



2023-24 FAFSA & WASFA

Today's Presenters



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TIPS FOR A SUCCESSFUL WEBINAR

1. You are not required to be on camera; but please be active on the chatbox and Q&A
2. Don't be afraid to ask questions if financial aid is confusing!
3. Pay attention to the orange bubble



Objectives



1. Identify which financial aid form to complete
2. Know what documents you will need
3. Review FAFSA and WASFA
4. Learn how to address special circumstances
5. Prepare for next steps

1. Identify which financial aid form to complete

FAFSA	OR	WASFA
<ul style="list-style-type: none"> • U.S. Citizens • U.S. Nationals (American Samoa or Swains Islands) • U.S. Permanent Residents • I-94 Holders : Refugee, Asylum granted, Cuban-Haitian Entrant, Conditional entrant, Parolee • Visa Holders under VAWA • T or T-1 Visa Holders <p>****</p> <p>Applies for federal and state aid</p>		<ul style="list-style-type: none"> • Undocumented students • Students with DACA (expired or not) • Other non-citizens** (check w/ individual college/university) • Defaulted/balance on federal loans/grants • Students who don't feel comfortable completing the FAFSA • Other reasons <p>****</p> <p>Applies for state aid</p>

Must meet SB 5194* requirements for in-state tuition & in-state financial aid

EXITS FOR **FINANCIAL AID**

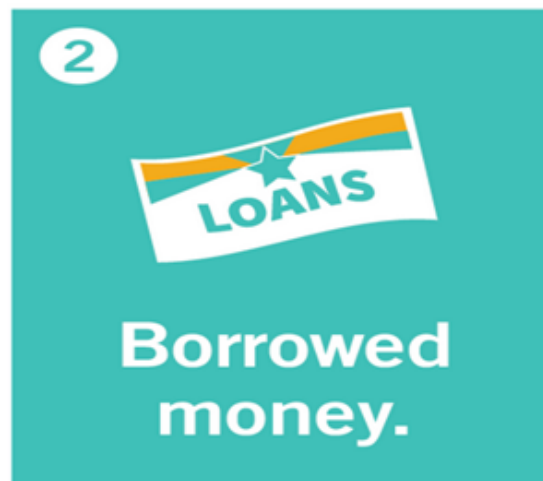
Federal
Student
Aid
U.S. DEPARTMENT OF EDUCATION



Types of financial aid



Grants and scholarships are usually based on financial need and don't have to be repaid.



Loans are an investment in your future...if you borrow only what you need. Remember, they must be paid back with interest.



A work-study job allows you to earn money while you are in school

2. Know what documents you will need: **Dependency Status**

If answered "No" to all questions:
DEPENDENT STUDENT

PARENT(S) INFO REQUIRED

- Born before 1/1/2000?
- Enrolled in graduate program?
- Married?
- With dependents?
- Actively serving in the U.S. armed forces (other than training)?

If answered "Yes" to any questions:
INDEPENDENT STUDENT

NO PARENT(S) INFO REQUIRED

- Deceased, incarcerated parents or in foster care since age 13?
- Emancipated or in legal guardianship (court intervention)?
- Unaccompanied youth?
- At risk or effectively experiencing homelessness?

Check
your
answers!

2. Know what documents you will need

Refer to
handout



You will need to compile these documents for the student AND parent(s), if student is dependent.

Tip:

- Report tax and benefits information from **2021**
- Report account balances as of the day you complete application

3. Review FAFSA/WASFA: FSA ID/WASFA Account

FAFSA - <https://fsaid.ed.gov>



Who needs an FSA ID?

- Student
- One parent if :
 - The student is a dependent student ; and if,
 - The parent has a social security number

What number should the student/parent(s) use?

- Use your SSN
- If parent doesn't have SSN, **do not get an FSA ID**

Tips:

- Parent and student need **different** email addresses and phone numbers
- If multiple children or parent is a student, parents can **use same FSA ID/WASFA Account**
- Make sure **ALL information matches and it is correct!**

WASFA - <https://wsac.wa.gov/wasfa>



Who needs an Account?

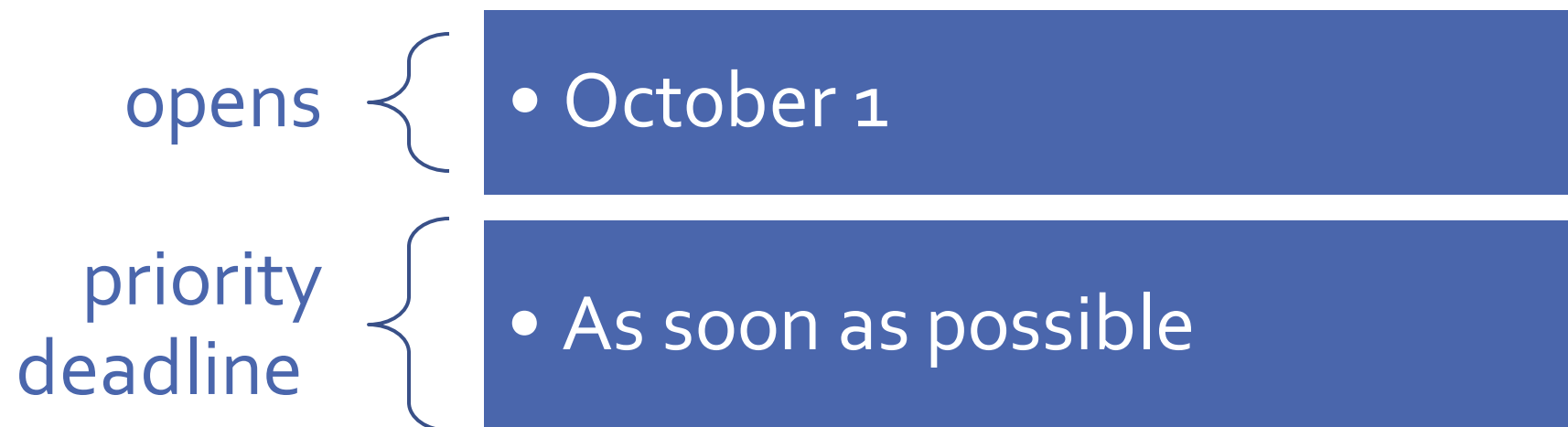
- Student
- One parent if :
 - The student is a dependent student

