

Other Dependents

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2024?

☐ Yes
☒ No

Previous Continue

Students are next asked to address any dependents they may have, including children of their own.

Having dependents *may* make a student **independent**, which means they would not be required to provide parent(s) information on the FAFSA.

✓
Student Demographics

✓
School Selection

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Dependency Status

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Parent Demographics

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Parent Financials

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Student Financials

7
Sign & Submit

SCHOOL SELECTION

Student Additional Dependency Questions

Answer the following questions to determine if you are required to provide information about your parents on your FAFSA® form. Select all that apply or "None of the above." ?

☐ Are you currently serving on active duty in the U.S. armed forces for purposes other than training?

☐ Are you a veteran of the U.S. armed forces?

☐ At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?

☐ As determined by a court in your state of legal residence, are you or were you an emancipated minor?

☐ Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?

☒ None of the above

PreviousContinue

✓
Student Demographics

✓
School Selection

3
Dependency Status

4
Parent Demographics

5
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Homelessness Filter Question

On or after July 1, 2022, were you homeless or were you self-supporting and at risk of being homeless? ?

☐ Yes

☒ No

PreviousContinue

Student Demographics School Selection **3** Dependency Status 4 Parent Demographics 5 Parent Financials 6 Student Financials 7 Sign & Submit

SCHOOL SELECTION

Dependent Student Status

Based on your answers to the dependency status questions, you are considered a **"dependent"** student. This means you must provide parental information. Select the "I will provide information about my parent(s)" option and select "Continue" to continue to "Parent Demographics" section.

If you have a special circumstance and are unable to provide parental information, under very limited circumstances, you may be able to submit your FAFSA[®] form without parental information. Select the "I am unable to provide information about my parent(s)" option and select "Continue" to get additional information. ?

☒ I will provide information about my parent(s).

☐ I am unable to provide information about my parent(s).

Previous Continue

Students who file a FAFSA are considered ***dependent*** or ***independent***. Dependent students are required to provide parent information; independent students are not required to do so. Dependency must meet ***one of the following criteria*** to be independent: ***students are independent*** if they are at least 24 years old; working on a master's or doctorate degree; married; providing more than 50% of the financial support for a child or another dependent; a veteran or serving on active duty in the military; emancipated by a court; in court-ordered legal guardianship; a ward of the court or in foster care; or considered homeless or self-supporting or at risk of being homeless. **Students not meeting any of these criteria are dependent.**

NOTE: There are some students who meet the definition of a dependent student, but who are unable to provide parent information. The student may be eligible to pursue a ***dependency override***, which will be addressed on the next page. Students who have questions about the dependency override process or need support can contact a Student Advisor at The Scholarship Foundation who can help: <https://linktr.ee/SFSTLadvising>.

✓

Student Demographics

✓

School Selection

3

Dependency Status

4

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

SCHOOL SELECTION

Impact of Not Providing Parent Information

If you continue to complete the application without providing parent information, the following will occur:

- We will **not** transfer any parent information from your last year's application into this year's FAFSA® form.
- We will **not** calculate your Expected Family Contribution (EFC), which colleges use to determine your financial aid package.
- You may be limited in the types of federal student aid that you are eligible to receive.
- You must follow up with the financial aid administrator at the college you plan to attend in order to find out how much student aid you are eligible to receive.

Previous

Continue

✓

Student Demographics

✓

School Selection

3

Dependency Status

4

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

STUDENT INFORMATION

Special Circumstances Qualifications

You may still be eligible for some type of federal student aid without providing parent information. **Please read through the following options carefully.**

Special Circumstances Option

You must contact the financial aid administrator at the college you plan to attend if you believe you have a special circumstance that should be considered in determining your eligibility for federal student aid. However, not all situations are considered a special circumstance. For example, the following situations would **not** be considered as a special circumstance on his or her own:

- You do not live with your parent(s).
- Your parent(s) does not provide you with financial support.
- Your parent(s) refuses to contribute to your college expenses.
- Your parent(s) does not claim you as a dependent on his or her income tax return.
- Your parent(s) does not want to provide his or her information on your FAFSA® form.

Unsubsidized Loan Option

If you do not meet a requirement for a special circumstance and still choose to continue your application without providing parent information, you will only be considered for an unsubsidized

You must contact the financial aid administrator at the college you plan to attend if you believe you have a special circumstance that should be considered in determining your eligibility for federal student aid. However, not all situations are considered a special circumstance. For example, the following situations would **not** be considered as a special circumstance on his or her own:

- You do not live with your parent(s).
- Your parent(s) does not provide you with financial support.
- Your parent(s) refuses to contribute to your college expenses.
- Your parent(s) does not claim you as a dependent on his or her income tax return.
- Your parent(s) does not want to provide his or her information on your FAFSA® form.

Unsubsidized Loan Option

If you do not meet a requirement for a special circumstance and still choose to continue your application without providing parent information, you will only be considered for an unsubsidized loan. To request consideration for an unsubsidized loan, you must contact the financial aid administrator at the college you plan to attend.

Choose the appropriate option below based on your circumstances. ?

- ☐ I will provide information about my parent(s).
- ☐ I have a special circumstance and I am unable to provide information about my parent(s).
- ☒ I do not have a special circumstance, and I am submitting my FAFSA® form without parent information to apply for an unsubsidized loan only.

Previous

Continue

Students who believe they have a special circumstance as outlined in the above form are encouraged to submit their FAFSA without parent information and immediately follow-up with their prospective college(s) for instructions on what paperwork and supporting documentation are required to complete a dependency override (sometimes referred to as a DO). Students unsure if they may be eligible or needing/wanting support should contact The Scholarship Foundation for support and assistance.

