

Building the Dream of Going to College: Navigating the FAFSA

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Session Topics

- Why This Workshop Is Important to You as a High School Counselor
- Why FAFSA?
- FSA-ID
- Tips for Filling Out the FAFSA
- IRS-Data Retrieval Tool
- myStudentAid App
- Strategies for Success

“If you want to make your dreams come true, the first thing you have to do is wake up” –J.M. Power

The second thing is complete a FAFSA!-- L.A. Clark



2019 Texas House Bill 535

A BILL TO BE ENTITLED AN ACT

...relating to completion and submission of a financial aid application for costs of higher education as a condition of high school graduation for public school students.

Sec. 28.0256. FINANCIAL AID APPLICATION REQUIREMENT FOR HIGH SCHOOL GRADUATION.

(a) Before graduating from high school, each student must complete and submit a Free Application for Federal Student Aid (FAFSA) or, if applicable, a Texas Application for State Financial Aid (TASFA).

Why FAFSA?

Colleges create award packages including combinations of:

- Grants-**need-based**
- Work-Study-**best kept secret**
- Loans-**student/parent**
- Scholarships-**earned**
- Veterans Benefits-**GI Bill & Hazlewood Act**
- Tuition Initiatives



How much \$\$\$ can I get?

COA – EFC= Financial Need

Cost of Attendance

– Expected Family Contribution

= Financial Need

Does money REALLY grow on trees?



What is the FAFSA?

Free Application for Federal Student
Aid [FAFSA.gov](https://fafsa.gov)

Form Used to Calculate **EFC**

Foundation for **ALL** federal student aid

And **MOST** state and institutional aid

And **MANY** scholarships

FAFSA opens October 1st

FAFSA.com

STUDENT FINANCIAL AID
SERVICES INC.

[Returning Applicant Login](#)

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File your Application for Federal Student Aid.

Become a client of the nation's oldest and largest student aid advisory service for as little as \$79.99.

New FAFSA Applicant?

Which FAFSA are you

2012-13 - For Fall 2012 the

☐ Need a pri

File by phone. It's fast & easy
mediate guidance now!

4,8938

Advisor
you

to
Se H



File early to m
student aid elig

NOW ACC

2012

FAFSA App

>> Get Started Today

Client Feedback

"My Student Aid Advisor was
very helpful and she actually
helped save us about \$1,000
because of the information she
I neglected to put in when I tried to do
own..." Patricia

>>Read 80,000

FAFSA prepar

taxes, the FAFSA can be filed via paper or electronic. Professional assistance is available at www.fafsa.ed.gov. Many people, however, choose to use a FAFSA preparer, just like a tax preparer, for personal advice, consultation and of their important FAFSA application.

FAFSA Services

are looking for free services to assist you with your FAFSA or financial aid process, be sure to check out these support services.

[Getting FAFSA help](#)



[Home](#) | [FAFSA Help](#) | [Student Financial Aid Services](#) | [FAFSA Deadlines](#) | [Media Info](#) | [Client Feedback](#) | [Privacy Policy](#) | [Terms of Use](#) | [About Us](#) | [Site Map](#)



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LEARN Wheel of Fortune



Info on the FAFSA

- Identifies student by signing in with FSA-ID (electronic signature)
- Student demographic information
- School selection
- Dependency status
- Family demographic info
- Family/student financial/asset info
“Prior Prior”
- Sign & submit
- Confirmation



Before You Sit Down to Do FAFSA...

STUDENT:

- Legal Name, DOB, SSN, Permanent Address, Email with Access (not your school one), Driver's License #, Alien Registration # (if you're not a citizen)
- If you worked in 2018, your 1040 and W2's (if you worked but did not file, you will still need your W2's)

