

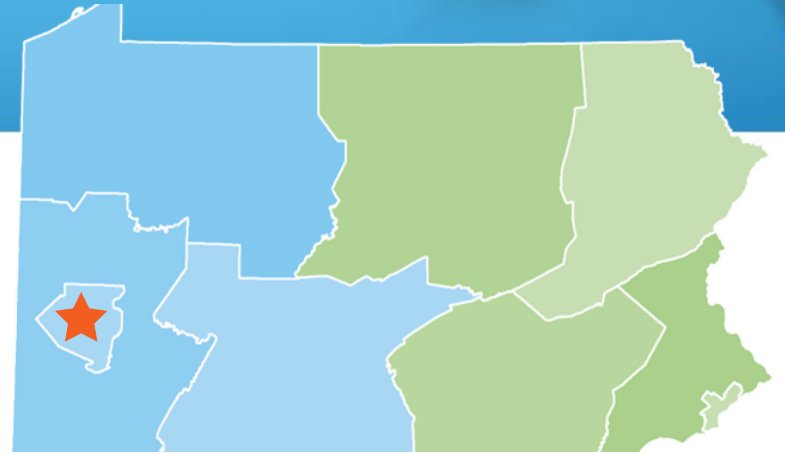
# Financial Aid 101



## FAFSA Overview

# Your Presenter

2



**Amy Sawdey**

Higher Education Access Partner

Allegheny County

PA Higher Education Assistance Agency (PHEAA)

717-433-3847

[Amy.Sawdey@pheaa.org](mailto:Amy.Sawdey@pheaa.org)

# Financial Aid Made Simple

## 5 Steps to Financial Aid

### Step 1

Look for  
**FREE**  
money  
first

### Step 2

Know  
your  
specific  
deadlines

### Step 3

Fill out  
the  
FAFSA

### Step 4

Compare  
schools  
financial  
aid offers  
carefully

### Step 5

Be sure  
you have  
the  
money  
you need

## Step 3: The FAFSA is Your Connection to Funding

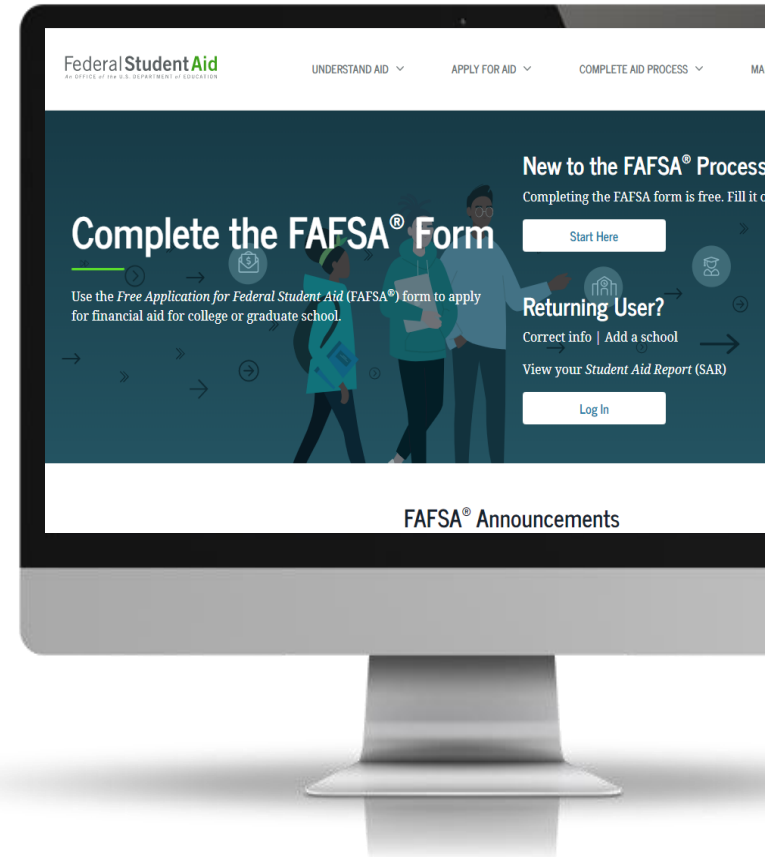
The FAFSA is a federal form used to determine student eligibility for the following:

- Federal programs
- State programs
- School programs

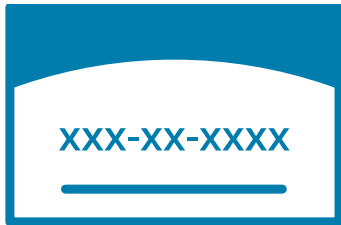


# FAFSA

- File a FAFSA each year
- File online at [studentaid.gov/fafsa](https://studentaid.gov/fafsa)
- Students do not have to be accepted for admission to list a school on the FAFSA.