What number should the student/parent(s) use?

- Use SSN, DACA, or ITIN, if you have one. If you don't, leave blank.



3. Review FAFSA/WASFA: **VIP Dates**



Tips:

- **Do not sacrifice** accuracy to meet a deadline!
- Make sure to check **each school's** financial aid office individual deadline.
- If going out of state, check that state's FAFSA deadline

3. Review FAFSA/WASFA:Landing Pages

FAFSA

<https://fafsa.ed.gov>

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

FederalStudentAid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

UNDERSTAND AID ▾ APPLY FOR AID ▾ COMPLETE AID PROCESS ▾ MANAGE LOANS ▾

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](#)

FAFSA® Announcements

Changes to Your Family's Financial Situation

If your or your family's financial situation has changed significantly from what is reflected on your federal income tax return (for example, if you've lost a job or otherwise experienced a drop in income), you may be eligible to have your financial aid adjusted. Complete the FAFSA questions as instructed on the application (including the transfer of tax return and income information), submit your FAFSA form, then contact the school you plan to attend to discuss how your current financial situation has changed. Note that the school's decision is final and cannot be appealed to the U.S. Department of Education. Visit [StudentAid.gov/coronavirus](https://studentaid.gov/coronavirus) for more information.

WASFA

<https://wsac.wa.gov/wasfa>

New User

- Complete a WASFA for the first time
- Eligibility questionnaire

NEW USER
Learn More & Start a New WASFA

Returning User

- Make a correction/Add a school
- Submit an application for a new year

RETURNING USER
Info & Log-In

3. Review FAFSA/WASFA: Select the correct year



FAFSA

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

Start 2022-23 FAFSA Form

WASFA

Washington Application for State Financial Aid (WASFA)

STEP 1:

Start WASFA

Start the WASFA application process.

STEP 2:

Select Schools

Select the schools that you want to receive a copy of your WASFA.

STEP 3:

Sign WASFA

Sign your WASFA.

Select the action to the right of the WASFA application, in the table below, to process your WASFA for each available academic year. You will be provided a list of schools that will receive your WASFA and must electronically sign the document to complete the process. Dependent students will be instructed to invite a parent to sign their WASFA before the application will be submitted. You may make changes at any time by selecting the action for starting and completing an application.

- Start, edit or complete an application.
- Invite a parent to sign an application.
- Sign an application.
- View an application.
- Download an application.

Document Name	Status	Actions
2019-2020 WA Application for State Financial Aid (WASFA)	Not Started	
2020-2021 WA Application for State Financial Aid (WASFA)	Not Started	

Why is this important? Because if you apply for the wrong year, you won't receive financial aid!

3. Review FAFSA/WASFA: Sections

FAFSA

WASFA

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

-**-*

Your First Name

Maria

Your Middle Initial

E

Your Last Name

Rebecchi

Your Date of Birth

Washington Application for State Financial Aid (WASFA)

2022-2023 Washington Application for State Financial Aid

STUDENT DEMOGRAPHICS

1 2 3 4

Save and Exit

Exit

Save and Continue

Complete

Personal Information

★ - Required Field ? - Help and Hints ! - Error Information

Provide your first name, middle initial and last name exactly as it appears on your Social Security, DACA, or ITIN Card. If you don't have a Social Security, DACA, or ITIN Card, your first/last name should match the name you provided to your college(s).

First Name ★

ELVIRA

Middle Initial

Last Name ★

REBECCHI

Gender (Male, Female, or X)

Female ▼

Indicate whether you are male, female, or X.

Student Demographics Washington State Information Educational Plans Dependency Determination Student Income & Tax Data School List

Not Started In Progress Completed

3. Review WASFA: State Residency

Washington Application for State Financial Aid (WASFA)

2022-2023 Washington Application for State Financial Aid



Residency information:

1. High school diploma or equivalent doesn't need to be earned in WA state
2. The law now requires that a person must live in Washington for one year, or 12 consecutive months, prior to starting college.

WASHINGTON STATE INFORMATION

Back Save and Exit Exit Save and Continue Complete

Residency Information

★ - Required Field ? - Help and Hints ! - Error Information

Please answer the following questions related to your residency status.

Student's State of Residence

WASHINGTON

? Provide the state where you reside.

Did you become a resident of the state before 01/01/2017?

☐ Yes ☒ No

? Indicate if you became a resident of this state before January 1, 2017.