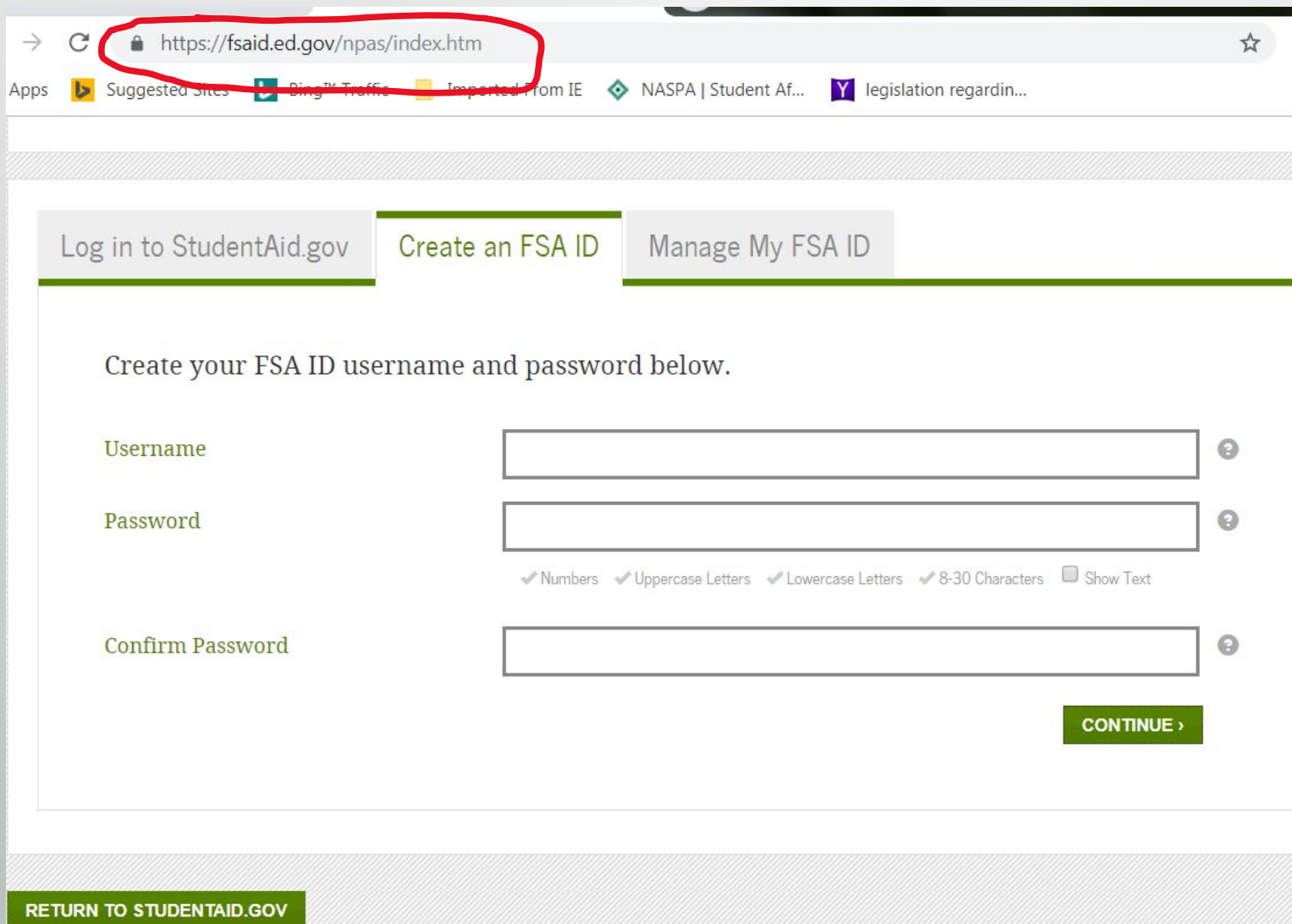
PARENT(S):

- Legal Name, DOB, SSN, Valid Email
- 2018 1040 and all W2's
- Untaxed Income/Benefits Received for All Family Members in 2018 (SSA, SSI, Child Support, TANF, Workers Comp, etc.)
- Asset Info-bank statements, investments, real estate, business and farm assets (not in all instances)

Who Is Considered a Parent?

- “Parent” is biological or adoptive parent or a person determined by the state to be a parent
- Grandparents, foster parents, legal guardians, and other relatives (even if student resides with) are NOT considered parents on FAFSA unless they have legally adopted student
- If legal parents are living and married to each other, answer questions about both
- If legal parents are not married but live together, answer questions about both
- If legal parents are divorced or separated, answer questions about the parent student lived with most during the last 12 months
- If student did not live with one parent more than other, use parent who provided most financial support during the last 12 months
- If student's divorced or widowed parent has remarried, s/he must include stepparent's information as well

Before FAFSA—Create FSA-IDs



The screenshot shows a web browser window with the address bar containing <https://fsaid.ed.gov/npas/index.htm>, which is circled in red. Below the address bar, there are several tabs: "Apps", "Suggested Sites", "Bing™ Traffic", "Imported From IE", "NASPA | Student Af...", and "legislation regardin...". The main content area has three tabs: "Log in to StudentAid.gov", "Create an FSA ID" (which is highlighted with a green border), and "Manage My FSA ID". Below these tabs, the text "Create your FSA ID username and password below." is displayed. There are three input fields: "Username", "Password", and "Confirm Password". Each field has a help icon (a question mark in a circle) to its right. Below the "Password" field, there are several checkboxes: "Numbers", "Uppercase Letters", "Lowercase Letters", "8-30 Characters", and "Show Text". At the bottom right of the form, there is a green button labeled "CONTINUE >". At the bottom left of the page, there is a green button labeled "RETURN TO STUDENTAID.GOV".

→ <https://fsaid.ed.gov/npas/index.htm>

Apps Suggested Sites Bing™ Traffic Imported From IE NASPA | Student Af... legislation regardin...

Log in to StudentAid.gov **Create an FSA ID** Manage My FSA ID

Create your FSA ID username and password below.

Username

Password

Confirm Password

✓ Numbers ✓ Uppercase Letters ✓ Lowercase Letters ✓ 8-30 Characters ☐ Show Text

CONTINUE >

RETURN TO STUDENTAID.GOV

Refer to Handout...