# Information Needed for FAFSA



**Social Security  
Numbers**



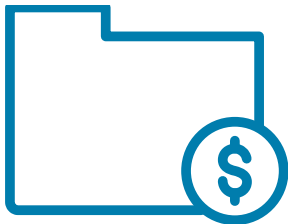
**Federal Tax  
Returns and  
W-2's (2021)**



**2021 Untaxed  
Income**



**Checking and  
Savings Account  
Statement  
Balances as of  
FAFSA Filing Date**



**Investment  
Records**



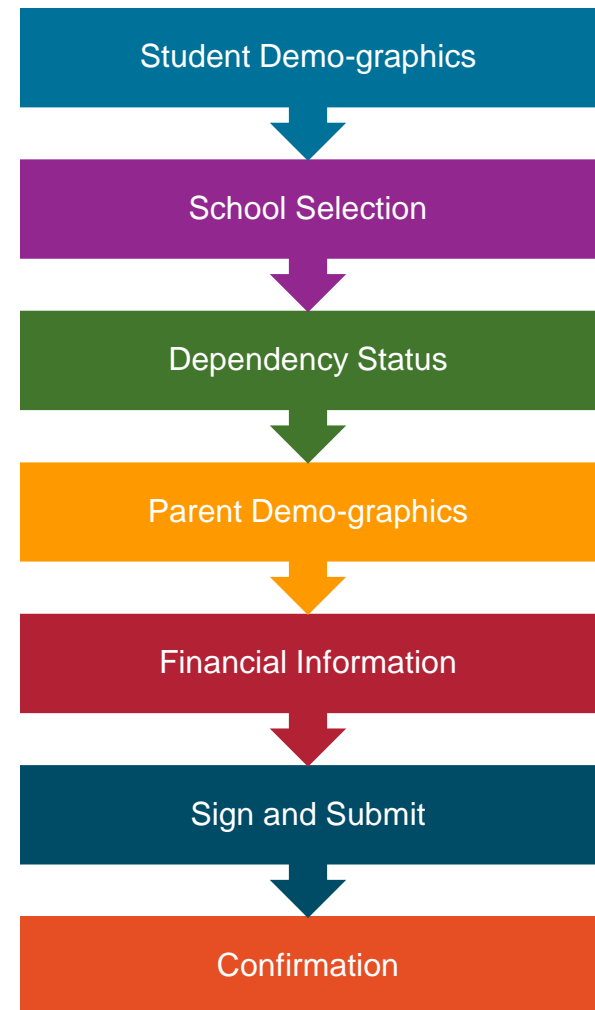
**Email Addresses**



**Student & Parent  
Federal Student Aid  
Account (FSA ID)**

# FAFSA Steps

1. Login – student or parent
2. Disclaimer – select accept
3. Application year
4. Save key
5. Introduction



# Create Your FSA ID Accounts

- The student applying for aid and one parent providing information on the FAFSA need to create an FSA ID at [studentaid.gov/fsa-id](https://studentaid.gov/fsa-id).
- Create prior to completing the FAFSA.
- Legal signature for student and parent.

Social Security  
Number

Username

Email Address

Password

Mobile Phone

Security Questions

Enable Two-Step  
Verification



# StudentAid.gov

9

## You Are America's Smartest Investment

Complete a FAFSA form

Sign a Master Promissory Note

Complete Entrance or Exit Counseling

Compare Repayment Plans with Loan Simulator

Log In

### Considering School

*I'm thinking about going to college or a career school.*

### In School

*I'm in the process of earning a degree or certificate.*

We're here to help you access and manage your financial aid.

If you filled out the FAFSA® form, you may have been offered grants, work-study, and loans. Before you receive a Direct Loan, you must complete counseling and sign a *Master Promissory Note* (MPN). Before you receive a TEACH Grant,

Complete the FAFSA® Form

Learn About the FAFSA® Form

How to Fill Out the FAFSA® Form

FAFSA® Deadlines

How to Renew Your FAFSA® Form

Reviewing and Correcting Your FAFSA® Form

View Your Student Aid Report (SAR)

Sign a Master Promissory Note

Complete Entrance or Exit Counseling

Compare Repayment Plans with Loan Simulator

Create Account

### Considering School

*I'm thinking about going to college or a career school.*

### In School

*I'm in the process of earning a degree or certificate.*

### Parent

*I want to help my child pay for college.*

### In Repayment

*I have loans I need to repay.*

# FAFSA Landing Page

**Federal Student Aid**  
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

FAFSA® Form ▾

Loans and Grants ▾

Loan Repayment ▾

Loan Forgiveness ▾

## Complete the FAFSA® Form

Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for financial aid for college or graduate 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](#)

# Role Selection

## 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.



# Log In

## Welcome to the FAFSA® Form

Tell us about yourself.

[Help](#)

[Exit FAFSA Form](#)

☒ I am a student and want to access the FAFSA form.



Log In to Continue

Create an FSA ID

or

Use personal identifiers to access the FAFSA form.

Log In

FSA ID Username, Email, or Mobile Phone

test595011519



[Forgot My Username](#)

Password

.....



Show Password



[Forgot My Password](#)

Log In

or

Create an Account

# Get Started

## 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](#)

# Create Save Key

## 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 ?

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

# Introduction

## Introduction - 2023–24 FAFSA® Form

Let's get started!

Review the resources below to help complete your FAFSA form.

 Expand All

How can I get help completing my FAFSA® form?



How many steps does it take to complete my FAFSA® form?



How long will it take to complete my FAFSA® form?



Can I save my FAFSA® form if I can't finish it?



What documents do I need to complete the FAFSA® form?



How do I sign the FAFSA® form?



