



# **FAFSA Overview**











### What Is Financial Aid?

Financial aid consists of funds provided to students and families to *help* pay for postsecondary educational expenses.



Free Money – Grants/Scholarships



Earned Money - Work, Savings, Tuition Account Programs, etc.



Borrowed Money - Loans



### **Funding Sources**



# Federal Government



## **State Government**



# School or College



# Scholarships

### Financial Aid Made Simple

### **5 Steps to Financial Aid**

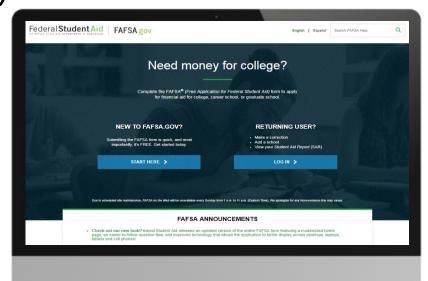
Step 1 Step 2 Step 3 Step 4 Step 5 Compare Be sure Look for Know schools Fill out you have FREE your financial the the specific money FAFSA aid offers money deadlines first carefully you need

### Free Application for Federal Student Aid

 The FAFSA is the primary federal form for financial assistance to attend postsecondary school.

 Must file a FAFSA each year a student attends school to be eligible.

 The FAFSA is available as early as October 1 of student's senior year of high school



https://studentaid.gov/fafsa

### **Create Your FSA ID**

- The student applying for aid and one parent providing information on the FAFSA need to create an FSA ID at fsaid.ed.gov.
- Create prior to completing the FAFSA.
- Legal signature for student and parent.

Username

**Password** 

**Email Address** 

Mobile Phone

**Security Questions** 

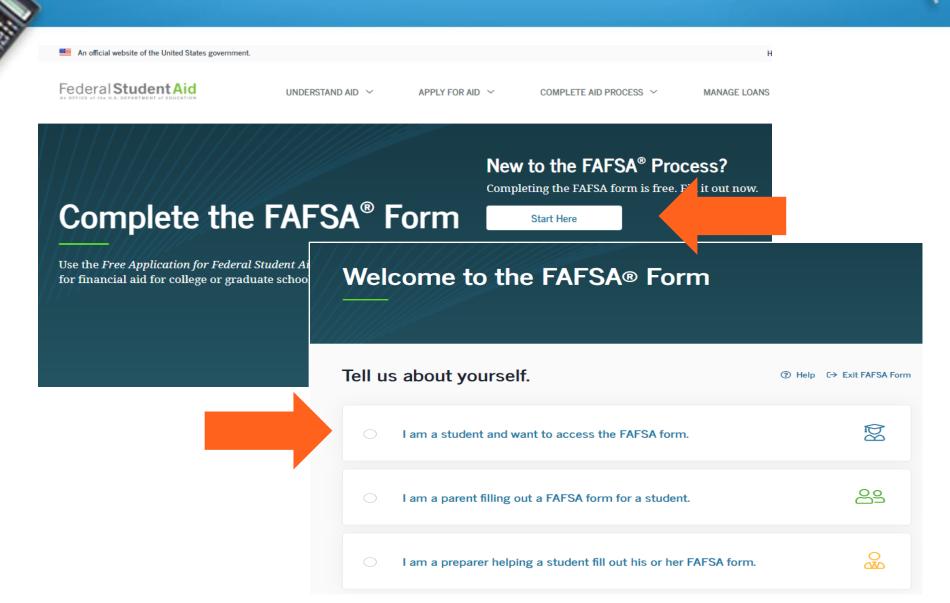
Social Security Number

### Information Needed for the FAFSA

School Year	Submission Period	Tax Information Required
Jul 1 2022 - Jun 30, 2023	Oct 1, 2021 – Jun 30, 2023	2020
Jul 1, 2023 –Jun 30, 2024	Oct 1, 2022 – Jun 30, 2024	2021
Jul 1, 2024 – Jun 30, 2025	Oct 1, 2023 – Jun 30, 2025	2022

✓ Social Security Numbers, Federal Tax Returns and W-2s, Untaxed Income, Checking/Savings Account Statement Balances and Investment Records as of filing date