FSA-ID

- www.fsaid.ed.gov
- Student and one parent
- Electronic signature on FAFSA, FAFSA corrections, MPN, loan counseling
- Download the IRS-DRT on the FAFSA
- MUST have for the MyStudentAid app
- User/Password format
- Passwords expire every 18 months and must be reset
- What happens when you forget....
- Troubleshooting: Call Federal Student Aid at 1-800-433-3243 or use the Live Chat option

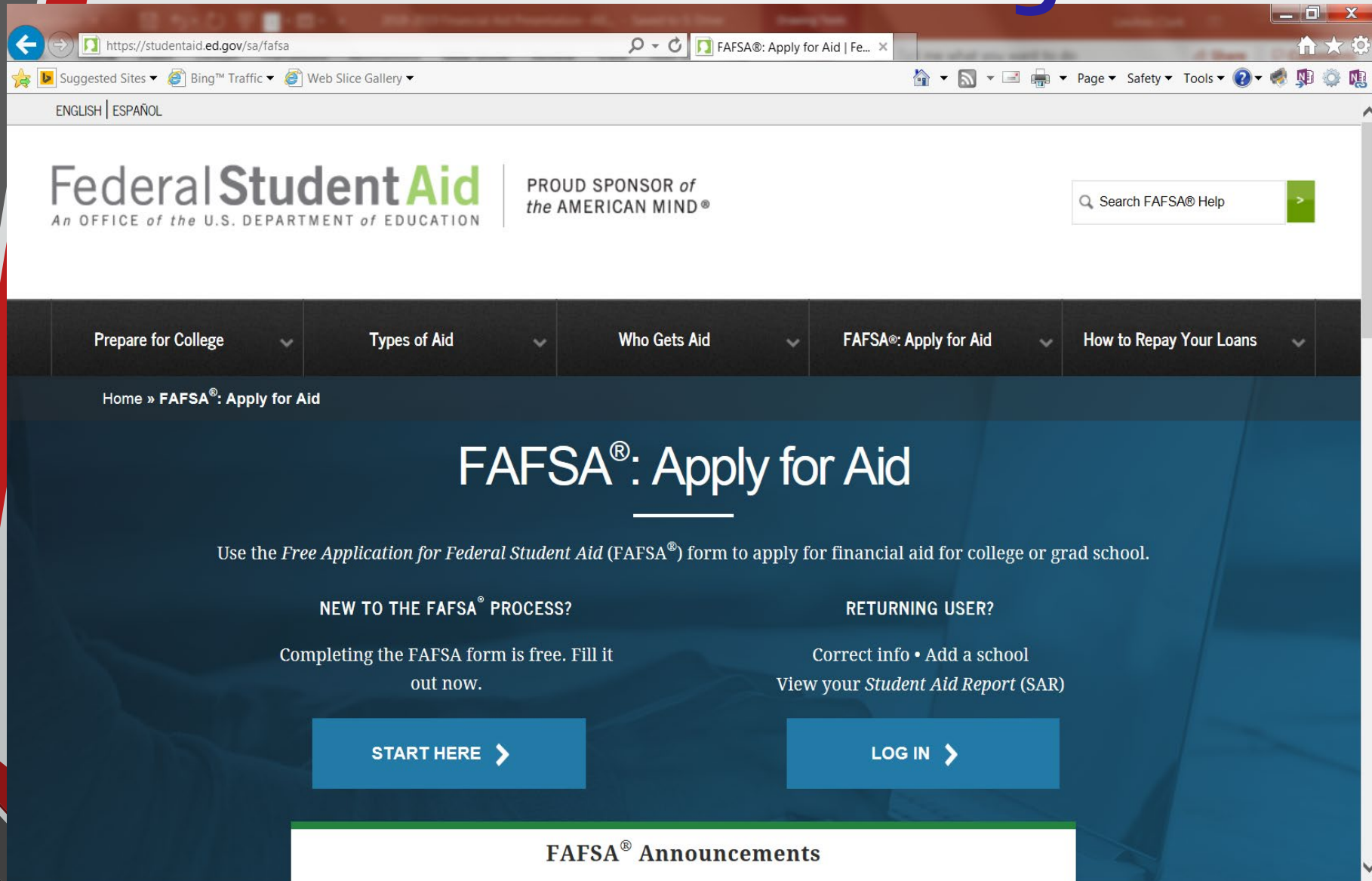


STRATEGY: Verify with both text and email

LEARN Wheel of Fortune



FAFSA Home Page



The screenshot shows the FAFSA Home Page in a web browser. The browser's address bar displays 'https://studentaid.ed.gov/sa/fafsa'. The page features the 'Federal Student Aid' logo, which includes the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION'. To the right of the logo is the text 'PROUD SPONSOR of the AMERICAN MIND®'. A search bar labeled 'Search FAFSA® Help' is located in the top right corner. Below the logo and search bar is a dark navigation bar with five menu items: 'Prepare for College', 'Types of Aid', 'Who Gets Aid', 'FAFSA®: Apply for Aid', and 'How to Repay Your Loans'. Below the navigation bar is a dark blue banner with the text 'Home » FAFSA®: Apply for Aid'. The main heading on the banner is 'FAFSA®: Apply for Aid'. Below the heading is the text 'Use the Free Application for Federal Student Aid (FAFSA®) form to apply for financial aid for college or grad school.' There are two columns of text below this. The left column is titled 'NEW TO THE FAFSA® PROCESS?' and contains the text 'Completing the FAFSA form is free. Fill it out now.' Below this text is a blue button labeled 'START HERE >'. The right column is titled 'RETURNING USER?' and contains the text 'Correct info • Add a school' and 'View your Student Aid Report (SAR)'. Below this text is a blue button labeled 'LOG IN >'. At the bottom of the page is a white box with the text 'FAFSA® Announcements'.

https://studentaid.ed.gov/sa/fafsa

FAFSA®: Apply for Aid | Fe...