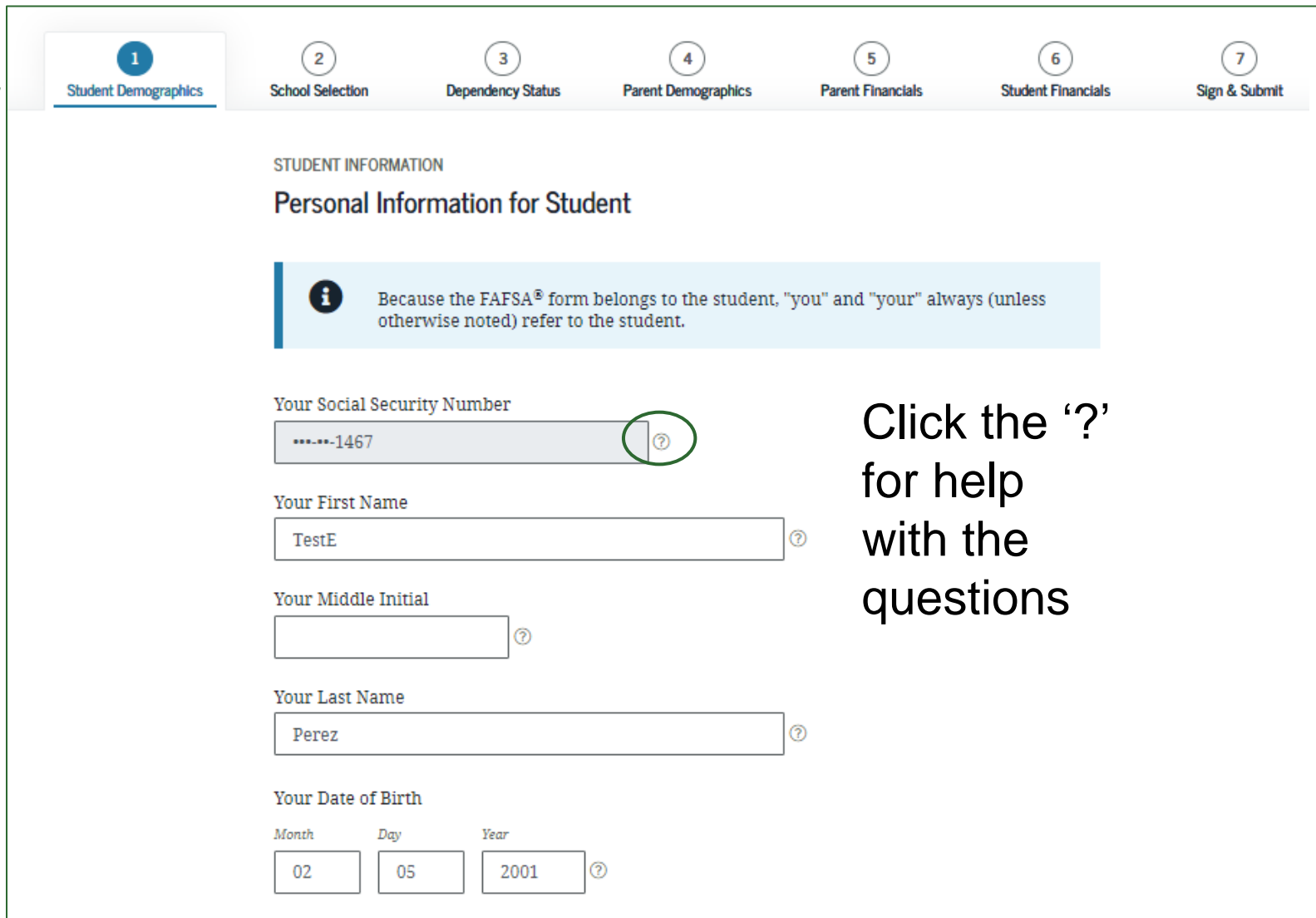
What is FAFSA web's security and privacy?



Continue

# Personal Information for Student

The navigation bar tells you where you are in the application



The screenshot shows the FAFSA application interface. At the top is a navigation bar with seven steps: 1. Student Demographics (highlighted with a blue circle and underline), 2. School Selection, 3. Dependency Status, 4. Parent Demographics, 5. Parent Financials, 6. Student Financials, and 7. Sign & Submit. Below the navigation bar is the 'STUDENT INFORMATION' section titled 'Personal Information for Student'. A light blue informational box contains an 'i' icon and the text: 'Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.' Below this are several input fields: 'Your Social Security Number' (displaying '-----1467' with a green circle around a '?' icon), 'Your First Name' (displaying 'TestE' with a '?' icon), 'Your Middle Initial' (empty with a '?' icon), 'Your Last Name' (displaying 'Perez' with a '?' icon), and 'Your Date of Birth' (with three boxes for Month, Day, and Year, displaying '02', '05', and '2001' respectively, each with a '?' icon).

1 Student Demographics

2 School Selection

3 Dependency Status

4 Parent Demographics

5 Parent Financials

6 Student Financials

7 Sign & Submit

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

-----1467 ?

Your First Name

TestE ?

Your Middle Initial

? ?

Your Last Name

Perez ?

Your Date of Birth


Month Day Year

02 05 2001 ?

Click the '?' for help with the questions



# Student Email and Phone



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

STUDENT INFORMATION

## Student Email and Phone

Your Email Address

 ⓘ

Reenter Your Email Address

 ⓘ

Your Telephone Number

 ⓘ

**Tip:** Don't use  
your high school  
email address.

Previous

Continue

# Student Address

1

Student Demographics

2

School Selection

3

Dependency Status

4

Parent Demographics

5

Parent Financials

6

Student Financials

7

Sign &amp; Submit

## STUDENT INFORMATION

### Student Address

Your Permanent Mailing Address (include apt. number)



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



Your State




Your ZIP Code

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

# Student Residency and Eligibility

## STUDENT INFORMATION

### Student Residency and Eligibility

Have you lived in Pennsylvania 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


## 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

☐ No

Are you a U.S. citizen?