Students who are dependent must provide information for a biological or adoptive parent. The parent(s) reported on the FAFSA is determined not only by marital status, but also by physical custody. The student should report the personal and financial information for the parent with whom they lived more than 50% of the time in the past year.

If the student lives with a biological parent who is remarried, the stepparent's information is required.

If the student splits time equally between two biological parents, the student would report the information of the parent who provides more than 50% of the financial support.

If the student lives with both biological parents together in one household, their marital status does not matter—both parents' information must be provided. One marital status option is ***Unmarried but Living Together***.

The screenshot shows the FAFSA application interface. At the top, a progress bar indicates the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (current step, marked with a blue circle and number 4), Parent Financials (marked with a circle and number 5), Student Financials (marked with a circle and number 6), and Sign & Submit (marked with a circle and number 7).

The main heading is "PARENT INFORMATION" followed by the question "Whose Information Should I Provide?". Below this, a green success message states: "Application was successfully saved." Below that, a blue information box with an 'i' icon says: "For additional assistance determining what parent information to report on the FAFSA® form, refer to *Who's my Parent When Filling Out the FAFSA form?* fact sheet."

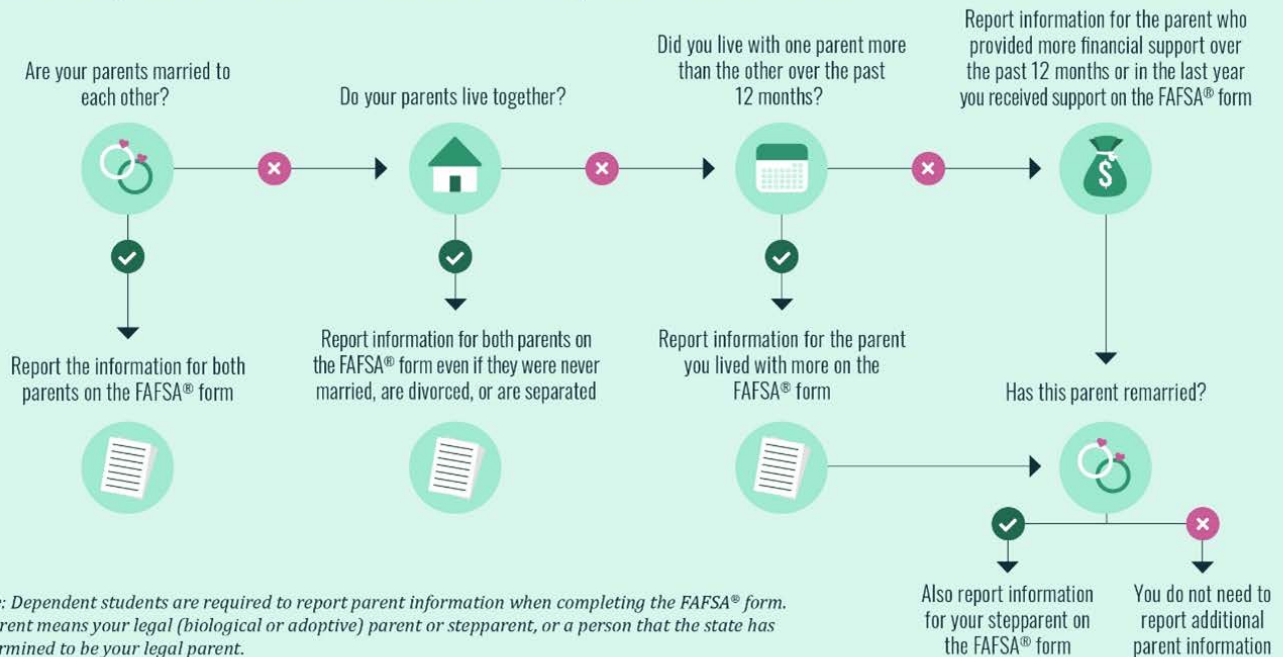
The instructions state: "Since you have been identified as a dependent student, you will need to provide information about your parent(s). You must identify and report information about your parent(s) even if you don't live with him or her. Use the following criteria to determine whose information you should report in the 'Parent Demographics' and 'Parent Financials' sections of the FAFSA® form:"

There are four radio button options:

- ☐ My parents live together (married or unmarried).
- ☐ My parents are divorced or separated, and I live with one parent more than the other.
- ☐ My parents are divorced or separated, and I live with both parents equally.
- ☐ I was legally adopted.

At the bottom, there are two buttons: "Previous" (light blue) and "Continue" (dark blue).

Who's My Parent When I Fill Out My FAFSA® Form?



Note: Dependent students are required to report parent information when completing the FAFSA® form. A parent means your legal (biological or adoptive) parent or stepparent, or a person that the state has determined to be your legal parent.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

4
Parent Demographics

5
Parent Financials

6
Student Financials

7
Sign & Submit

PARENT INFORMATION

Parent Marital Status

i

Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

As of today, what is the marital status of your parents?

Married or remarried

When did your parents get married or remarried?

Month

Year

08

1994

Previous

Continue

Remember, the FAFSA belongs to the student; "you" and "your" refer to the student, so questions should be considered from the student perspective.

✓

Student Demographics

✓

School Selection

✓

Dependency Status

4

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

PARENT INFORMATION

Enter Information for Your First Parent
(father/mother/stepparent)

Your Parent's Social Security Number

***-**-7890

SHOW SSN

?