### Login at studentaid.gov



### **Get Started**

#### Start Student's 2022–23 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.

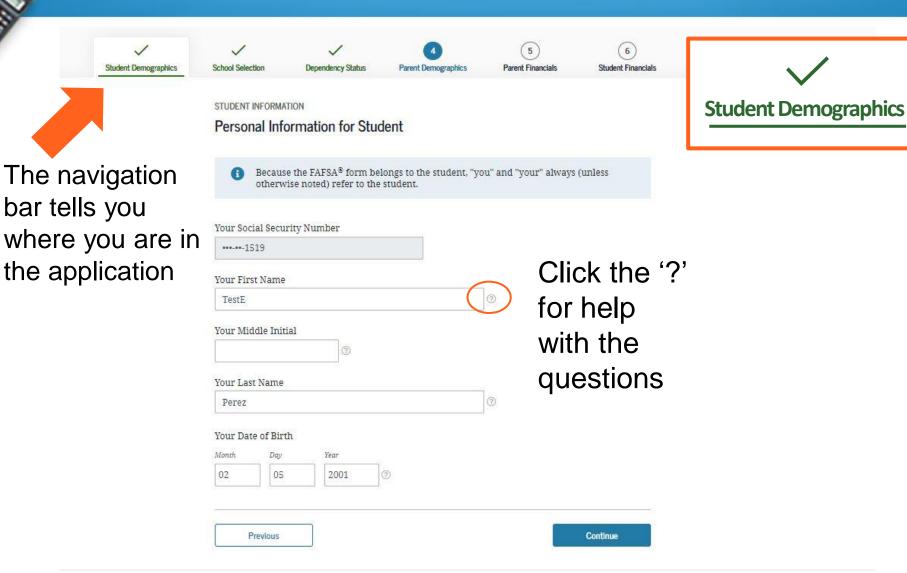
# Create a Save Key Show Reenter Save Key Show ?

#### Write this down!

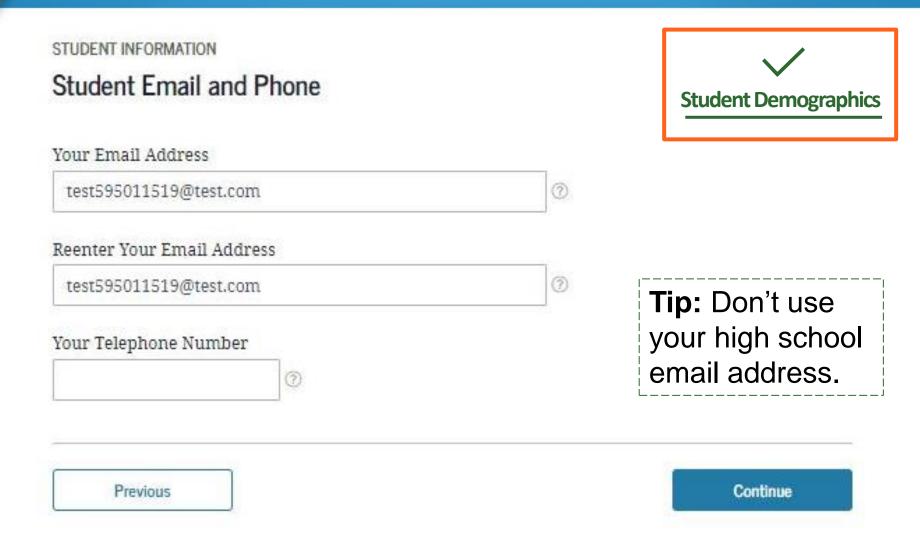
This will allow you to save the FAFSA and come back to it later if you cannot finish in one sitting.

**Previous** 

### Personal Information for Student



### Student E-mail and Phone Number



### Student Address

STUDENT INFORMATION

#### **Student Address**

Your Permanent Mailing Address (include apt. number)

1122 STRAIGHT STREET

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

?

Your State

Pittsburgh

Pennsylvania v

Your ZIP Code

15235

**Previous** 

### Student Residency and Eligibility



#### Student Residency and Eligibility

Student Demographics

Have you lived in Pennsylvania for at least 5 years? ②

- Yes
- O No

Are you a U.S. citizen?

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

**Previous** 

### State of Legal Residence



#### Student Residency and Eligibility

Have you lived in Pennsylvania for at least 5 years? ?



No

Are you a U.S. citizen?