WA State Higher Education Residency Affidavit

Students must be residents to qualify for Washington in-state tuition rates at public institutions and meet residency requirements for state financial aid programs at participating schools. The Residency Affidavit is one way to show you are a resident. The affidavit is a promise between you and the institution determining residency. To be able to certify this affidavit, you must meet the following eligibility requirements:

- Earn a high school diploma, GED, or diploma equivalent before your first term at the college determining residency.
- Maintain a primary residence in Washington for at least 12 consecutive months immediately before your first term at the college determining residency, and
- Promise that one of the following is true:
 - You will file an application to become a permanent resident of the United States as soon as you are eligible to apply. And, that you are also willing to engage in activities designed to prepare you for citizenship, including citizenship or civics review courses, or
 - You are a U.S. citizen, U.S. national, or U.S. permanent resident.

Please choose one of the following *

☐ I certify that, by the official start date of my first term at the college determining residency, I will have met the eligibility requirements above.

☐ I will not meet the eligibility requirements above by the official start date of my first term at the college determining residency. I want to learn other ways to meet residency requirements for in-state tuition and state financial aid.

Why is this important?

- It will determine your eligibility for in-state tuition and state financial aid

Choosing "I will not meet eligibility" will open questions about DACA

3. Review WASFA: DACA

Why is this important?

- It will determine your eligibility for state work-study

WASHINGTON STATE INFORMATION

Back

Save and Exit

Exit

Save and Continue

DACA Status

★ - Required Field ? - Help and Hints ! - Error Information

Do you have DACA status? ★

☒ Yes ☐ No



Select Yes if you applied for and were granted Deferred Action for Childhood Arrivals (DACA) status. Otherwise, select No.

Answer "Yes" even if it has expired

3. Review FAFSA/WASFA: Academic Plans

Select

High school diploma
GED certificate or state authorized high sch
Home schooled
None of the above

Select

1st bachelor's degree
2nd bachelor's degree
Associate degree (occupational or technical program)
Associate degree (general education/transfer program)
Certificate/diploma (occupational/technical/education program o
Certificate/diploma (occupational/technical/education program o
Teaching credential program (nondegree program)
College graduate/professional degree (MBA, M.D., Ph.D., etc.)
Other/undecided

HS Seniors: Even if you have **dual enrollment** or taken college credits (i.e.; **Running Start**), you will choose this option.

1

2

3

4

5

6

7

Student Demographics

School Selection

Dependency Status

Parent Demographics

Parent Financials

Student Financials

Sign & Submit

STUDENT INFORMATION

Student Education

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

Previous

Continue

Why is this important? Because program and year in college affect type and amount of aid you can receive.

Select

Never attended college/1st yr.
Attended college before/1st yr.
2nd yr./sophomore
3rd yr./junior
4th yr./senior
5th yr./other undergraduate
1st yr. college graduate/professional (MBA, M.D., Ph.D., etc.)
Continuing graduate/professional or beyond (MBA, M.D., Ph.D., etc.)

3. Review FAFSA/WASFA: School Selection

FAFSA

✓ **2** 3
Student Demographics **School Selection** Dependency Status Parent Information

STUDENT INFORMATION
Selected Colleges and Housing Plans

01 Columbia Basin College
Federal School Code: 003774 | Pasco, WA |
[View College Info](#)

Housing Plan
Select Housing Plan ? Remove

Select Housing Plan
On Campus
With Parent
Off Campus

+ Add More Schools

Compare All Schools

Why is this important?
Housing choice affects your overall budget (or cost of attendance) which in turn can affect how much aid you receive.

WASFA

Select the schools to receive a copy of your WASFA, along with your housing plans for that school. Select at least one school and up to ten schools to receive your information.

* - Required Field ? - Help and Hints ! - Error Information

School 1 *
University of Washington

Housing Plan for School 1 *
On Campus ?
Please indicate where you plan to live while in school.

School 2
Renton Technical College

Housing Plan for School 2 *
Off Campus or Other ?
Please indicate where you plan to live while in school.

School 3
Edmonds Community College

Housing Plan for School 3 *
With Parents ?
Please indicate where you plan to live while in school.

School 4
Select

If you want to live on campus, or don't know what your housing plan will be yet, select "On Campus"

Tip: Select up to 10 schools. Give yourself options and backup plans!

3. Review FAFSA/WASFA: Whose information should you report?



BIOLOGICAL OR ADOPTIVE PARENTS ONLY

(& stepparent IF married to biological parent)



Grandparents, foster parents, legal guardians, older brothers or sisters, and aunts and uncles are not considered parents unless they have legally adopted the student.

3. Review FAFSA/WASFA: Parent Scenarios

Scenario	You will select the following answer:	Heads up
Able to provide parent(s) information	<input type="checkbox"/> "I will provide parent information"	No follow up required

3. Review FAFSA/WASFA: Parent Scenarios

Scenario	You will select the following answer:	Heads up
Unable to provide parent(s) information	<input type="checkbox"/> "I am unable to provide parent(s) information" <input type="checkbox"/> "I have a special circumstances and I am unable to provide parent(s) information" <input type="checkbox"/> "I understand I must follow up with the financial aid administrator after I submit the FAFSA."	- No EFC calculated - Follow up with the financial aid office; supporting documentation required

- The following are examples of some special circumstances where you may submit your application without providing parental information:
 - Your parents are incarcerated; or
 - You have left home due to an abusive family environment; or
 - You do not know where your parents are and are unable to contact them (and you have not been adopted).