ENGLISH | ESPAÑOL

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of
the AMERICAN MIND®

Search FAFSA® Help

Prepare for College ▾

Types of Aid ▾

Who Gets Aid ▾

FAFSA®: Apply for Aid ▾

How to Repay Your Loans ▾

Home » FAFSA®: Apply for Aid

FAFSA®: Apply for Aid

Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for financial aid for college or grad school.

NEW TO THE FAFSA® PROCESS?

Completing the FAFSA form is free. Fill it out now.

START HERE >

RETURNING USER?


Correct info • Add a school
View your *Student Aid Report* (SAR)

LOG IN >

FAFSA® Announcements

Who Are You?...

 Home

 Help

Login

Log in to the FAFSA

Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the **Save Key** that the student made. [Help for parents.](#)

Form Approved
OMB No. 1845-0001.
App. Exp. 12/31/2020.

☒ I am the student

OR

☐ I am a parent, preparer, or student from a
Freely Associated State

NEXT 

Site Last Updated: Sunday, April 28, 2019

Download [Adobe Reader](#)

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Log In...

[Home](#) [Help](#)

Login

Log in to the FAFSA

Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the **Save Key** that the student made. [Help for parents.](#)

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2020

☒ I am the student ☐ I am a parent, preparer, or student from a Freely Associated State

Do not log in with the FSA ID if you are not the student.

Don't have an FSA ID? [Create one](#) or login using the [student's identifiers](#).

Student's FSA ID Username, E-mail Address, or Mobile Number

[Forgot Username](#)

The student's FSA ID Password

[Forgot Password](#)

NEXT

[Home](#) [Help](#)

Login

Log in to the FAFSA

Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the **Save Key** that the student made. [Help for parents.](#)

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2020

☐ I am the student ☒ I am a parent, preparer, or student from a Freely Associated State

The student's first name

The student's full last name

The student's Social Security Number

[From a Freely Associated State?](#)

The student's date of birth (mm/dd/yyyy)

NEXT

Start Here...

Get Started

STUDENT INFORMATION

Welcome, lee clark!

Fill out your FAFSA form!

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

2020-2021 FAFSA Opens Oct 1st!

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?](#)

2020-2021

START 2019-2020 FAFSA

OR

~~START 2018-2019 FAFSA~~

Start Student's 2019-2020 FAFSA

STUDENT INFORMATION

Form Approved
OMB No. 1845-0001.
App. Exp. 12/31/2020.

Create a Save Key.

The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

Create a Save Key

Re-enter Save Key

 MY FAFSANEXT 

Student Demographic Info

✖ Exit

🗑️ Reset FAFSA

📄 View FAFSA Summary

✓ Save

❓ Help

Personal Information for Student

Student
Demographics



School Selection

Dependency Status

Parent
Demographics

Financial
Information

Sign & Submit

Confirmation

STUDENT INFORMATION



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

Your last name



Clark

Your first name



Lee

Your middle initial



A

College Selection

STUDENT INFORMATION

i Lee, based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.

i 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. If you're applying to more than 10 colleges, [follow these instructions](#).

Make sure you add ALL colleges you're interested in, even if you haven't applied or been accepted yet.

i Complete the fields below to search for a college to add to your FAFSA.

Do you know the college's [Federal School Code](#)? ?

☐ Yes ☒ No


State ?

Select ▼

City (optional) ?

 You can add up to 10 colleges to your FAFSA.

All of the information you include on your FAFSA, with the exception of the list of colleges, will be sent to each of the colleges you list. In addition, all of your FAFSA information, including the list of colleges, will be sent to your state grant agency.

 To select schools from the Search Results, click the checkbox to the left of each school you'd like to add to your FAFSA, then click **Next** or **Add More Schools** to continue.

Search Results: 1 to 1 of 1.

Sort By:

Best Match ▼

☐

School Name: [Texas Tech University](#)

City: Lubbock State: TX Federal School Code: 003644

◀ ◀ 1 ▶ ▶


ADD MORE SCHOOLS 


Dependency Questions


If you can check any of the following boxes, you will not have to provide parental information:


- ☐ I was born before January 1, 1997
- ☐ I am married
- ☐ I will be working on a master's or doctorate program
- ☐ I am serving on active duty in the U.S. Armed Forces
- ☐ I am a veteran of the U.S. Armed Forces
- ☐ I now have or will have children for whom I will provide more than half of their support between July 1, 2020 and June 30, 2021
- ☐ Once I turned age 13, both of my parents were deceased
- ☐ I was in foster care since turning age 13
- ☐ I have dependents (other than children or my spouse) who live with me and I provide more than half of their support
- ☐ I was a dependent or ward of the court since turning age 13
- ☐ I am currently or I was an emancipated minor
- ☐ I am currently or I was in legal guardianship
- ☐ I am homeless or I am at risk of being homeless


Dependency Questions

 Exit

 Reset FAFSA

 View FAFSA Summary

 Save

 Help

Student Demographics

School Selection

Dependency Status

Parent Demographics

Financial Information

Sign & Submit

Confirmation



PREVIOUS

NEXT

Parent Demographics

Exit

Reset FAFSA

View FAFSA Summary

Save

Help

Parent Marital Status

Student
Demographics

School Selection

Dependency Status

Parent
Demographics

Financial
Information

Sign & Submit

Confirmation

PARENT INFORMATION

i Because the FAFSA 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?