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

**Previous** 



STUDENT INFORMATION

#### Student Residency and Eligibility



You are eligible to transfer your FAFSA® information into Pennsylvania's state student aid application. Use the "Start your state application" link on the FAFSA confirmation page to transfer your information.

**Note:** This feature is only displayed once on the confirmation page after submitting your FAFSA form.

Have you lived in Pennsylvania for at least 5 years? ?



Yes



Are you a U.S. citizen?

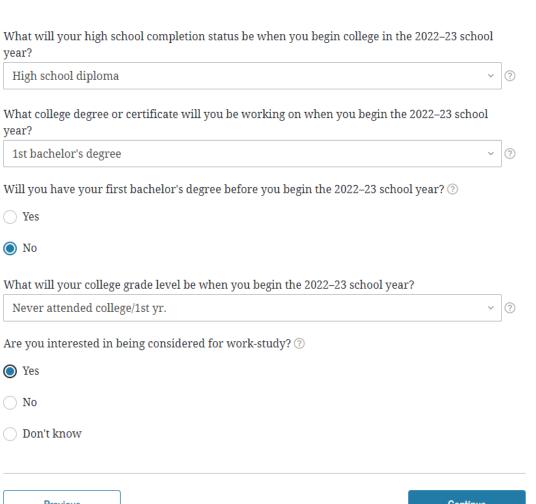
Yes, I am a U.S. citizen (or U.S. national).



### **Student Education**



#### Student Education





**Previous** 

### **Student Selective Service**



#### Student Selective Service



Are you male or female? ②

- Male
- Female

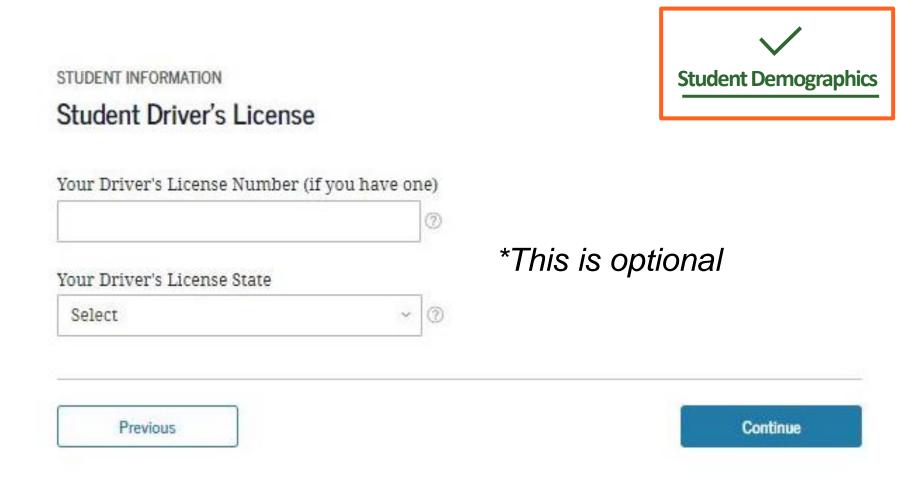
Are you registered with the Selective Service System? ⑦

- Yes
- O No

The answer to the Selective Service question will not impact the applicant's eligibility to receive federal student aid

Previous

### **Student Driver's License**



### Foster Care & Education Completion

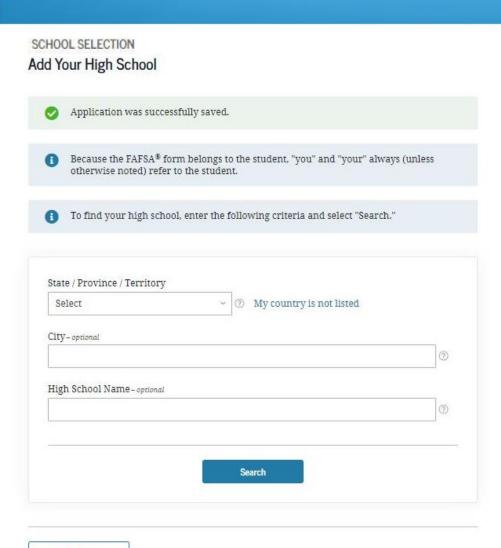


#### Student Foster Care and Parent Education Completion



Are you a foster youth or were you in the	he foster care system at any t	ime? ②
Yes		
○ No		
What's the highest school completed by	Parent 1?	
Select	~ ②	Select the answer that best describes your
What's the highest school completed by	Parent 2?	parent's (birth or
Select	· 0	adoptive) highest level of education completed
Previous		Continue