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



# Student Education

## STUDENT INFORMATION

### Student Education

✓  
Student Demographics

What will your high school completion status be when you begin college in the 2023–24 school year?

High school diploma



What college degree or certificate will you be working on when you begin the 2023–24 school year?

1st bachelor's degree



Will you have your first bachelor's degree before you begin the 2023–24 school year?

☐ Yes

☒ No

What will your college grade level be when you begin the 2023–24 school year?

Never attended college/1st yr.



Are you interested in being considered for work-study?

☐ Yes

☒ No

☐ Don't know

# Student Driver's License

1

Student Demographics

2

School Selection

3

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

New Hampshire

?

*\*This is optional*

Previous

Continue

# Foster Care and Education Completed

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 ?

Previous

Continue

Select the answer that best describes your parent's (birth or adoptive) highest level of education completed

# Search for High School

  
**School Selection**

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

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

# Search for Colleges

## SCHOOL SELECTION

### College Search

### School Selection

**i** 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.

**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 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.**

**i** Complete the fields below to search for a college to add to your FAFSA® form. Need help refining your search? [Try these search tips.](#)

Search by School Name, City, State

Search by Federal School Code

State

Select

City - optional

School Name - optional

Search

- 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

## STUDENT INFORMATION

### Selected Colleges and Housing Info

✓  
School Selection

^	<b>University of Pittsburgh</b>
01	Federal School Code: 008815   Pittsburgh, PA   <a href="#">View College Info</a>
v	Housing Plan
	<input type="text" value="Select Housing Plan"/> ?  Remove

[+ Add More Schools](#)

[Compare All Schools](#)

[Previous](#)

[Continue](#)

Housing choices:

- on campus
- off campus
- with parent

# Student Marital Status

✓  
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.

i

Because the FAFSA<sup>®</sup> 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

# Does the Student Have Dependents?

✓  
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

# Student Additional Dependency Questions

SCHOOL SELECTION

## Student Additional Dependency Questions

✓  
Dependency Status

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

# Student Homelessness Question

✓ 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

---

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

# Dependent Student Status

✓ 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.

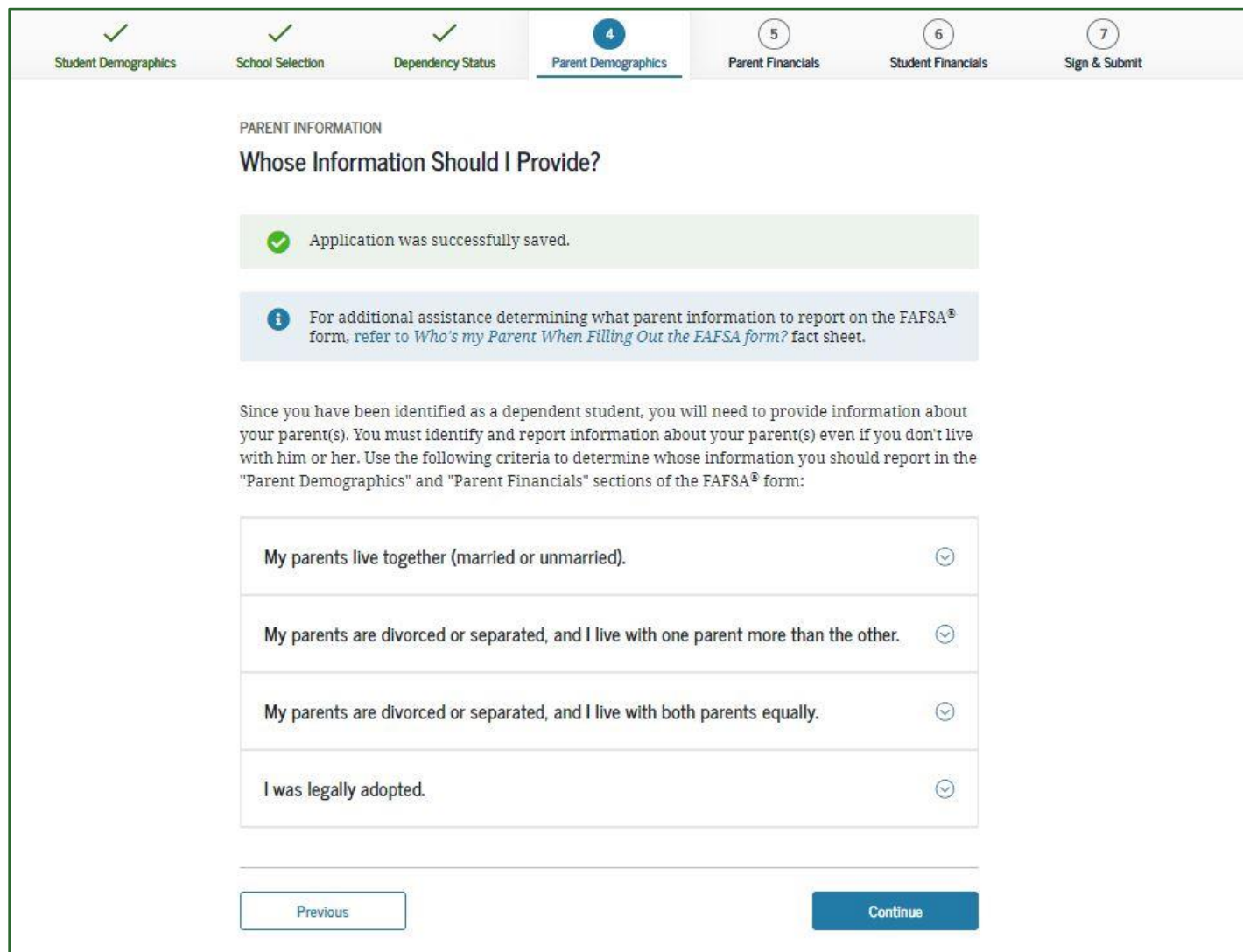
**If you have a special circumstance and are unable to provide parental information**, under very limited circumstances, you may be able to submit your FAFSA<sup>®</sup> form without parental information. Select the "I am unable to provide information about my parent(s)" option and select "Continue"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