07/1990

PREVIOUS

NEXT

Family Size

✖ Exit

🗑️ Reset FAFSA

📄 View FAFSA Summary

✓ Save

❓ Help

Parent Household Info

Student
Demographics



School Selection



Dependency Status



Parent
Demographics



Financial
Information

Sign & Submit

Confirmation

PARENT INFORMATION

Household Size

Your parents

2

Yourself, even if you do not live with your parents

1

Your parent's other children (even if they do not live with your parents) if:

- a. Your parents will provide more than half of their support from July 1, 2019 through June 30, 2020 or
- b. These children can answer "No" to every [Dependency Status question on the FAFSA](#)

3



LEARN Wheel of Fortune



IRS-Data Retrieval Tool

i Attention! You must provide financial information from your parents' ~~2017~~ **tax return** on the following pages.

For ~~2017~~, have your parents completed their IRS income tax return or another tax return? ?

Already completed ▼

For ~~2017~~, what is your parents' tax filing status according to their tax return? ?

Married-Filed Joint Return ▼

Did your parents file a Puerto Rican or foreign tax return for ~~2017~~? ?

☐ Yes ☒ No

2018

IRS Data Retrieval Tool

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

LINK TO IRS 

← PREVIOUS

NEXT →

IRS-DRT

- “Prior Prior” tax information
- Accurate reporting of tax documents
- Avoid verification
- Parent and student must have an FSA-ID
- When you can’t use the DRT
- 1040 versus IRS Tax Transcript
- IRS Form 4506-T
- Common issues

Refer to Handouts



1040 Versus Tax Return Transcript

Form **1040** Department of the Treasury—Internal Revenue Service (99) **2018** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing status: ☐ Single ☐ Married filing jointly ☐ Married filing separately ☒ Head of household ☐ Qualifying widow(er)

Your first name and initial: **Mindy C** Last name: **Perez** Your social security number: **645-07-1258**

Your standard deduction: ☐ Someone can claim you as a dependent ☐ You were born before January 2, 1954 ☐ You are blind

If joint return, spouse's first name and initial: Last name: Spouse's social security number:

Spouse standard deduction: ☐ Someone can claim your spouse as a dependent ☐ Spouse was born before January 2, 1954 ☒ Full-year health care coverage or exempt (see inst.)

☐ Spouse is blind ☐ Spouse itemizes on a separate return or you were dual-status alien

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Presidential Election Campaign (see inst.) ☐ You ☐ Spouse

1006 Veal Ave PO Box 397

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6. If more than four dependents, see inst. and ✓ here ▶ ☐

Sundown TX 79372

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✓ If qualifies for (see inst.):
				Child tax credit Credit for other dependents
Alexander Z	Perez	633-58-9091	Son	<input type="checkbox"/> <input checked="" type="checkbox"/>
Alexis M	Perez	628-68-1954	Daughter	<input type="checkbox"/> <input checked="" type="checkbox"/>
Belisario T	Perez	643-80-9825	Son	<input checked="" type="checkbox"/> <input type="checkbox"/>

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.

Your signature: *Mindy C Perez* Date: Your occupation: **Office Administrator** If the IRS sent you an Identity Protection PIN, enter it here (see inst.):

Spouse's signature: If a joint return, both must sign. Date: Spouse's occupation: If the IRS sent you an Identity Protection PIN, enter it here (see inst.):

Paid Preparer Use Only

Preparer's name: Preparer's signature: PTIN: Firm's EIN: Check if: ☐ 3rd Party Designee ☐ Self-employed

Firm's name ▶ **Self-Prepared** Phone no.:

Firm's address ▶:

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. BAA REV 01/07/19 1040-1040-1040-1040 Form **1040** (2018)

1040

Tax Return Transcript

Internal Revenue Service
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date: 08-15-2018
Response Date: 08-15-2018
Tracking Number: 100403489473