3. Review FAFSA/WASFA: Parent Scenarios

Scenario	You will select the following answer:	Heads up
Unwilling to provide parent(s) information	<input type="checkbox"/> "I am unable to provide parent(s) information" <input type="checkbox"/> "I do not have a special circumstance, but I am unable to provide information about my parent(s)"	- Very limited funding available - Some financial aid offices may consider an appeal if stepparent refuses to provide information.

- Not all situations are considered a special circumstance. The following are situations that would not be considered a special circumstance:
 - You do not live with your parents;
 - Your parents don't provide you with financial support;
 - Your parents refuse to contribute to your college expenses;
 - Your parents don't claim you as a dependent on their income tax return;
 - Your parents do not want to provide their information on your application.

3. Review FAFSA/WASFA: Parent Section

FAFSA

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.	⌵

Tip1 : Marital status AS OF THE DATE FAFSA/WASFA is completed

WASFA

PARENT INFORMATION

Back

Save and Exit

Exit

Save and Continue

"Parent" refers to a biological or adoptive parent. Grandparents, foster parents, legal guardians, older siblings, and uncles or aunts are not considered parents unless they have legally adopted you. In case of divorce or separation, give information about the parent you lived with most in the last 12 months. If you did not live with one parent more than the other, give information about the parent who provided you the most financial support during the last 12 months or during the most recent year you received support. If your divorced or widowed parent has remarried, also provide information about your stepparent.

Parents' Family Information

* - Required Field ? - Help and Hints ! - Error Information

Please provide the following information about your parents.

Parents' Marital Status *

Never Married

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

Parents' Marital Status *

Select

As of today, select the marital status of your parent.

Select

- Never Married
- Unmarried and Both Parents Living Together
- Married or Remarried
- Divorced or Separated
- Widowed

Check
your
answers!

Tip2: Don't try to guess!

3. Review FAFSA/WASFA: Parent(s) w/ no SSN

FAFSA

PARENT INFORMATION

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

Your Parent's Social Security Number

000-00-0000

HIDE SSN



Your Parent's Last Name



Your Parent's First Initial



Your Parent's Date of Birth

Month Day Year



Your Parents' Email Address



WASFA

Parent 1 Information

* - Required Field ? - Help and Hints ! - Error Information

Please provide the following information about your father/mother/stepparent.

Parent 1 SSN *

000-00-0000

Indicate your father's/mother's/stepparent's Social Security Number. If your parent does not have a Social Security Number, please enter all zeros (000000000). No dashes are necessary.

Parent 1 Last Name *

Jane

Indicate your father's/mother's/stepparent's last name.

Parent 1 First Name *

Smith

Indicate your father's/mother's/stepparent's first name.

Parent 1 Date of Birth *

Check
your
answers!

Tip 1: Parent/s **do not need** a Social Security number for their student to apply for financial aid

Tip 2: Use all zeroes (do not use ITIN)

3. Review FAFSA/WASFA: Whose taxes to use?

- If parents are **living together**, report both parents' information
- If parents are **not living together**, report information about parent identified below
- If parents are **divorced and remarried**, report information about parent identified below and stepparent.
 - Parent(s) with whom student **LIVES with more than HALF of the time**; If equal time, then...
 - Parent who provides **more than HALF of student's financial support**.


Tip:

It doesn't matter who claims student on taxes. Number of parents and marital status have to match.

3. Review FAFSA/WASFA: Who lives at home?

FAFSA

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, 2021 and June 30, 2022;
- 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, 2021 and June 30, 2022.

WASFA

Parents' Household Number of Family Members *

4


 Indicate the number of people in your parents' household. You should include:

- Yourself, even if you don't live with your parents.
- Your parents.
- Your parents' other children (even if they do not live with your parents) if (a) your parents will provide more than half of their support between July 1, 2019 and June 30, 2020, or (b) the children were considered dependent students by the Department of Education standards (they must be able to answer "No" to every question in Dependency Determination section of this process), and
- Other people if they now live with your parents and your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2019 and June 30, 2020.

Note: Do not include siblings who are in U.S. military service academies.

Parents' Household Number in College *

3

 Indicate the number of people in your legal parents' household who will be college students between July 1, 2019 and June 30, 2020. Always count yourself as a college student. Do not include your parents. You may include others only if they will attend a college, university, institution, or technical school, at least half-time in 2019-2020, for a program that leads to a college degree or certificate.



May include unborn child



Live-in significant other unless receiving 50% of financial support



Cannot include parents in number attending college

Check your answers!

3. Review FAFSA/WASFA: Household information

Federal benefits

- ☐ Medicaid or Supplemental Security Income (SSI)
- ☐ Supplemental Nutrition Assistance (SNAP)
- ☐ Free or Reduced-Price School Lunch
- ☐ Temporary Assistance for Needy Families (TANF)
- ☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

3. Review FAFSA/WASFA

How to enter financial information



Family files taxes and it
is eligible to use IRS
Data Retrieval tool

Transferred
electronically on
FAFSA



Family files taxes but it
is NOT eligible to use
IRS Data Retrieval tool

Manually enter information on FAFSA or WASFA



Family doesn't file taxes

3. Review FAFSA: IRS Data Retrieval Tool



WHO CAN USE IT?

- Must have valid Social Security Number
- Must have filed 2020 federal tax returns; no amendments.
- No change to marital status since 12/31/2020
- Must have filed as single or married filing jointly

3. Review FAFSA: IRS Data Retrieval Tool



WHO CAN'T USE IT?