### Search for High School

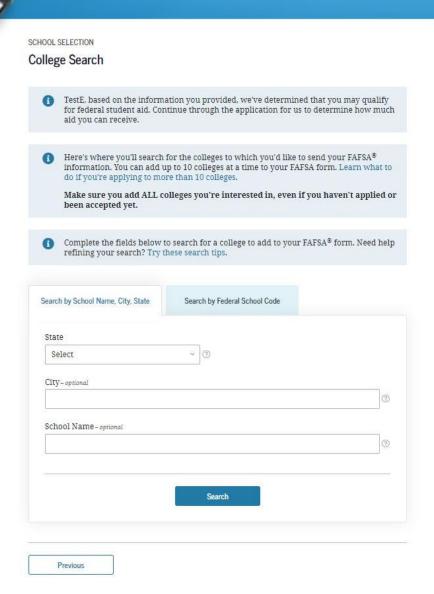


Previous



Click 'Search' and select your High School from the list that appears

### Search for Colleges



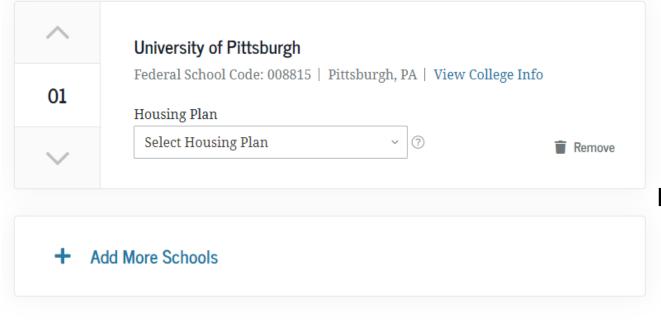


- List more than one!
- Only schools that are listed will be able to see your FAFSA information.
- Students can list up to 10 colleges at a time – Schools can be added or deleted at any time
- Once the final school choice is made, students should update their PA State Grant record.

### Selected Colleges and Housing Plans

#### SCHOOL SELECTION

Selected Colleges and Housing Info



School Selection

Housing choices are:

- > on campus
- > off campus
- with parent

Compare All Schools

Previous

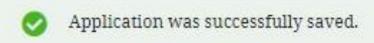
### **Student Marital Status**

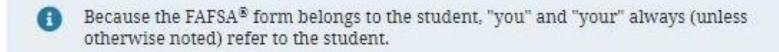




STUDENT INFORMATION

#### Student Marital Status





What is your marital status as of today?



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### **Does Student Have Dependents?**



#### 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, 2022 and June 30, 2023? ③

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, 2023? ②

Yes



**Previous** 

### **Additional Dependency Questions**

#### STUDENT INFORMATION

#### 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." ②





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### **Student Homelessness**



STUDENT INFORMATION

#### Student Homelessness Filter Question

On or after July 1, 2020, were you homeless or were you self-supporting and at risk of being homeless? ②

Yes

O No

Previous

### Dependent Student



**Dependency Status** 

STUDENT INFORMATION

#### 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. ①

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

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### Who Else's Info Needs to Be Reported?

### YES

- Married parents living together
- Biological parents living together
- Divorced or separated parents:
  - The parent the student lived with the most over the past 12 months
  - ❖If equal, then the parent who provided more than 50% of student's support
- Stepparent If part of the student's household
- Adoptive parents

### NO

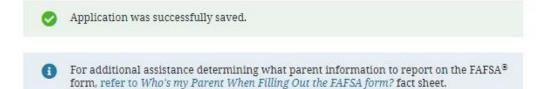
- Foster Parents
- Legal Guardians
  - By Court Order
- Anyone else the student is living with



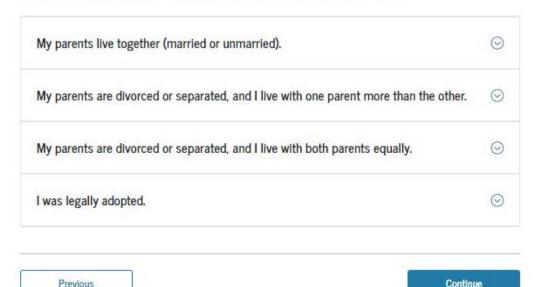
### Whose Information Should I Provide?