Your Parent's Last Name

Walter

?

Your Parent's First Initial

W

?

Your Parent's Date of Birth

Month

Day

Year

12

11

1970

?

Your Parents' Email Address

willywalter56@yahoo.com

?

Reenter Your Parents' Email Address

willywalter56@yahoo.com

?

Previous

Continue

Personal information for parent(s) includes SSN, last name, first initial, and birthdate. In two-parent households, each parent's information will be entered on a separate page to avoid confusion. Remember, parents include biological and/or adoptive parents, as well as stepparents in the case of remarriage.

No one else is considered a parent on the FAFSA, including a legal guardian!

✓

Student Demographics

✓

School Selection

✓

Dependency Status

4

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

PARENT INFORMATION

Enter Information for Your Other Parent
(father/mother/stepparent)

Your Parent's Social Security Number

***-**-8463

SHOW SSN

?

Your Parent's Last Name

Brown

?

Your Parent's First Initial

V

?

Your Parent's Date of Birth

Month

Day

Year

11

30

1980

?

Previous

Continue



Student Demographics



School Selection



Dependency Status

4

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

PARENT INFORMATION

Parent State of Legal Residence

Have your parents lived in District of Columbia for at least 5 years? [?](#)

☒ Yes

☐ No

Previous

Continue

Household size can be tricky to report on the FAFSA. Students should include themselves; their parent(s); any siblings who receive half of their support from the parent(s) and/or can answer “no” to every dependency question on the FAFSA; and anyone else (e.g., grandparent) who lives with their parent(s) and receives more than half of their support from the student’s parent(s).

Parents who are enrolled in college may not include themselves in the total of number of people in the household who are in college. If parents are enrolled, they should speak with the financial aid office at the student’s college.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

4
Parent Demographics

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Parent Financials

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Student Financials

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Sign & Submit

PARENT INFORMATION

Enter Information for Your Parents' Dependents

i

Do not include yourself (the student).

How many other dependent children do your parents have?

Include the other dependent children of your parents if they

- will rely on your parents for more than half of their financial support between July 1, 2023 and June 30, 2024;
- or
- can answer "no" to every dependency status question on the FAFSA® form.

1

?

How many other dependents do your parents have?

Include your parents' other dependents if they

- now live with your parents,
- currently receive more than half of their support from your parents,
- and
- will continue to receive more than half of their financial support from your parents between July 1, 2023 and June 30, 2024.

1


?

Previous

Continue

PARENT INFORMATION

Parent Household Information



Your household size is **5**.

You:	Your Parents:	Other Dependent Children of Your Parent(s):	Other Dependents of Your Parent(s):
1	2	1	1

Number in College

Out of the 3 dependents in your parents' household (as shown above), how many will be college students between July 1, 2023 and June 30, 2024? **DO NOT include your parents, but DO include yourself** and other members of the household.

1

?

✓

Student Demographics

✓

School Selection

✓

Dependency Status

✓

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

PARENT INFORMATION

Parent Tax Filing Status

For 2021, have your parents completed their IRS income tax return or another tax return?


Already completed

What type of income tax return did your parents file for 2021?

IRS Form 1040

For 2021, what is your parents' tax filing status according to their tax return?

Married—filed joint return



RECOMMENDED

IRS Data Retrieval Tool

Applying is faster and easier if your parents transfer their tax return information into this FAFSA® form with the IRS Data Retrieval Tool (DRT)!

For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

Previous

Skip IRS DRT and Complete Manually

Proceed to the IRS >

The student's parent(s) will be asked if they filed **federal** taxes for **2021**. Not all families are required to file; “*Not going to file*” is a selection option. Please be aware that tax complications and errors can delay financial aid and, in some cases, prevent the student from accessing aid altogether. If there are any questions or concerns about a tax circumstance and how it might impact financial aid eligibility, please contact The Scholarship Foundation or the financial aid office at the student's college of choice.

✓

Student Demographics

✓

School Selection

✓

Dependency Status

✓

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

PARENT INFORMATION

Parent Eligible for IRS DRT

Applying is faster and easier with the IRS Data Retrieval Tool (DRT)!

Based on your responses, we recommend that you, the parents, transfer your information from the IRS into this FAFSA form. The IRS DRT allows you to link to the IRS website and securely transfer original IRS tax return information into the FAFSA form.

If you use the IRS DRT, you may not have to provide additional IRS documentation later for the student to qualify for federal student aid.

No Thanks

Proceed to the IRS

IRS Data Retrieval Tool (DRT)

What is the IRS DRT?

An online function that allows for student and parent tax filers, who filed a **federal tax return**, to electronically transfer processed tax information from the IRS into a FAFSA.

Is it required?

No, it is not required. ***However, it is strongly encouraged.***

What are the benefits of the IRS DRT?

There are several benefits. First, it eliminates the need to manually enter tax information, which can be inaccessible and, if available, difficult to enter. Second, it significantly reduces the likelihood of needing to undergo the process of verification related to income. Verification can extend the financial aid process, delaying financial aid award letters and a student's ability to make an informed enrollment decision.

What happens if I cannot transfer my data?

You may still submit a FAFSA, but you may be asked to verify income with the financial aid office at the school(s) to which you applied to for admission. This may mean providing copies of an IRS Tax Transcript, a summary of a processed tax return.

Will I be able to see my tax information after it transfers?