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

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

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

# Whose Information Should I Provide?



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 (active, step 4), Parent Financials (step 5), Student Financials (step 6), and Sign & Submit (step 7). The main heading is "PARENT INFORMATION" followed by "Whose Information Should I Provide?". A green success message states "Application was successfully saved." Below this is an information icon and text: "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 text explains that dependent students must report parent information and provides criteria for determining which parent(s) to report. Four radio button options are listed: "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.", and "I was legally adopted." At the bottom are "Previous" and "Continue" buttons.

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

PARENT INFORMATION

## Whose Information Should I Provide?

✓ Application was successfully saved.

**i** 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.

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:

- ☐ 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.

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

# For Dependent Students, Who Reports Info on the 2023-24 FAFSA?

32

## 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





# Parent Marital Status

✓  
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<sup>®</sup> 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

08

Year

1994

Previous

Continue

# Personal Information for First Parent

## 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 ⓘ



Parent Demographics

*Remember which  
parent you list first*

# Parent Information for Other Parent



## Parent Demographics

### 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](#)

# Parent State of Legal Residence

## PARENT INFORMATION

### Parent State of Legal Residence

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

☐ Yes

☐ No

Previous

Continue



Parent Demographics

# Parents' Dependents

## PARENT INFORMATION

### 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, 2023 and June 30, 2024;
- or
- can answer "no" to every [dependency status](#) question on the FAFSA® form.



#### 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.



Parent Demographics

# Parent Household Information

✓  
Student Demographics

✓  
School Selection

✓  
Dependency Status

4  
Parent Demographics


5  
Parent Financials

6  
Student Financials

7  
Sign & Submit

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.

Previous

Continue

# Parent Tax Filing Status

✓  
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 >

# IRS Data Retrieval Tool

## 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



Parent Financials

## PARENT INFORMATION

### Parent Log In to IRS Data Retrieval Tool



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? ?

☒ Q. Wallace (Parent 1)

☐ Q. Walter (Parent 2)

Skip IRS DRT and Complete Manually

Continue



## 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.



Required fields \*

First Name *	Dependent
Last Name *	Data
Social Security Number *	*** - ** - ****
Date of Birth *	01 / 01 / 1994
Filing Status * ?	Single
Address – Must match your 2021 federal income tax return	
Street Address *	
P.O. Box (Required if entered on your tax return) ?	
Apt. Number (Required if entered on your tax return)	
Country *	United States
City, Town or Post Office *	
State/U.S. Territory *	Select One
ZIP Code *	

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

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.

[Return to FAFSA](#)

[Submit](#)



## 2021 Federal Income Tax Information

Jane Austin

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	

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



# Parent IRS Info

✓ 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](#)

*\*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

✓  
Student Demographics

✓  
School Selection

✓  
Dependency Status

✓  
Parent Demographics

5  
Parent Financials

6  
Student Financials

7  
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

# Parent Simplified Path Determination

## 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



Parent Financials

## 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

# Parent Additional IRS Info

✓  
Student Demographics

✓  
School Selection

✓  
Dependency Status

✓  
Parent Demographics

5  
Parent Financials

6  
Student Financials

7  
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

# Parent Questions for Tax Filers

## 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.

\$   ?

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 1040 Schedule 3—line 3.

\$   ?

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.

\$   ?

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.

\$   ?

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

\$   ?



**Parent Financials**

# Parent Additional Financial Info

✓  
Student Demographics

✓  
School Selection

✓  
Dependency Status

✓  
Parent Demographics

5  
Parent Financials

6  
Student Financials

7  
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



# Parent Untaxed Income

## PARENT INFORMATION

### Parent Untaxed Income



Parent Financials

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 ?

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



# Parent Assets



Parent Financials

## 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

# What is considered an asset?

## Report the current value at time of filing the FAFSA:

- ✓ Cash
  - ✓ Checking
  - ✓ Savings
  - ✓ Investments
  - ✓ Stocks
  - ✓ Bonds
  - ✓ Certificates of deposit (CD)
  - ✓ Bitcoin
  - ✓ Mutual funds
  - ✓ 529 Plans – for all children
  - ✓ Net value of real estate
- Farm Value – unless primary place of residence
  - Business Value – Unless family owned and employs 100 employees or less

## **Not reported on FAFSA as an asset:**

- Value of primary home
- Value of qualified retirement accounts
- Value of life insurance policies
- Value of personal property

# Student Assets

## STUDENT INFORMATION

### Student Assets

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



### Student Financials

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

# FAFSA Summary

✓  
Student Demographics

✓  
School Selection

✓  
Dependency Status

✓  
Parent Demographics


✓  
Parent Financials

✓  
Student Financials

7  
Sign & Submit

SIGN & SUBMIT

FAFSA<sup>®</sup> Summary



You're not done yet!

You still need to submit your FAFSA<sup>®</sup> form. After you print this page, select "Continue" to sign your FAFSA form.