- Those married filing separately
- Those married filing as head of household
- Those unmarried and living together
- Filed using ITIN
- Foreign tax returns
- Victims of identity theft

3. Review FAFSA: IRS Data Retrieval Tool



IRS Data Retrieval Tool

Based on your responses, your parents are not eligible to transfer his or her information from the IRS into this FAFSA® form.


Select "Continue."



RECOMMENDED

IRS Data Retrieval Tool

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

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

3. Review FAFSA: IRS Data Retrieval Tool

Parent Eligible for IRS DRT

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

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](#)

Link to IRS

Return to FAFSA | Help | Logout | Español

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!

THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

[OK](#)

Parent Log In to IRS Data Retrieval Tool

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

PARENT INFORMATION

Parent Log In to IRS Data Retrieval Tool

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

Provide parent FSA ID credentials.

Which parent are you? ⓘ

☒ Q. Wallace (Parent 1)

☐ Q. Walber (Parent 2)

[Skip IRS DRT and Complete Manually](#) [Continue](#)

Look up tax data

Return to FAFSA | Help | Logout | Español

2021 Federal Income Tax Information

Dependent Data43

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

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

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

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

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

Transfer My Tax Information into the FAFSA Form ⓘ

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

☒ [TRANSFER NOW ⓘ](#)

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

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

☐ [DO NOT TRANSFER ⓘ](#)

Transfer to FAFSA

3. Review FAFSA: Data Transfer



You have successfully transferred your 2021 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA® form. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA form.

Transferred tax information **will not be viewable** on FAFSA or SAR.

What was your adjusted gross income for 2021?

Transferred from the IRS

3. Review FAFSA/WASFA: Manually Entering Data

WASFA

Parents' AGI from Income Tax Return *

? Indicate the adjusted gross income shown on your parents' income tax return. Adjusted gross income is shown on IRS Form 1040-line 7.

Parents' Taxes Paid from Income Tax Return *

? Indicate the total amount of income taxes paid by your parents. The paid income tax amount is shown on IRS Form 1040-line 13 minus Schedule 2-line 46. If negative, enter a zero here.

What was your parents' adjusted gross income for 2021?

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

\$	25,000	.00	?
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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	?
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FAFSA

3. Review FAFSA/WASFA: Additional \$\$ Information

- Cash, checking, saving, stocks, bonds, UGMA and UTMA (if you are the owner) **balances** as of the day you fill out the form. **Amounts.**
- **Benefits** such as Medicaid or Supplemental Security Income (SSI) benefits; Supplemental Nutrition Assistance Program (SNAP); Free or Reduced-Price School Lunch (FRL); Temporary Assistance for Needy Families (TANF); 5) Special Supplemental Nutrition Program for Women, Infants and Children (WIC) benefits. **YES/NO answer**
- **Untaxed income** such as child support received, non-educational veteran benefits, refugee assistance, etc. **Do not include** foster care or adoption assistance payments, EIC, student aid, child tax credit, welfare, untaxed SS/SSI. **Amounts.**
- **Investments** (net worth amount):
 - **Farm** - If you don't live in it, report net worth of land, buildings, machinery, equipment, inventory, etc.
 - **Business:** Include net worth if family owns/controls less than 50% and has 100 or more full-time staff.
 - **Properties** - If you don't live in it, report net worth.

Exclusion of CARES Act emergency aid: Any CARES Act emergency aid you received this year does NOT need to be included. This guidance also applies to institutional emergency aid awarded as a result of COVID-19 expenses.



3. Review FAFSA/WASFA: College Saving Plans

Owner	Report as	Treatment of Qualified Distribution
Dependent Student	Parent asset (balance)	Not reportable
Parent of Dep Student	Parent asset** (balance)	Not reportable
Independent student	Student asset (balance)	Not reportable
Another family member or third party	Ignored	Report as untaxed income to the beneficiary*

*Report the year after it was distributed; if used for non-qualified expenses, report under adjusted gross income

**Parents with multiple college savings plans must report ALL balances (i.e.; multiple children) every year, for every child.

3. Review FAFSA

NEW Demographic survey

SIGN & SUBMIT

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

i 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](#)

3. Review FAFSA Signatures

Signature Options

Student signature for: Perez

Date of Birth Social Security Number
02/05/2001 -----1467

Other Options to Sign and Submit

We recommend signing electronically with an FSA ID so you don't have to print and mail a signature page or return later to sign your FAFSA form. If you are unable to sign electronically, select another option:

☐

Sign electronically with my FSA ID

This is the fastest option. Selecting this option will return you to the "What is your (the student's) FSA ID?" question.

☐

Print a signature page

This option requires that you print and mail your signature page.

☒

Submit without signatures

This option allows you to submit your FAFSA form now without your signature, but you will need to return later to sign.

Continue

[Return to Signature Status](#)

In case:

- Parent does not have a SSN
- Unable to resolve name, SSN, date of birth mismatch (so FSA ID doesn't work)
- Forgot login credentials and unable to recover account

Tips:

- Don't forget to mail it to the address provided in form itself.
- Keep a copy for your records.


3. Review FAFSA Signatures

SIGN & 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 Selected Signature Option




Last Name
Perez


Date of Birth Social Security Number
02/05/2001 -----5141

Choose another way to sign.




Parent Signature Needed



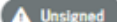
[Provide Parent Signature](#) 

SIGN & SUBMIT

Signature Status




Student Selected Signature Option



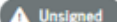
Last Name
Perez

Date of Birth Social Security Number
02/05/2001 -----1519

Choose another way to sign.



Parent Selected Signature Option



Last Name
Walter

Date of Birth Social Security Number
12/11/1970 -----7890

Choose another way to sign.