No. Transferred tax information is encrypted and ***will not be viewable*** on the FAFSA itself or the Student Aid Report. This change is an effort to increase security and privacy. Because transferred data is not viewable, edits are not allowed.

Are there any tax-filers who cannot transfer tax information from the IRS?

Married tax filers, who filed separate returns, cannot use the IRS DRT. Information will need to be input manually. In addition, legal parents who are not married, but reside in the same household, will also need to manually enter tax information.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

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Parent Financials

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Student Financials

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Sign & Submit

PARENT INFORMATION

Parent Log In to IRS Data Retrieval Tool

i

To use the IRS Data Retrieval Tool (DRT), have the parent listed in the FAFSA® form enter his or her credentials below. Otherwise, skip the IRS DRT. If you have any questions or problems using this tool, [view more information about the IRS DRT.](#)

Provide parent FSA ID credentials.

Which parent are you? ⓘ

☒ B. Smith (Parent 1)

☐ C. Smith (Parent 2)

FSA ID Username, Email Address, or Mobile Number ⓘ

[Forgot Username](#) | [Create an FSA ID](#)

FSA ID Password ⓘ

Show

[Forgot Password](#)

Skip IRS DRT and Complete Manually

Continue

The parent(s) of a dependent student will have the opportunity to electronically transfer processed tax information from the IRS into the FAFSA. The parent will use their FSA ID to transfer access the IRS Data Retrieval Tool.



Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2021 Federal Income Tax Return. [?](#)

All fields are required unless marked otherwise.

First Name

DEPENDENT

Last Name

DATA43

Social Security Number

No input required

*** - ** - 2542

Date of Birth

MM/DD/YYYY

01/01/1999



Filing Status [?](#)

Married-Filed Joint Return



Street Address [?](#)

Must match your 2021 Federal Income Tax Return

P.O. Box [?](#)

Required if entered on your tax return

Apartment Number

Required if entered on your tax return

Country

United States



City, Town or Post Office

State / U.S. Territory

Select One



ZIP Code

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

SUBMIT

Select the button below to exit the IRS system and return to your FAFSA.

CANCEL



2021 Federal Income Tax Information

Dependent Data43

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

Tax Year	Type of Return Filed	Untaxed Portion of IRA Distributions & Pensions/Annuities
Name(s)	Adjusted Gross Income	Tax-exempt Interest Income
Social Security Number	Income Earned from Work	IRA Deductions and Payments
Filing Status	Income Tax	Status of Amended Returns Received
IRS Exemptions	Education Credits	Schedule 1 Evaluation

Refer to your tax records if you have a question about the values you reported.

Transfer My Tax Information into the FAFSA Form ?

The tax information provided to fafsa.gov will populate the answers to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.



TRANSFER NOW



Do Not Transfer My Tax Information and Return to the FAFSA Form ?

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.



DO NOT TRANSFER



Parents who use the IRS Data Retrieval will see much of the detail on the next several screen shots transferred from the IRS into the FAFSA. Data is encrypted and will state **Transferred from the IRS**. All pertinent line items will be transferred, even if the transferred amount is \$0.

✓

Student Demographics

✓

School Selection

✓

Dependency Status

✓

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign & Submit

PARENT INFORMATION

Parent IRS Info

What was your parents' adjusted gross income for 2021?

This amount is found on IRS Form 1040—line 11.

\$

25,000

.00

?

[Calculate with Income Estimator](#)

Previous

Continue

✓

Student Demographics

✓

School Selection

✓

Dependency Status

✓

Parent Demographics

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Parent Financials

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Student Financials

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Sign & Submit

PARENT INFORMATION

Parent Income from Work

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2021?

This amount is your Parent 1 (father's/mother's/stepparent's) portion of IRS Form 1040—line 1 + Schedule 1, lines 3 + 6 + Box 14 (Code A) of Schedule K-1 (Form 1065).

\$

5,500

.00

?

How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2021?

This amount is your Parent 2 (father's/mother's/stepparent's) portion of IRS Form 1040—line 1 + Schedule 1, lines 3 + 6 + Box 14 (Code A) of Schedule K-1 (Form 1065).

\$

31,000

.00

?

Previous

Continue

In two-parent households, income earned from working will not transfer. As a result, it is advised that families have W2s, 1099s, and other wage/income statements readily available when filing a FAFSA.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

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Parent Financials

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Student Financials

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Sign & Submit

PARENT INFORMATION

Parent Simplified Path Determination

You indicated that your parents filed an IRS Form 1040. Did your parents file a Schedule 1? Select **No** if your parents did not file a Schedule 1 or **only filed** a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend. [Learn more about Schedule 1.](#) ⓘ

☐ Yes

☒ No

☐ Don't know

Previous

Continue

Not all families will see the **Simplified Path Determination**. The FAFSA uses skip logic, and this option will be available when families meet the criteria to use the simplified path, which allows them to skip remaining questions about income and assets.

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

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Parent Financials

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Sign & Submit

PARENT INFORMATION

Parent Skip Remaining Questions?

Do you want to skip the remaining questions about your and your parents' income and assets? ?

☐ Yes

☒ No

Previous

Continue

✓
Student Demographics

✓
School Selection

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Dependency Status

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Parent Demographics

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Parent Financials

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Student Financials

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Sign & Submit

PARENT INFORMATION

Parent Additional IRS Info

Enter the amount of your parents' income tax for 2021.

This is the total amount of IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero here.

\$4,500.00 ?