PARENT INFORMATION

#### Whose Information Should I Provide?



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:







PARENT INFORMATION

#### Parent Marital Status





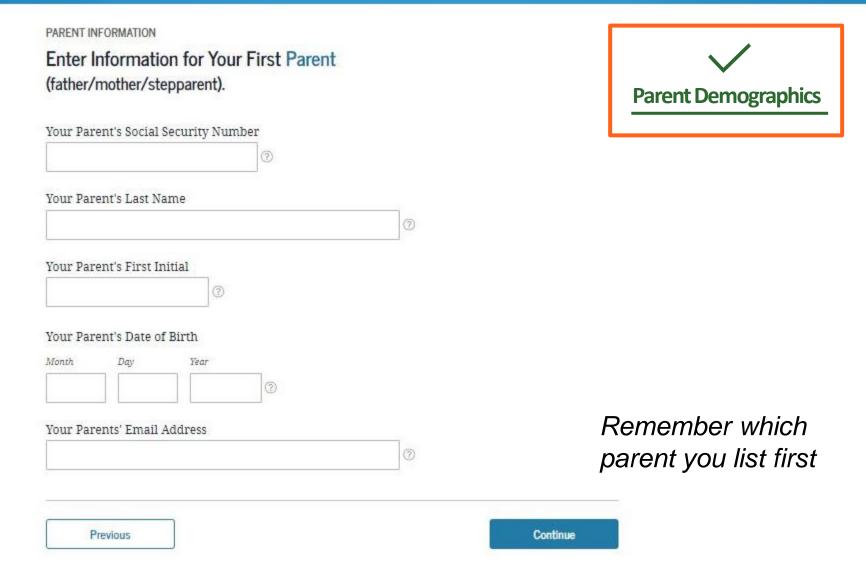
Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

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

Married or remarried When did your parents get married or remarried? Month Year 1994 08

Previous

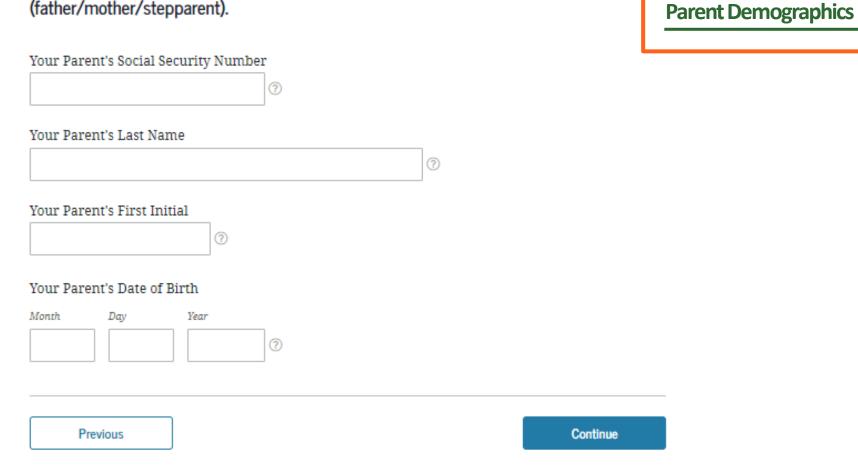
### **Personal Information for Parent**



### Personal Information for Other Parent

#### PARENT INFORMATION

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



### Parent State of Legal Residence



#### Parent State of Legal Residence



Have your parents lived in Pennsylvania for at least 5 years? ②

O Yes

O No

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### Parents' Dependents



#### Enter Information for Your Parents' Dependents



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, 2022 and June 30, 2023;

or

• can answer "no" to every dependency status question on the FAFSA® form.

10
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, 2022 and June 30, 2023.

?

### Parent Household Information



#### Parent Household Information





#### Number in College

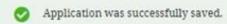
Out of the **2** dependents in your parents' household (as shown above), how many will be college students between July 1, 2022 and June 30, 2023? **DO NOT include your parents, but DO include yourself** and other members of the household.

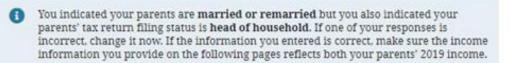
Previous

### Parent Tax Filing Status

PARENT INFORMATION

#### Parent Tax Filing Status





Parent Financials

For 2020, 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 2020?