FAFSA Summary: 2023–24

Student ID: .....0001 EX

# Demographic Survey

## SIGN & SUBMIT

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

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

# Agreement of Terms

✓

✓

✓

✓

✓

6

7

Student Demographics

School Selection

Dependency Status

Parent Demographics

Parent Financials

Student Financials

Sign & Submit

SIGN & SUBMIT

Read Before Proceeding

✓

Application was successfully saved.

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.

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, TestE Perez, agree to the terms outlined above.

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

# Student and Parent Signature

SIGN &amp; SUBMIT

## Signature Status

**i** 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

SIGN &amp; SUBMIT

## Which parent are you?



### Parent 1

Unsigned

Last Name

Walter

Date of Birth

12/11/1970

Social Security Number

.....7890

Provide Parent Signature



### Parent 2

Unsigned

Last Name

Brown

Date of Birth

11/30/1980

Social Security Number

.....8463

Provide Parent Signature

Previous



# Confirmation Page & Link to the PA State Grant Form

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 An official website of the United States government.

[Help Center](#)

[Submit a Complaint](#)

[English](#) | [Español](#)

**FederalStudentAid**  
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

[FAFSA® Form](#) ▾

[Loans and Grants](#) ▾

[Loan Repayment](#) ▾

[Loan Forgiveness](#) ▾



Nikki ▾



[FAFSA Home](#)

[Exit FAFSA Form](#)

[Help](#)

## Congratulations, Nikki!

Your FAFSA form was successfully submitted to Federal Student Aid.

08/25/2022 08:17:14

**Confirmation Number:** F 19200007906

**Data Release Number (DRN):** 7339

### 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

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

[Apply Now](#)



# PA State Grant Form



American Education Services

## Pennsylvania State Grant Form 2023-24

### 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](https://pa529.com).
- **Adobe Reader** is required to view and print your PA State Grant Form. The plug-in is available as a [free download](#) from Adobe.

CONTINUE »

## Pennsylvania State Grant Form 2023-24

1 PROVIDE INFORMATION

2

3

All fields marked with \* are required.

### Student Information

This information is associated with your grant profile.

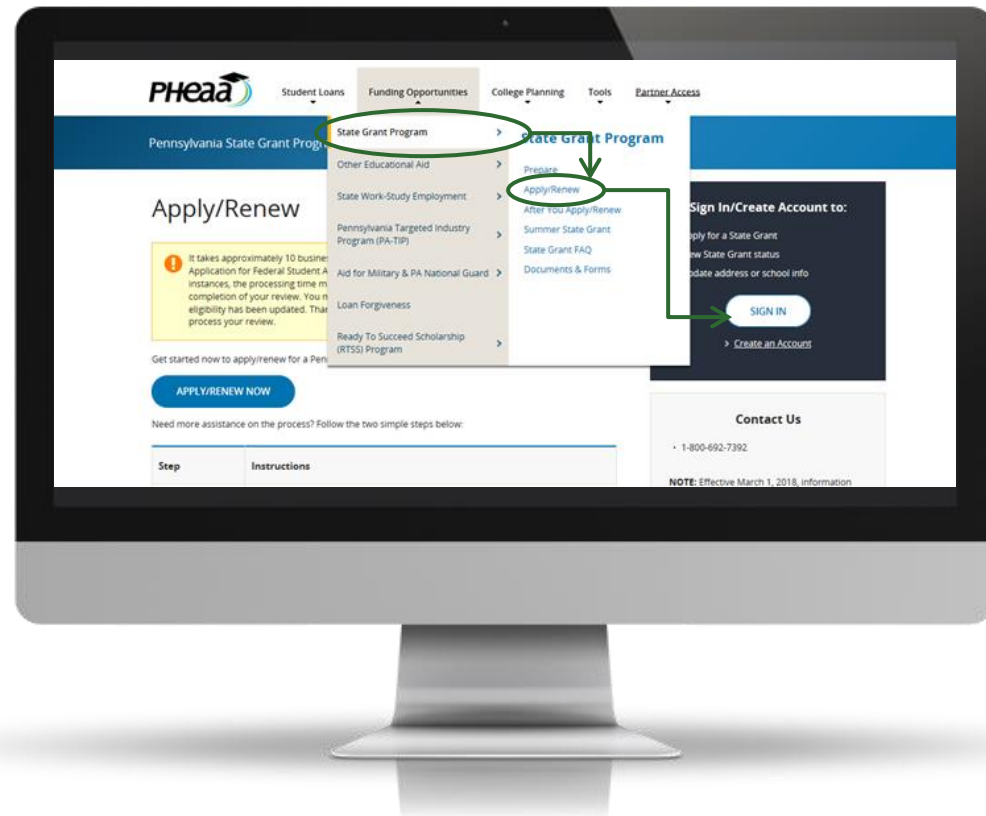
Legal Name [Some of my information is incorrect ?](#)

Your Legal Name: **Nikki smith**

# PHEAA Account Access

Create an account to:

- Check your PA State Grant eligibility
- Update your school of choice listed on the PA State Grant Form
- Complete State Grant Form, if you missed the link at the end of the FAFSA



# Special Circumstances

## If things change....

- Divorced or separated parents
- Stepparents
- Adoptive parents
- Foster parents
- Legal guardians
- Living with others
- Recent death or disability
- Reduced income

# CSSProfile.CollegeBoard.org

- Required at **Some** Institutions to Award Need Based & Institutional Aid
- Used in Addition to the FAFSA, not a Replacement
- CSS Profile Costs \$25.00 + \$16.00 for Additional Schools