Previous

Continue

✓

Student Demographics

✓

School Selection

✓

Dependency Status

✓

Parent Demographics

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Parent Financials

6

Student Financials

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Sign & Submit

PARENT INFORMATION

Parent Questions for Tax Filers Only

Did your parents have any of the following items in 2021? Enter amounts for all that apply.

Combat pay or special combat pay. **This should be zero for enlisted persons and warrant officers** (including commissioned warrant officers) because combat pay is entirely nontaxable. Only enter taxable combat pay included in your parents' adjusted gross income.

\$

0

.00

?

Student college grant and scholarship aid reported to the IRS in your parents' income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

\$

0

.00

?

Education credits (*American Opportunity Tax Credit* or *Lifetime Learning Tax Credit*) from 1040 Schedule 3—line 3.

\$

0

.00

?

Untaxed portions of IRA distributions and pensions from IRS Form 1040— (lines 4a + 5a) minus (lines 4b + 5b). **Exclude rollovers.** If negative, enter a zero here.

\$

0

.00

?

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS form 1040 Schedule 1—total of lines 16+20.

\$

0

.00

?

Tax exempt interest income from IRS Form 1040—line 2a.

\$

0

.00

?

Previous

Continue

✓

Student Demographics

✓

School Selection

✓

Dependency Status

✓

Parent Demographics

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Parent Financials

6

Student Financials

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Sign & Submit

PARENT INFORMATION

Parent Additional Financial Info

Did your parents have any of the following items in 2021? Enter amounts for all that apply.

Child support your parents paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your parents' household.

\$

0

.00

?

Earnings from work under a Cooperative Education Program offered by a college.

\$

0

.00

?

Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

\$

0

.00

?

Previous

Continue

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ **5 Parent Financials** 6 Student Financials 7 Sign & Submit

PARENT INFORMATION

Parent Untaxed Income

Did your parents have any of the following items in 2021? Enter amounts for all that apply.

Child support received for all children. Do not include foster care or adoption payments.

\$.00 ?

Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.

\$.00 ?

Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S. **Don't include** amounts reported in code DD (employer contributions toward employee health benefits).

\$.00 ?

Veterans noneducation benefits such as Disability; Death Pension; or Dependency and Indemnity Compensation (DIC); and/or VA Educational Work-Study allowances.

\$.00 ?

Other untaxed income not reported, such as workers' compensation, disability benefits, etc.

\$.00 ?

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

Many of these items will transfer over from the IRS DRT; one exception is the question about payments to tax-deferred pension and retirement plans. This is a very common question for families to have to answer. Have W2s accessible when filing the FAFSA!

Starting with the 2023-24 FAFSA, **all** parents will be required to report their assets, unless they qualify for the simplified path determination.

(NOTE: retirement accounts, such as 401Ks, 403Bs, etc. are NOT reportable assets on the FAFSA); and the net worth of businesses (if applicable) are assets to be reported. If a family has assets that do not exceed the dollar amount given in the question, assets do not need to be reported at all.

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ **5 Parent Financials** 6 Student Financials 7 Sign & Submit

PARENT INFORMATION

Parent Assets

As of today, what is your parents' total current balance of cash, savings, and checking accounts?

\$.00 ?

As of today, what is the net worth of your parents' investments, including real estate (not your parents' home)?

\$.00 ?

As of today, what is the net worth of your parents' current businesses and/or investment farms? **Don't include** a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

\$.00 ?

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

Once parent(s) financial information has been entered, the FAFSA form will ask similar income and asset questions about the student. **REMINDER:** Pay attention to the navigation bar along the top, which clarifies if questions reference student or parent(s) information.

✓

✓

✓

✓

✓

6

7

Student Demographics

School Selection

Dependency Status

Parent Demographics

Parent Financials

Student Financials

Sign & Submit

STUDENT INFORMATION

Student Tax Filing Status

✓

Application was successfully saved.

⚠

Attention!
You must provide financial information from your **2021 tax return** on the following pages.

i

Because the FAFSA® form belongs to the student, “you” and “your” always (unless otherwise noted) refer to the student.

For 2021, have you completed your IRS income tax return or another tax return?


Already completed

What income tax return did you file for 2021?

IRS Form 1040

For 2021, what is your tax filing status according to your tax return?

Single



RECOMMENDED

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA® form with the IRS Data Retrieval Tool (DRT)!

⚠ For your protection, your tax return information will not display on the IRS website or on the FAFSA® form.

Previous

Skip IRS DRT and Complete Manually

Proceed to the IRS >

✓

✓

✓

✓

✓

6

7

Student Demographics

School Selection

Dependency Status

Parent Demographics

Parent Financials

Student Financials

Sign & Submit

STUDENT INFORMATION

Student IRS Info

What was your adjusted gross income for 2021?

This amount is found on IRS Form 1040—line 11.

\$10,000.00

Calculate with Income Estimator

Previous

Continue

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Income from Work

How much did you earn from working (wages, salaries, tips, etc.) in 2021?
This amount is the total of IRS Form 1040—line 1 + Schedule 1, lines 3 + 6 + Box 14 (Code A) of Schedule K-1 (Form 1065).

\$5,500.00 ⓘ

PreviousContinue

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

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Student Financials

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Sign & Submit

STUDENT INFORMATION

Student Additional IRS Info

Enter the amount of your income tax for 2021.
This is the total amount of IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero here.

\$7,000.00 ⓘ

PreviousContinue

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

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Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Questions for Tax Filers Only

Did you have any of the following items in 2021? Enter amounts for all that apply.