IRS Form 1040

For 2020, 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)!

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

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Skip IRS DRT and Complete Manually

Proceed to the IRS >

### Parent Eligible for IRS DRT





#### 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

### Parent IRS Info



### Parent IRS Info

Parent Financials

What was your parents' adjusted gross income for 2020?

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

\$ .00 ②

Calculate with Income Estimator

Previous

Continue

\*If you don't use IRS DRT, you will need to answer this question \*If you use the DRT the amount will show as "Transferred from the IRS"

## Parent Income from Work



#### PARENT INFORMATION

### Parent Income from Work

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2020?

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).



How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2020?

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).



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## Parent Additional IRS Info



#### PARENT INFORMATION

### Parent Additional IRS Info

Enter the amount of your parents' income tax for 2020.

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

\$ .00 ②

Previous

### Parent Questions for Tax Filers Only



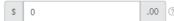
#### Parent Questions for Tax Filers Only

Did your parents have any of the following items in 2020? 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.



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.



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



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



IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS form 1040 Schedule 1-total of lines 15+19.



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



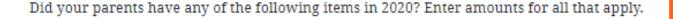


**Parent Financials** 

## Parent Additional Financial Info



### Parent Additional Financial Info





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



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



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



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### **Parent Untaxed Income**

PARENT INFORMATION

#### Parent Untaxed Income

Did your parents have any of the following items in 2020? Enter amounts for all that apply.



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

\$	0			.00	G
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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).

\$	0	.0	00	?
----	---	----	----	---

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

\$	0	.00	?
----	---	-----	---

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

\$	0	.00	?
----	---	-----	---

Don't include untaxed social security benefits or Supplemental Security Income

Previous

### **Parent Assets**



### Parent Assets



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

	ho.	10
2	.00	(3)

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



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.



Asset values are as of the day you are filing the FAFSA

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#### Student Assets

As of today, does the total amount of your (and your spouse's) current assets exceed \$2,200? ②



No

As of today, what is your (and your spouse's) total current balance of cash, savings, and checking accounts?



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



As of today, what is the net worth of your (and your spouse's) 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.



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Continue



Student is presented with same income questions as the parent financials section

If the student filed a tax return, use the IRS DRT to transfer income into the **FAFSA** 

## Signature Status

SIGN & SUBMIT

#### Signature Status



A parent must sign the FAFSA <sup>®</sup> 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

Social Security Number

08/09/2002

....1483



#### Parent Signature Need



Provide Parent Signature

200

### Parent 1



Last Name

Taylor

SIGN & SUBMIT

Which parent are you?

Date of Birth Social Security Number

07/01/2000 -----3006

Provide Parent Signature

200

#### Parent 2



Last Name

Perez

Date of Birth Social Security Number

02/17/2001 -----1531

Provide Parent Signature

**Previous** 

Previous

## **Agreement of Terms**

SIGN & SUBMIT

#### Read Before Proceeding

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 PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked to provide

- 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

Continue



SIGN & SUBMIT

#### Signature Options

#### Parent Signature for: Perez

Date of Birth Social Security Number 02/17/2001 -----1531

not enter the FSA ID if you	
ent's FSA ID Username, Er	mail Address, or Mobile Number
	3
	Forgot Username   Create an FSA ID
ent's FSA ID Password	
	Show ?
	Forgot Password

## **Confirmation Page**



Your FAFSA form was successfully submitted to Federal Student Aid.

☐ FAFSA Home ☐ Exit FAFSA Form ② Help

#### 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).

An abbreviated version of your confirmation page has been sent to you at the following email address:

Print This Page 🖨

Start your state application to apply for Pennsylvania state-based financial aid.

Apply Now

We want to hear from you!

Fill out Our Short Survey

Share with your friends!





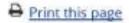
## Completing the PA State Grant Form

### Pennsylvania State Grant Form 2022-23

### **Getting Started**

As the Student applying for a Pennsylvania State Grant, here's some information that you'll want to have ready.

- If applicable, the month and year your diploma was received (for High School or GED).
- If married, your spouse's 9-digit Social Security Number.
- If you have a savings account through PA 529, you may need a recent account statement for the total savings, or visit pa529.com.
- Adobe Reader is required to view and print your PA State Grant Form. The plug-in is available as a <u>free</u> download from Adobe.