**Domestic undergraduate students may submit CSS Profile for free if:**



The student is eligible for an SAT fee waiver

OR



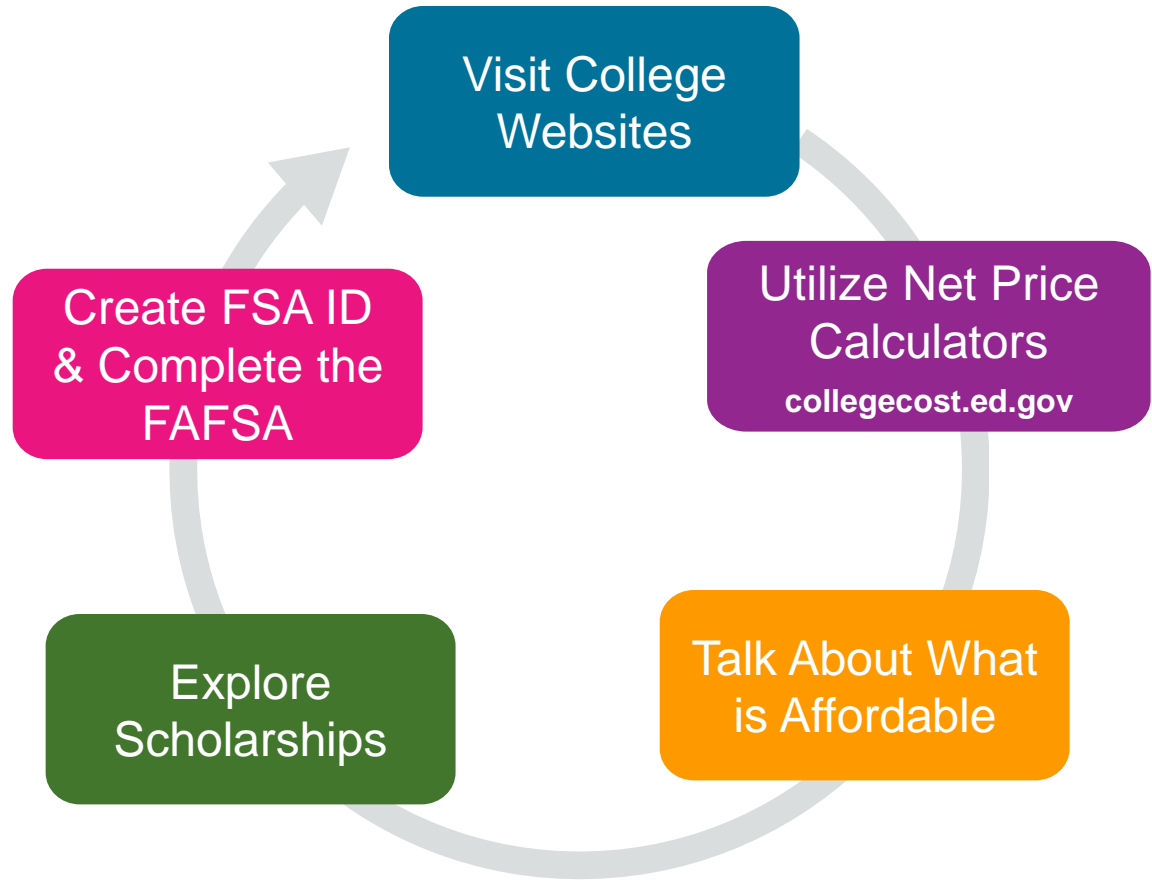
Family adjusted gross income is \$100,000 or less

OR



Student is an orphan or ward of the court under the age of 24

# What Can You Do Now?



# Important Resources

- [PHEAA.org](https://phea.org)
- [StudentAid.gov](https://studentaid.gov)
- [CollegeCost.ed.gov](https://collegecost.ed.gov)
- [EducationPlanner.org](https://educationplanner.org)
- [MySmartBorrowing.org](https://mysmartborrowing.org)