Tax Return Transcript

SSN Provided: 466-81-3347
Tax Period Ending: Dec. 31, 2017

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

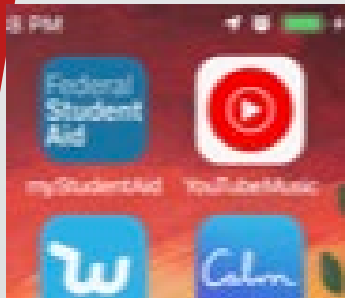
051679

NAME(S) SHOWN ON RETURN: **BELISARIO & MINDY C PEREZ JR**

ADDRESS: **PO BOX 397
SUNDOWN, TX 79372-0397-977**

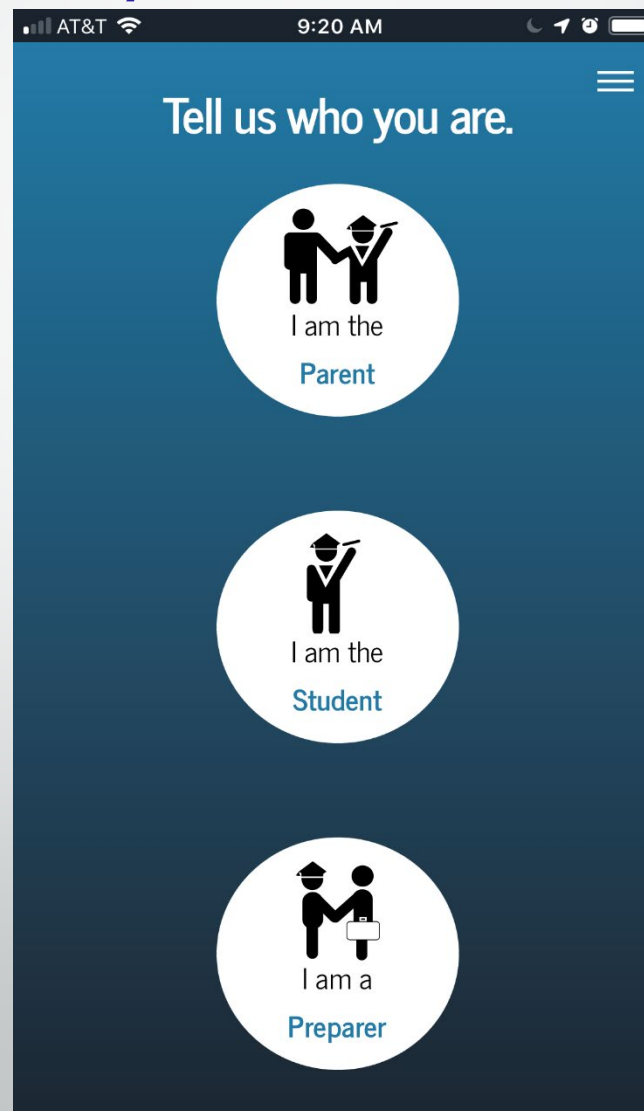
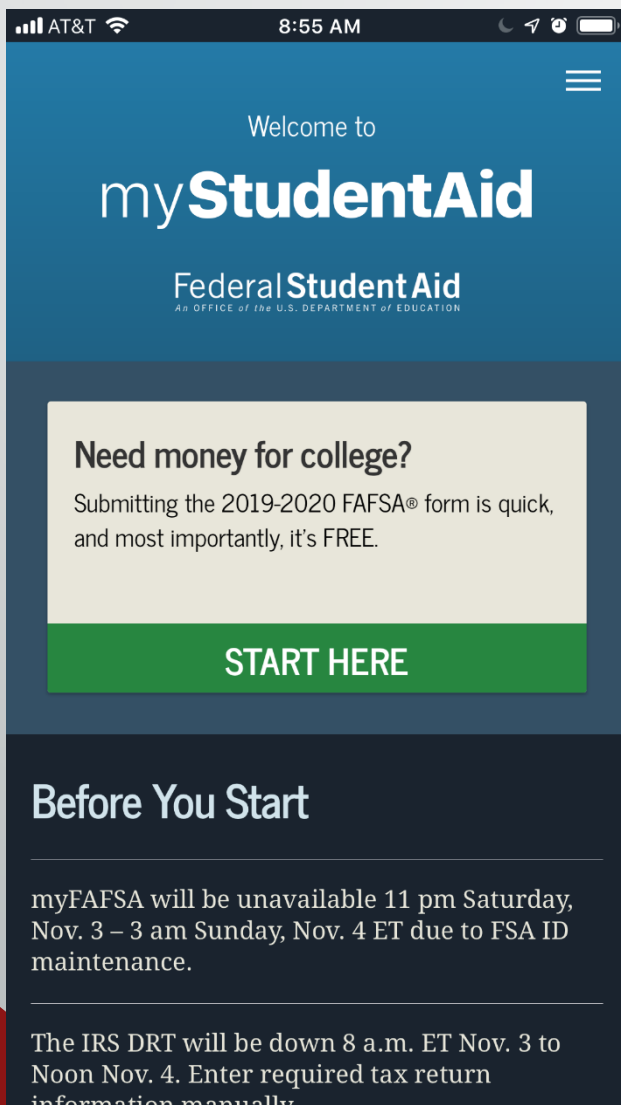
FILING STATUS: **Married Filing Joint**
FORM NUMBER: **1040A**
CYCLE POSTED: **20180605**
RECEIVED DATE: **Apr. 15, 2018**
REMITTANCE: **\$0.00**
EXEMPTION NUMBER: **4**
DEPENDENT 1 NAME CTRL: **PERE**
DEPENDENT 1 SSN: **628-68-1954**
DEPENDENT 2 NAME CTRL: **PERE**
DEPENDENT 2 SSN: **643-80-9825**
DEPENDENT 3 NAME CTRL:

SSN: 466-81-3347
SPOUSE SSN: 645-07-1258

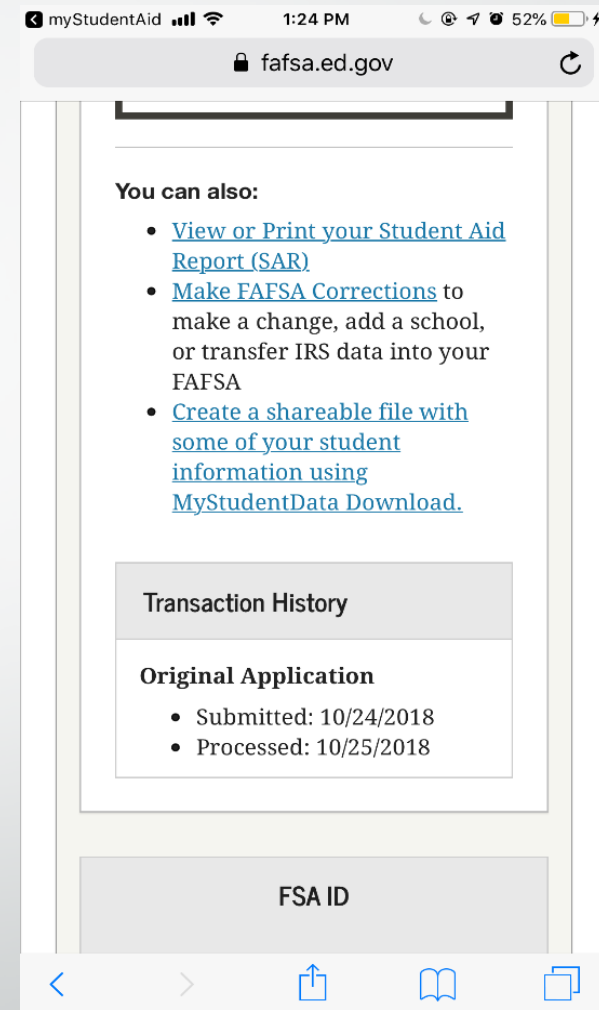
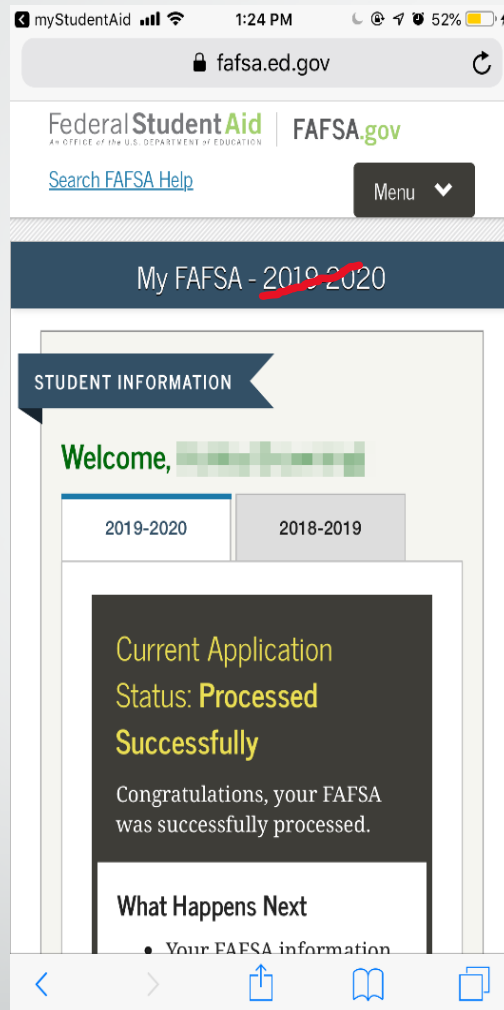
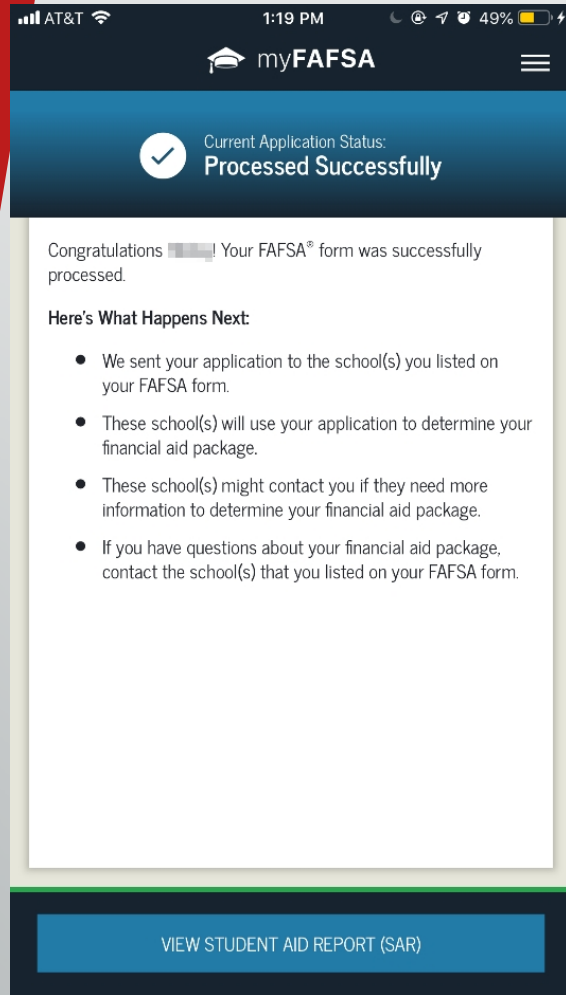