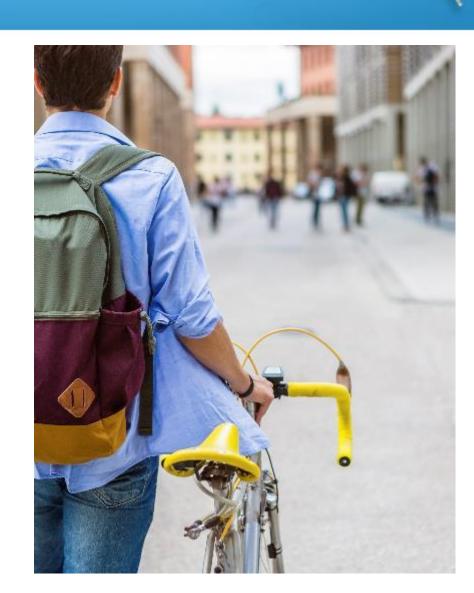


CONTINUE »

## **Special Circumstances**

### If things change....

- Recent death or disability
- Reduced Income
- Living with others
- Divorced or separated parents

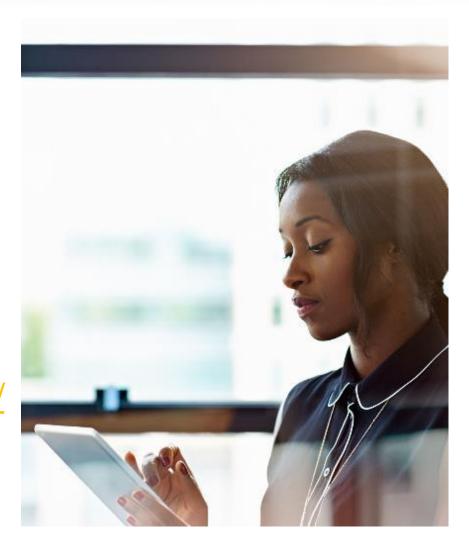


# College Scholarship Service (CSS) Profile

- Used by some schools to award need based & institutional aid
- Does NOT replace the FAFSA
- There is a cost to complete

https://www.collegeboard.org/







### What Can You Do Now?

Visit College Websites

Create FSA ID & Complete the FAFSA

Utilize Net Price Calculators collegecost.ed.gov

Explore Scholarships Estimate Federal Student Aid

studentaid.gov/aid-estimator

Talk About What is Affordable

### Important Resources

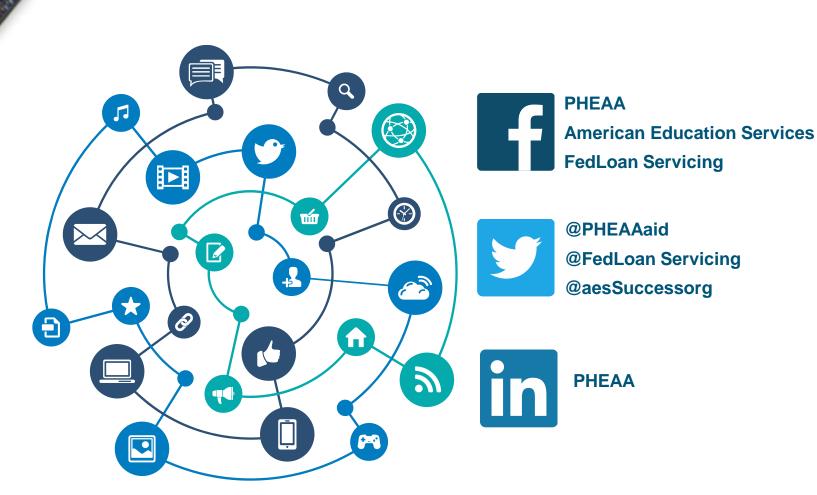
- PHEAA.org
- StudentAid.gov
- CollegeCost.ed.gov
- EducationPlanner.org
- MySmartBorrowing.org

### **Scholarship Sites**

- Collegeboard.org
- Fastweb.com
- Peerlift.org
- Scholarshipamerica.org



## **Social Media Outreach**







Higher Education Access Partner

Allegheny County

717-433-3847

Amy.Sawdey@pheaa.org