[Sign as a Different Parent](#)

[Previous](#)

[Submit My FAFSA Form Now](#)

3. Review FAFSA Application status

My FAFSA®

[? Help](#)

[↪ Exit FAFSA Form](#)

STUDENT INFORMATION

Welcome to INDEPENDENT TESTER's application!

2023-24

2022-23

Current Application Status:

✔ Processed Successfully

Congratulations, your FAFSA form was successfully processed.

What Happens Next

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

Original Application: Submitted on 10/01/2022; Processed on 10/18/2022

3. Review FAFSA Student Aid Report

2023–24 Student Aid Report

Print SAR

Processing Results →

TRANSACTION 01

Processing Results

FAFSA Data

School Information

Financial Aid History

Corrections History

Application Receipt Date:	Processed Date:	Data Release Number (DRN)
10/01/2022	11/03/2022	3966

[Learn about federal tax benefits for education, including the American Opportunity tax credit.](#)

Expected Family Contribution: 0

Based on the information we have on record for you, your Expected Family Contribution (EFC) is 0. You may be eligible to receive a Federal Pell Grant and other federal student aid. Your school will use your EFC to determine your financial aid eligibility for federal grants, loans, and work-study funds, and possible funding from your state and school.

Based on your EFC of 0, you may be eligible to receive a Federal Pell Grant of up to **\$6,895** for the 2023–24 school year provided you have not met or exceeded the lifetime limit established for the Federal Pell Grant program.

3. Review FAFSA Student Aid Report

2023–24 Student Aid Report

Print SAR

Processing Results

FAFSA Data →

School Information

Financial Aid History

Corrections History

TRANSACTION 01

FAFSA Data

Application Receipt Date:
10/01/2022

Processed Date:
11/03/2022

Data Release Number (DRN)
3966

Your FAFSA data reflects the answers you provided on your FAFSA form. Assumed values are marked with an asterisk (*).

What you must do now:

Use the checklist below to make sure that all of your issues are resolved.

- If you need to make corrections to your information, select "Make Correction" on the "My FAFSA" page using your account username and password (FSA ID). If you need additional help with your *Student Aid Report* (SAR), contact your school's financial aid office or select the "Get FAFSA help" link from the FAFSA home page. If your mailing address or email address changes, you can make the correction online.

Heads up:

Here's where you'd find information in case the student needs to make corrections or was selected for verification.

3. Review FAFSA Student Aid Report

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

PROUD SPONSOR OF
THE AMERICAN MUSEUM

STUDENT AID REPORT ACKNOWLEDGEMENT 2023-2024

HTTPS://FAFSA.GOV

NOVEMBER 23, 2023

000117C041

JOHN SMITH
742 EVERGREEN TERRACE
SPRINGFIELD OH 45555

F 211 2324

OMB No. 1845-0001

DATA RELEASE NUMBER (DRN): 2245
EXPECTED FAMILY CONTRIBUTION (EFC): 000000 C

Dear JOHN SMITH,

Your Student Aid Report (SAR) Acknowledgement summarizes the information you submitted on your 2023-2024 Free Application for Federal Student Aid (FAFSA).

Application Status (review the checked boxes)

- ☒ Your FAFSA appears to be complete. Review the data on pages 2 and 3. We may have assumed certain information to calculate your eligibility for federal student aid. We printed any assumptions we made and the word "assumed" for the items on the back of this page. If you need to make corrections, you can go to <https://fafsa.gov> and use your FSA ID to access your information or you can contact the financial aid office at one of the schools you listed on your application for assistance. The school(s) listed on your FAFSA will receive your information.

Federal Student Aid Eligibility (review the checked boxes)

The data submitted on your FAFSA is used to calculate your Expected Family Contribution (EFC), which is 000000.

The EFC is **not** the amount of money that your family must provide. Rather, you should think of the EFC as an index that colleges use to determine how much financial aid you would receive if you were to attend their school. Financial aid may include grants (free funds that do not have to be repaid), work-study (paid part-time employment), and/or low-interest loans (borrowed funds that must be repaid). This award information will vary from college to college because the cost of attending each is different. Please note that your EFC is subject to change if you update or correct your FAFSA. For more information about the EFC and other sources of aid, go to StudentAid.gov.

Heads up:

Read cover letter closely and follow any instructions.

If you see an asterisk next to your EFC, the student was selected for verification.

Encourage student to gather financial documents to submit to the financial aid office.

3. Review WASFA: Student Aid Report

2023-24 WA Application for State Financial Aid

Preview My Forms

Your responses to the previous questions have been pre-populated in the application listed below. Please select View Form to see your pre-populated application. You should review the information carefully and make any necessary changes before proceeding.

If your application is complete and accurate, and no changes are necessary, please check the acknowledgement box below and proceed to the next page.

2023-24 WA Application for State Financial Aid (WASFA)

☒ Acknowledge that all information provided on my application is true and correct.

[View Form](#)

Back Next >>

Sign My Forms

Not Started
In Progress
Completed

You MUST open and review this form before you can acknowledge that the information is true and correct. The form will open in a separate tab.

Make sure to review all answers carefully before signing and submitting.

Once you have viewed it you can close the window, check the box acknowledging your information is true and correct, then click on the Next button.