FAFSA App

Available on App store (iOS) or on Google Play (Android)



MyStudentAid



Warning: Customers using an Apple device (mobile or desktop) may encounter errors on some FAFSA fields if the "smart punctuation" feature is enabled. This feature changes apostrophes and quotation marks to invalid characters that the FAFSA form cannot recognize.

Steps of the Process!

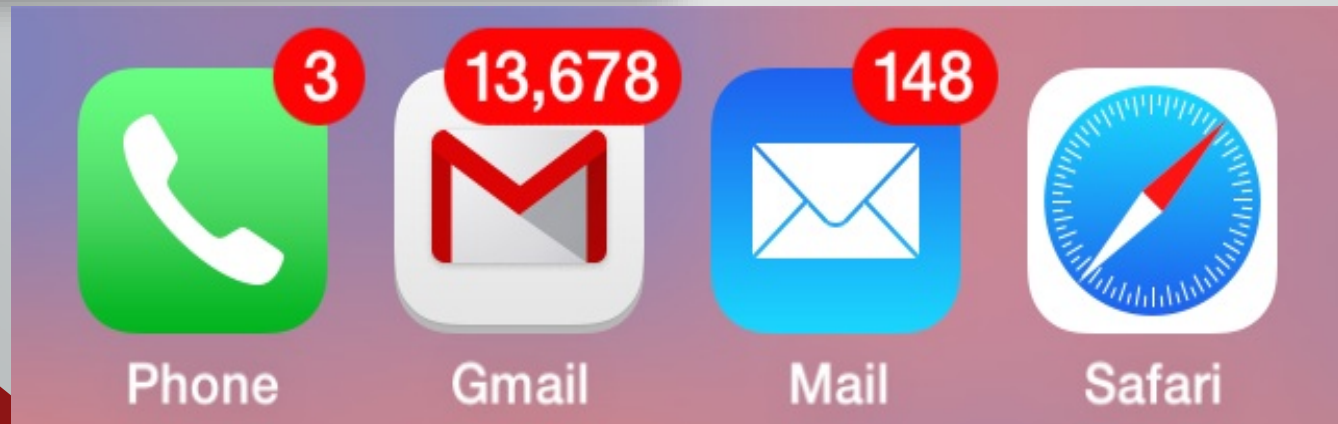
1. Apply for college admissions and be accepted
2. Create an FSA ID at www.fsaaid.ed.gov
3. Fill out the FAFSA www.fafsa.gov
4. Review your SAR = Student Aid Report
5. If selected for 'verification' you MUST provide additional information to the college on time
6. Be sure that you have completed everything by contacting your school's financial aid office
7. Continue to check your Student Portal for **Holds**
8. Review your Financial Aid Notification Letter
9. Attend Orientation and register for classes

Students--Be Responsible!



Avoid Senioritis!
(very contagious!!)

Check E-mails!
OFTEN!



Common Errors

- **Student Demographics**: nickname; high school email; males who fail to register with Selective Service
- **School Selection**: forget to add housing plans; forget to add college to FAFSA if they change their minds in summer
- **Dependency Status**: military service—Reserves do not qualify unless called to active duty other than training; Orphan/Foster Care/Ward of Court”—must be at or after age 13—if adopted before 13, must use adoptive parent info; legal guardianship; unaccompanied or homeless youth at risk of being homeless
- **Parent Demographics**: parent marital status does not match in both places; parent SSN did not clear with SSA—did not use legal name

Common Errors

- **Financial Information:** regardless of how parent/s file their 1040; definition of parent—whose income to use on FAFSA; blended families; must report federal benefits for ALL household members—SNAP/TANF, SSI, etc.; indicate “already completed” for the IRS-DRT; do not report negative wages failure to report asset info; if NOT using DRT, be sure to follow line numbers & report Education Credits—lowers EFC
- **Sign & Submit:** If parent does not have SSN, must use signature page; missing signatures from parent/student

AFTER FAFSA

LEARN Wheel of Fortune



Counselor Strategies for Success

- Conduct event/s to create FSA-IDs for student and one parent **before** October 1st of senior year
- Have student establish a “college only,” mature email
- Ensure that parent/s have access to the email they use for FSA-ID and FAFSA
- Utilize free FSA resources—**SEE RESOURCES**
- Provide students/parents with info on counselor website, resource guides, “how-to” worksheets, etc.
- Emphasize summer “homework”—final transcripts, meningitis vaccinations, and TSI compliance—the three most common holds!
 - Experienced counselors—**IDEAS???**

LEARN Wheel Bonus Round



QUESTIONS????