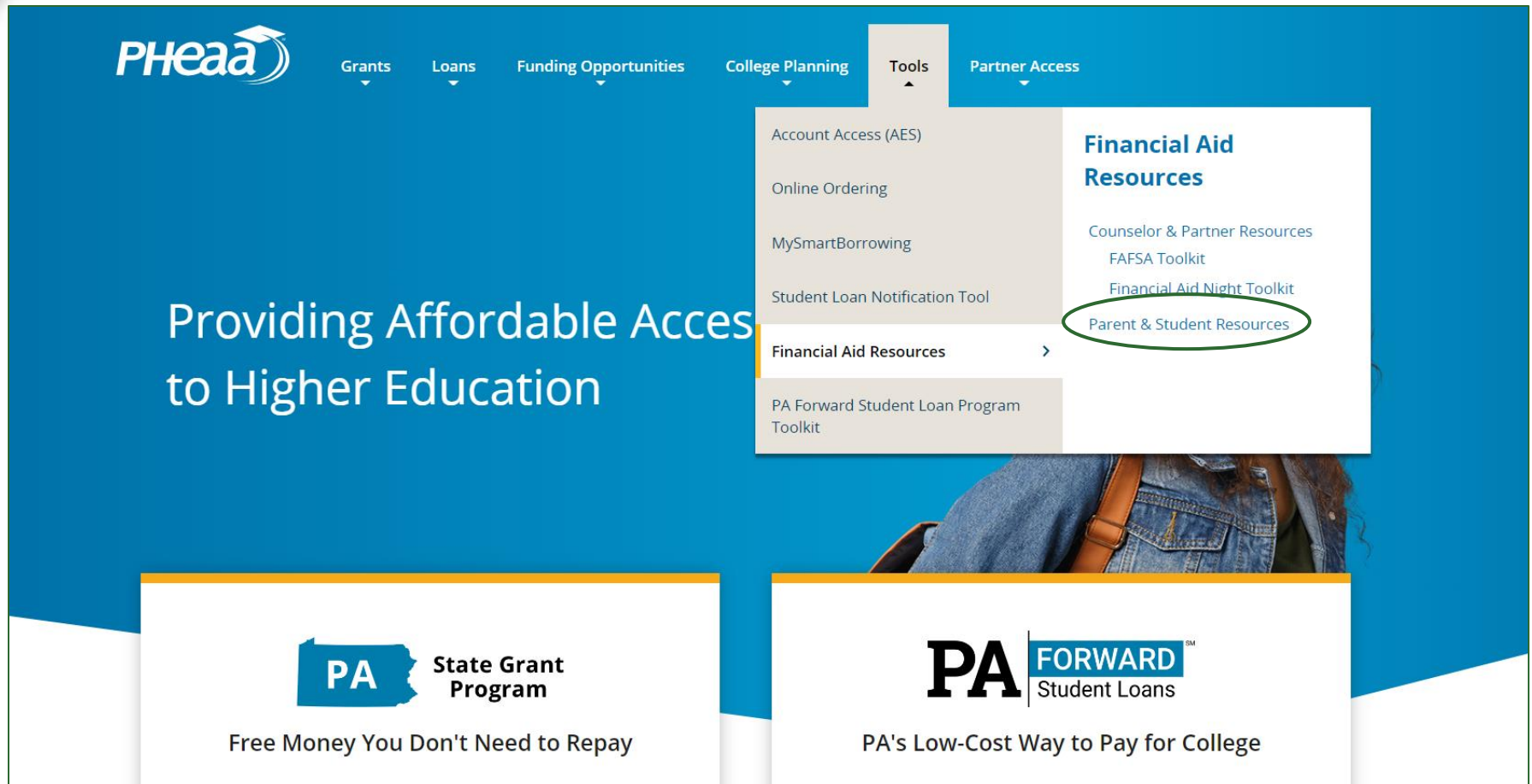
## Scholarship Sites

- [Collegeboard.org](https://collegeboard.org)
- [Fastweb.com](https://fastweb.com)
- [Finaid.org](https://finaid.org)
- [Scholarshipamerica.org](https://scholarshipamerica.org)





# PHEAA.org/ResourcesStudents



The screenshot shows the PHEAA website interface. The top navigation bar includes the PHEAA logo and links for Grants, Loans, Funding Opportunities, College Planning, Tools, and Partner Access. The 'Tools' dropdown menu is open, displaying a list of resources. The 'Financial Aid Resources' link is highlighted with a green circle. Below the main navigation, the text 'Providing Affordable Access to Higher Education' is displayed. At the bottom, there are two promotional banners: one for the PA State Grant Program and another for PA Forward Student Loans.

**PHEAA**

Grants Loans Funding Opportunities College Planning **Tools** Partner Access

- Account Access (AES)
- Online Ordering
- MySmartBorrowing
- Student Loan Notification Tool
- Financial Aid Resources** >
- PA Forward Student Loan Program Toolkit

**Financial Aid Resources**

- Counselor & Partner Resources
- FAFSA Toolkit
- Financial Aid Night Toolkit
- Parent & Student Resources**

Providing Affordable Access to Higher Education

**PA** State Grant Program  
Free Money You Don't Need to Repay

**PA** **FORWARD** Student Loans  
PA's Low-Cost Way to Pay for College



# Social Media Outreach



**PHEAA**  
**American Education Services**

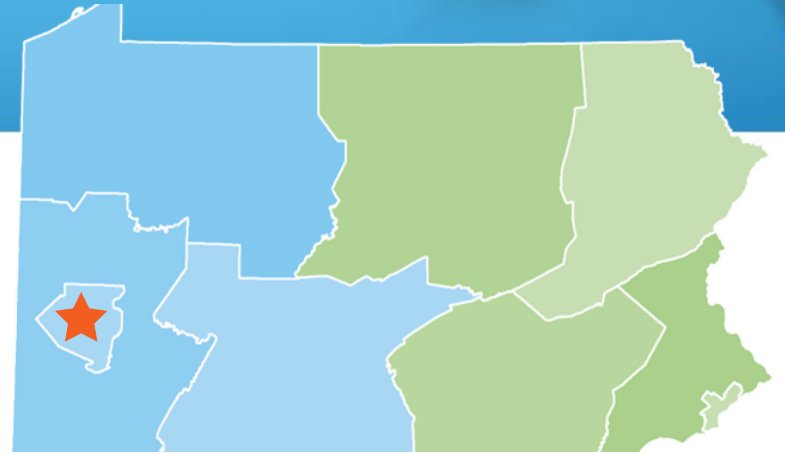


**@PHEAAaid**  
**@aesSuccessorg**



**PHEAA**

# Your Presenter



**Amy Sawdey**

Higher Education Access Partner

Allegheny County

PA Higher Education Assistance Agency (PHEAA)

717-433-3847

[Amy.Sawdey@pheaa.org](mailto:Amy.Sawdey@pheaa.org)

**QUESTIONS?**