Calculated Expected Family Contribution (EFC):	87
Certifications and Signatures	
Each person signing below certifies that all of the information reported is complete and correct.	WARNING: If you purposely give false or misleading information you may have to repay any financial aid received as a result.
Print Student's Name	Student's ID Number
Electronically signed By	10/1/2019 9:28 PM
Student's Signature (Required)	Date
Electronically signed By	10/1/2019 9:39 PM
Parent's Signature (Required)	Date

3. Review WASFA: Student Signature

Electronic Signature Process

Student Certification and Electronic Signature: The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature. To certify your application, read the text below and provide an electronic signature by typing your name in the answer field. I certify or declare under penalty of perjury under the laws of the State of Washington that the foregoing information is true and correct. By typing my full legal name I provide my electronic signature.

Name on File: **MARIA REBECCHI**

First Name: *

Provide the first name used when you created your account.

Last Name: *

Provide the last name used when you created your account.

Password: *

Provide the password used to access this website.

Current City: *

Place (City and State) Where Electronic Signature Was Completed: The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature.

Current State: *

Place (City and State) Where Electronic Signature Was Completed: The Washington Student Achievement Council requires that you certify your application by submitting an electronic signature.

Important Notice: In order to complete this process a parent must electronically sign your WASFA application. After you electronically sign the application, select the parent signature invitation action and follow the instructions.

Washington Application for State Financial Aid (WASFA)

STEP 1: Start WASFA

Start the WASFA application process.

STEP 2: Select Schools

Select the schools that you want to receive a copy of your WASFA.

STEP 3: Sign WASFA

Sign your WASFA.

Select the action to the right of the WASFA application, in the table below, to process your WASFA for each available academic year. You will be provided a list of schools that will receive your WASFA and must electronically sign the document to complete the process. Dependent students will be instructed to invite a parent to sign their WASFA before the application will be submitted. You may make changes at any time by selecting the action for starting and completing an application.

Start, edit or complete an application.

Invite a parent to sign an application.

Sign an application.

View an application.

Download an application.

Document Name	Status	Actions
2022-23 WA Application for State Financial Aid (WASFA)	Not Started	
2023-24 WA Application for State Financial Aid (WASFA)	Incomplete – Parent Signature Pending	

Don't forget
to invite
your parent!

3. Review WASFA: Invite Parent to Sign

Washington Application for State Financial Aid (WASFA)

Choose parent to sign 2023-24 WA Application for State Financial Aid (WASFA).

Primary Parent's Last Name	Primary Parent's First Name	Primary Parent's Email
GARCIA	A	<input type="text" value="ENTER YOUR PARENT'S EMAIL ADDRESS"/>

☒ This parent is signing this document

Second Parent's Last Name
PEREZ

☐ This parent is signing this document

Back

Exit

Washington Application for State Financial Aid (WASFA)

Confirm parent selection

You have chosen A GARCIA (GARCIAA@GMAIL.COM) to view and sign the 2022-23 WA Application for State Financial Aid (WASFA). After you click the "Generate Portal Access and E-signature Email" button below, an email containing login instructions to the portal will be sent to your parent.

☒ I confirm and acknowledge that A GARCIA will be able to view and sign 2022-23 WA Application for State Financial Aid (WASFA).

Back

Exit

Generate Portal Access and E-signature Email

- Your parent will receive an email with a link to create their own account and to electronically sign your application. **This link expires in 72 hours.**
- If your link has expired, log back into your student account and send a new invitation.

3. Review WASFA: Parent Receives Invite

Action Required – WASFA Parent Signature Inbox x

wasfa@wsac.wa.gov

3:42 PM (13 minutes ago)

to [redacted]

Sally Jones has selected you to sign the 2022-23 Washington Application for State Financial Aid (WASFA). Your username is [redacted]@gmail.com. Please log in by going to the [Parent Portal](#) and login with your current user name and password to sign this application.

If you have any questions about your account or the signature process please contact the Washington Student Achievement Council at wasfa@wsac.wa.gov or 888-535-0747.

Washington Application for State Financial Aid (WASFA)



Sign an application.



View an application.



Download an application.

Document Name	Student Name	Status	Actions
2023-2024 WA Application for State Financial Aid (WASFA)	Sally Jones	Completed on 10/8/2018	

3. Review FAFSA/WASFA: Common Mistakes

We already covered:

- ✓ Not filing your FAFSA or WASFA...early!
- ✓ Submitting an incomplete or inaccurate application
- ✓ Errors in name, SSN, DOB
- ✓ Incorrect answers to Dependency questions
- ✓ Wrong marital status
- ✓ Errors in number of family members in household & in college
- ✓ Entering the wrong income information
- ✓ Forgetting to sign and submit the form!



Check your
answers!

4. Address Special Circumstances

ADDRESS WITHIN FORMS

Within the application:

- No social security number
- Parents' marital status and taxes

Within application AND gather documentation:

- Homelessness
- Self-supporting
- Unaccompanied minor
- Foster Youth
- Deceased parents
- Incarcerated parents
- Emancipated, legal guardianship, ward of the court


SUBMIT APPEAL TO FINAID OFFICE

Prepare dependency override

- **Unable to locate parents**
- **Staying with family members/friends**

Prepare special circumstance appeal:

- **Changes in family income**
- **Unexpected/additional expenses**



Refer to
handout

Prepare your petition using this tool:
<https://formswift.com/swift-student>

5. Prepare for Next Steps

1. Get your Student Aid Report

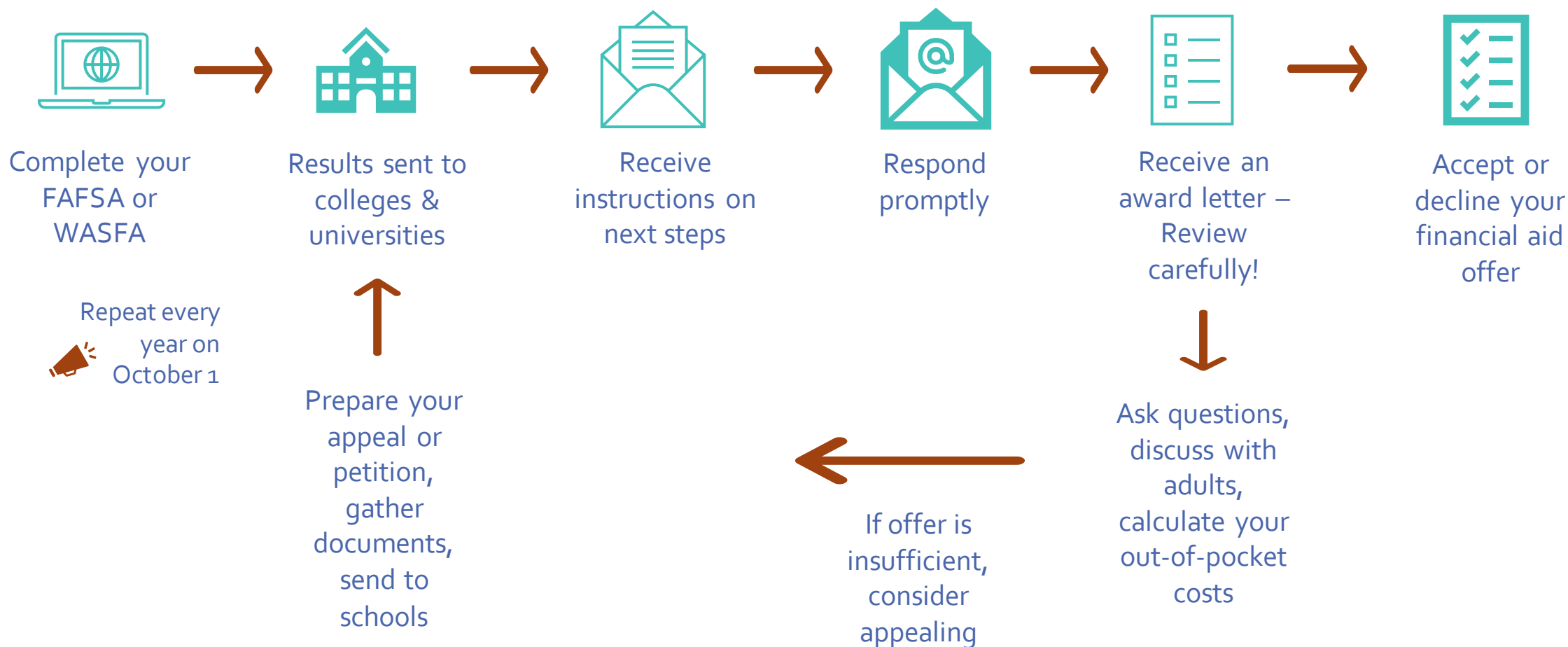
- Within 3-7 days, the student's FASFA application will be processed
- Within 24 hours, the student's WASFA application will be available to the financial aid office(s)
- Review your answers for accuracy
- Make corrections if necessary
- Provide missing signatures if necessary

2. Contact your financial aid office

- There may be additional paperwork you need to complete
- Check your email and student portal regularly. Respond promptly to any requests.
- Prepare petitions or appeals and gather documentation if you have any special circumstances we discussed earlier.

3. Reapply every year in October

5. Prepare for Next Steps: Timeline



DON'T FORGET! FINANCIAL AID HUB



Financial Aid



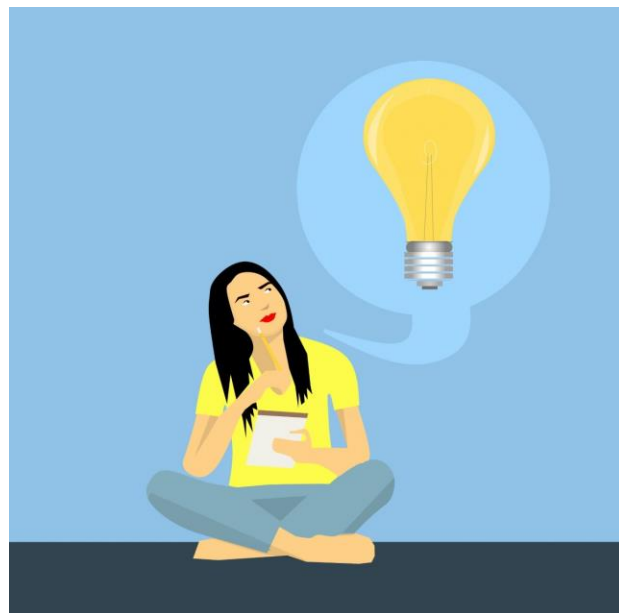
[Home](#) » [Our Approach](#) » [Financial Aid](#)

We have tons of resources in our financial aid hub:

1. Recorded presentations
2. Powerpoints
3. Handouts:
 - ✓ Required documents
 - ✓ Special circumstance appeals

<https://www.collegesuccessfoundation.org/our-approach/financial-aid/>

Questions? Comments? Help?



scholarshipservices@collegesuccessfoundation.org