Combat pay or special combat pay. **This should be zero for enlisted persons and warrant officers** (including commissioned warrant officers) because combat pay is entirely nontaxable. Only enter [taxable combat pay](#) included in your (and, if married, your spouse's) adjusted gross income.

\$

0

.00

?

Student college grant and scholarship aid reported to the IRS in your income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

\$

0

.00

?

Education credits (*American Opportunity Tax Credit* or *Lifetime Learning Tax Credit*) from IRS Form 1040 Schedule 3—line 3.

\$

0

.00

?

Untaxed portions of IRA distributions and pensions from IRS Form 1040— (lines 4a + 5a) minus (lines 4b + 5b). **Exclude rollovers.** If negative, enter a zero.

\$

0

.00

?

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16+20.

\$

0

.00

?

Tax exempt interest income from IRS Form 1040—line 2a.

\$

0

.00

?

PreviousContinue

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Additional Financial Info

Did you have any of the following items in 2021? Enter amounts for all that apply.

Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.

\$

0

.00

?

Earnings from work under a Cooperative Education Program offered by a college.

\$

0

.00

?

Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

\$

0

.00

?

PreviousContinue

STUDENT INFORMATION

Student Untaxed Income

Did you have any of the following items in 2021? Enter amounts for all that apply.

Child support received for all children. Do not include foster care or adoption payments.

\$?

Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.

\$?

Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S. **Don't include** amounts reported in code DD (employer contributions toward employee health benefits).

\$?

Veterans noneducation benefits such as Disability; Death Pension; or Dependency and Indemnity Compensation (DIC); and/or VA Educational Work-Study allowances.

\$?

Other untaxed income not reported, such as workers' compensation, disability benefits, etc.

\$?

Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

\$?

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

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

6
Student Financials

7
Sign & Submit

STUDENT INFORMATION

Student Assets

Do you want to skip questions about your assets? ⓘ

☐ Yes

☒ No

As of today, what is your total current balance of cash, savings, and checking accounts?

\$

.00 ⓘ

As of today, what is the net worth of your investments, including real estate (not your home)?

\$

.00 ⓘ

As of today, what is the net worth of your current businesses and/or investment farms? **Don't include** a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

\$

.00 ⓘ

Previous

Continue

Before you sign and submit, please answer a few questions about the student.



These questions don't affect aid eligibility.

Your answers to questions in this survey will not affect your eligibility for federal student aid and will not be used in any aid calculations.

What is your gender?

- ☐ Male
- ☒ Female
- ☐ Nonbinary
- ☐ Decline to answer

Are you transgender?

- ☐ Yes
- ☒ No
- ☐ Decline to answer

What is your ethnicity? Choose all that apply.

- ☐ Not Hispanic nor Latino origin
- ☐ Cuban descent
- ☐ Mexican, Mexican-American, or Chicano descent
- ☒ Puerto Rican descent
- ☐ Other Spanish, Hispanic, or Latino origin
- ☐ Decline to answer

IMPORTANT: The student demographic survey is NEW this year. Survey questions must be answered, although “decline to answer” is an option for every question. *For the 2023-24 FAFSA, Federal Student Aid has indicated these questions will be asked in a pilot, voluntary survey format to collect specific feedback about these new questions.* Feedback will be used to inform the development of questions that will be used for full implementation on the 2024-25 FAFSA.

Your answers to these questions DO NOT affect your financial aid eligibility.

What is your race? *Choose all that apply.*

- ☐ White
- ☐ Black or African American
- ☒ Asian
- ☐ Chinese
- ☐ Filipino
- ☐ Asian Indian
- ☐ Vietnamese
- ☐ Korean
- ☐ Japanese
- ☐ Other Asian origin
- ☐ American Indian or Alaska Native
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ Decline to answer

[Previous](#)

[Continue](#)

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Parent Financials ✓ Student Financials ✓ Sign & Submit 7

SIGN & SUBMIT
Preparer Info

✓ Application was successfully saved.

Are you a paid preparer? (This is rare.) ⓘ

☐ Yes

☒ No

Previous Continue

A preparer is someone PAID to file a FAFSA. There is LOTS of FREE help available. **Please do NOT use a preparer!**

If you see this on the 2023-24 FAFSA, please confirm how you've logged in.

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Parent Financials ✓ Student Financials ✓ Sign & Submit 7

SIGN & SUBMIT
Read Before Proceeding

1 Carefully read and acknowledge whether you agree to our terms outlined below by selecting the checkbox at the bottom of this page.
Select "Sign and Submit FAFSA Form."

By signing this application electronically using your FSA ID (username and password) and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education.
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it.
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same period of time.

By signing this application electronically using your username and password, and/or any other credential or by signing a signature page and mailing it to us, you 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

1. information that will verify the accuracy of your completed form, and
2. U.S. or state income tax forms that you filed or are required to file.

By signing this application electronically using your username and password, and/or any other credential or by signing a signature page and mailing it to us, you 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

1. information that will verify the accuracy of your completed form, and
2. U.S. or state 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 with the Internal Revenue Service and other federal agencies.

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 purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

☒ I, T Perez, agree to the terms outlined above.

Previous Sign and Submit FAFSA Form

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

✓
Student Financials

7
Sign & Submit


SIGN & SUBMIT

Signature Status

1

A parent must sign the FAFSA® form. If you're a parent, select "Provide Parent Signature" to sign your child's FAFSA form.

Note: If you're the student and your parent isn't present, select "Save FAFSA Form" and then "Exit FAFSA." Your parent should log in to the FAFSA form using the student's identifiers and the save key to sign and submit your FAFSA form.



Student Signed With FSA ID

Signed With FSA ID

Last Name


Anderson

Date of Birth

08/09/2002


Social Security Number

***-**-1483



Parent Signature Needed

UNSIGNED

Provide Parent Signature 

Previous

✓
Student Demographics

✓
School Selection

✓
Dependency Status

✓
Parent Demographics

✓
Parent Financials

✓
Student Financials

7
Sign & Submit

SIGN & SUBMIT

Which parent are you?

Parent 1

⚠ Unsigned

Last Name
Taylor

Date of Birth
07/01/2000

Social Security Number
-----3006

Provide Parent Signature

Parent 2

⚠ Unsigned

Last Name
Perez

Date of Birth
02/17/2001

Social Security Number
-----1531

Provide Parent Signature

Previous

FederalStudentAid

UNDERSTAND
AID

APPLY FOR
AID

COMPLETE AID
PROCESS

MANAGE
LOANS

🔔

👤 TestM 🔍

Congratulations, TestM!

06/02/2021 14:42:08
Confirmation Number:
Data Release Number (DRN) 4454

Your FAFSA form was successfully submitted to Federal Student Aid.

Here's what happens next:

- You will receive an email version of this page.
- In 3-5 business days, you will receive an email notifying you that your FAFSA form was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

Do you have another child who needs to complete a FAFSA?

If so, you can transfer your information into a new FAFSA form for your other child to save time. You will have to provide a signature again, but that's all.

Transfer FAFSA Information

School(s) On Your FAFSA Form			
School Name	Graduation Rate	Retention Rate	Transfer Rate
Alabama Agriclt & Mechl Univ	25%	60%	41%
Alabama State University	N/A	N/A	N/A

STUDENT INFORMATION

Welcome to TestP Martinez's application!

2023–24

2022–23

Current Application Status:

Processed Successfully

Congratulations, your FAFSA form was successfully processed.

What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA form.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

Original Application: Submitted on 10/01/2022; Processed on 10/04/2021

You may take the following additional actions:



Add or Change Schools

Add, remove, or change schools and housing plans on your FAFSA form.

Add/Change Schools



Make Corrections to My FAFSA Form

Change or correct information on a previous FAFSA submission.

Make Corrections



View Student Aid Report (SAR)

Review your EFC, FAFSA answers, and financial aid history.

View SAR

Upon returning to a submitted, processed FAFSA, an individual should see this page. There are several actions that can be taken from here:

1. **Add or Change a School:** If a student only needs add or change a school listed on the FAFSA, that is a simple change that can be done through the “Add/Change Schools” option.
2. **Make Corrections:** If a student needs to change other data on the FAFSA, they can “Make Corrections.” Some examples of corrections include returning to the FAFSA to use the IRS Data Retrieval Tool or correct any errors made. **NOTE:** Some changes should not be made until you have consulted with the college. This includes a change in parent’s marital status or decrease in assets since the date of FAFSA filing.
3. **View Student Aid Report (SAR):** If you need to see the summary or submit the SAR for a scholarship, you can “View SAR.”

Professional Judgement Review/Special Circumstances Appeal

Because the FAFSA is a form, there are many facets of a student and their family's experiences and circumstances that are not accounted for when applying for financial aid.

Upon submitting the FAFSA, a student may follow up with the college(s) they are applying to for admission and request that the school consider additional or new information. This process is typically referred to as either a **professional judgement review** or **special circumstances appeal**. Especially because many experienced significant changes in their lives because of COVID-19 and the economic devastation it brought, students and families should carefully review if their 2021 taxes accurately reflect their current financial circumstances.

Students should contact the school if there has been a reduction or loss of income; change in employment for a member of the household; or other extenuating costs due to illness, hospitalization, etc. Please note, not all reasons to request a review or pursue an appeal will be related to COVID.

If a Student Advisor can assist you in navigating this process, please contact us by email at info@sfstl.org or phone at (314) 725-7990.

Frequently Asked Questions

If my parents are divorced, whose information do I need?

Report the information of the parent with whom you lived the most during the 12 months preceding the date you completed the FAFSA. It does not make a difference which parent claims you as a dependent for tax purposes. If you did not live with either parent or lived equally with each parent, the parental information must be provided for the parent from whom you received the most financial support during the preceding 12 months or the parent from whom you received the most support the last time support was given. *If your parents are divorced, but still share a household (live under one roof together), both parents' information is required in the FAFSA.*

What should I do if my parent with whom I live is remarried and my stepparent refuses to supply information?

If you are a dependent student and your parent is remarried, the stepparent's information is required. If you believe that your situation is unique or unusual other than the stepparent's simple refusal to provide the requested information, you should discuss the matter further with your financial aid administrator at the college or university which you plan to attend.

How are 529 savings plans reported on the FAFSA?

There are two types of Qualified Tuition Programs: tuition prepayment plans and college savings plans (529s). Both will have the plan value reported on the FAFSA as an asset of the owner (not the beneficiary), except when the owner is a dependent student, in which case the plan is an asset of the parent. So, regardless of whether student or parent is owner, it is always reported as an asset of the parent. The plan value is not reported as an asset if the owner is another person (i.e., grandparent or non-custodial parent). In addition, plan values of a student's sibling are also reported when the parent is the owner of the plans.

Whose income do I report if I live with a grandparent, aunt, etc. (other than a biological or adoptive parent)?

The FAFSA is clear—*only biological or adoptive parent information should be included in the FAFSA.* Students who reside with a grandparent, aunt/uncle, or another adult may, depending on circumstances, be considered an independent student, which means no parent/guardian information is required. Otherwise, students may need to pursue a dependency override or begin conversations with a parent to secure necessary information.

That's great, but I still want help.

Help text is available and accessible for every question on the FAFSA if you apply online. You can also get free live help online: <https://studentaid.gov/help-center/answers/landing>.

Contact the **Federal Student Aid Information Center**: 1.800.4.FED.AID (1.800.433.3243) for assistance with any questions you have regarding your FAFSA!

Scholarship Foundation's Student Advisors are available for FREE appointments to assist you. Please call (314) 725-7990 or email info@sfstl.org to schedule either a virtual or in-person appointment to file a FAFSA.



2023-2024 FAFSA Checklist

Complete the FAFSA (Free Application for Federal Student Aid) at <https://studentaid.gov/h/apply-for-aid/fafsa> to apply for federal, state, and college-based financial aid.

Dependent students must include parents' information on the FAFSA. To determine your dependency status, see dependency status worksheet.

REQUIRED INFORMATION	WHERE TO FIND IT
<input type="checkbox"/> 2021 Federal Income Tax Forms and, If applicable, Schedule K-1 (Form 1065)	Personal records or call the IRS at 800-829-1040—allow 10 days processing.
<input type="checkbox"/> 2021 W-2 Forms or 1099s	Personal records or contact your employer(s) or call the IRS at 800-829-1040
<input type="checkbox"/> Federal Student Aid (FSA) IDs	Create FSA ID Username and Password https://studentaid.gov/fsa-id/sign-in/landing .
<input type="checkbox"/> Student's driver's license number	Personal records
<input type="checkbox"/> Social Security Number (both student and parent)	Personal records or call the Social Security Administration at 800-772-1213
<input type="checkbox"/> Birth date (for both parents and student)	Personal records
<input type="checkbox"/> Date you or your parents were married, separated, divorced, or widowed.	Personal records
<input type="checkbox"/> Current (day of FAFSA filing) cash and checking/savings account balances.	Personal records or from your bank
<input type="checkbox"/> Current investment values (stocks, savings bonds, mutual funds, CDs) excluding parent's home and retirement plans.	Statements from the financial institution



2023-2024 Dependency Checklist

Dependency Status Questions		
Answer the following questions to determine your dependency status for the FAFSA.		
Were you born before January 1, 2000?	Yes	No
Are you married?	Yes	No
Will you be enrolled in a master's or doctorate program at the beginning of the 2023-24 school year?	Yes	No
Are you a veteran of the U.S. Armed Forces or currently serving on active duty?	Yes	No
Do you have children who will receive more than half of their financial support from you?	Yes	No
At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?	Yes	No
Are you or were you an emancipated minor as determined by a court in your state of legal residence?	Yes	No
Are you or were you in legal guardianship as determined by a court in your state of legal residence?	Yes	No
At any time on or after July 1, 2021, were you homeless?	Yes	No

If you answer "no" to **every** question, you are dependent and must provide parental information on the FAFSA.

If you answer "yes" to **any** question, you are independent and should not include parental information on the FAFSA.

Federal Student Aid (FSA) ID

Federal Student Aid IDs (FSA ID) are a username and password, created by the individual student and/or parent. FSA IDs are used to sign the Free Application for Federal Student Aid (FAFSA) and, as a result, are a crucial part of the FAFSA-completion process. All FAFSA-filers are required to create an FSA ID; if the student is dependent, a parent is strongly advised to create one as well. Here are a few recommendations regarding the FSA IDs.

- Create an FSA ID at <https://studentaid.gov/fsa-id/sign-in/landing>.
- FSA IDs are linked to the user's Social Security Number. *Please double check that the name, birthdate, and SSN used on the FSA ID application match **exactly** what is listed on your Social Security card.*
- Users are **required** to link an email address *and/or* a cell phone number to their FSA ID; a second step in this process is verifying one *or* both by entering a secure code that has been sent. **The FSA ID is not finalized until the email address and/or the cell phone number have been verified.** Remember:
 - A *verified* email address *and/or* cell phone number can be used interchangeably with the username, offering greater flexibility.
 - If the username and/or password are forgotten, a user may send a secure code to their *verified* email and/or cell phone number, which allows for easier retrieval and/or reset.
- As of July 2022, Federal Student Aid has instituted a two-step verification process. **All FSA ID users are required to set up, and use, two-step verification.** Individuals may use their verified email address and/or cell phone numbers for two-step verification; users also may use an authenticator app.
- Federal Student Aid does not permit passwords to include any aspects of the user's legal name, DOB, or SSN.
- Show text when answering challenge questions to ensure they are typed as intended.
- Write everything down and save in a safe, secure spot.
- Although it is understandable the many reasons why students create parent FSA IDs (and vice versa), it is advisable to avoid this unless necessary. When it is necessary, one suggestion is to use the same password for both accounts, to minimize what detail needs to be remembered.

Student: _____

Backup Code: _____

Email Address: _____

Username: _____

Password: _____

Challenge Questions and Answers:

Question #1: _____

Answer #1: _____

Question #2: _____

Answer #2: _____

Question #3: _____

Answer #3: _____

Question #4: _____

Answer #4: _____

Parent: _____

Backup Code: _____

Email Address: _____

Username: _____

Password: _____

Challenge Questions and Answers:

Question #1: _____

Answer #1: _____

Question #2: _____

Answer #2: _____

Question #3: _____

Answer #3: _____

Question #4: _____

Answer #4: _____

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