

Financial Aid 101



FAFSA Overview & Tips



Your Presenter

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Welcome



We plan to provide you with information about:

- FAFSA & Financial Aid Tips
- How to apply for Financial Aid & Create an FSA Account
- How to complete the FAFSA Line by Line Review
- Available Resources

Pheaa.org/ResourcesStudents

Certified Browsers

Complete the online *Free Application for Federal Student Aid* (FAFSA®) form using the latest release of one of the following browsers:



Mozilla Firefox
(Version 68+)



Google Chrome
(Version 76+)



Apple Safari
(Version 9+)

Visit studentaid.gov/help/browser-requirements for the most up-to-date information on browsers.

What's NEW in Financial Aid



NEW

The Department of Education is implementing **four** new questions on **race, ethnicity, and gender**, which will appear in a *voluntary* survey on the 2023-24 FAFSA.

- Applicants will be asked their gender, whether they are transgender, their race, and their ethnicity.
- These questions will not affect eligibility for federal student aid
- Schools will not receive this information.

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

FAFSA Tips

Review untaxed income questions

Review asset questions

529 Plans must be reported as a parent asset

Assets do NOT include home, retirement or insurance

Do not report a business assets if family owned, you control more than 50% and it employs less than 100 full-time employees

Do not report farm assets, if you live on farm

Some can skip asset questions

Start with the **FORMS**

FAFSA – Free Application for Federal Student Aid

- Required by **ALL Schools, PHEAA** and some scholarship organizations
- Required every year attending

STATE GRANT FORM through PHEAA

- Required first year for all students

KNOW WHAT FORMS EACH SCHOOL ***REQUIRES***



Know Your Deadlines

Federal Deadlines - Apply anytime after
October 1 in the year prior to when you will attend school
(AY 2023-24: 10/1/22 to 6/30/24)



PA State Grant Deadlines for FAFSA

May 1, 2023 - First-time and renewal students attending colleges, universities & college transferrable programs (excluding community colleges)

August 1, 2023 – First-time students attending community college; a business, trade or technical schools, hospital school of nursing; Open Admissions Institutions or a 2-year non-transferrable degree program at a Jr or 4-year college

School Deadlines - vary, check websites!



FAFSA

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





Info Students/Parent(s) May Need to Complete the FAFSA

- Social Security Numbers – Student & Parent.
- Driver's license (student only; this information is optional).
- Federal income tax return (1040) – From Two Years Prior to Application Year.
- W-2 forms from all employers – From Two Years Prior to Application Year.
- Checking and Savings Balances/Statements – As of date of FAFSA submission.
- Current business and farm records (if >100 employees / if you don't live on the farm).
- Records of any stocks, bonds and other investments, including 529 accounts (Net amounts). **529 Values are for all Accounts owned, not just for the FAFSA applicant.**
- Additional untaxed income, tax records may be needed such as: Veteran's non-educational benefits, child support paid/received, workers' compensation, disability payments.
- Alien registration or permanent resident card information, if applicable.

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.
- Create prior to completing the FAFSA.
- Legal signature for student and parent.

Social Security Number

Username

Password

Email Address

Mobile Phone

Security Questions

Enable Two-Step Verification

Added Two-Step Verification to Access Account

- As of July 10, all new customers (users creating an account for the first time) are required to set up one or more two-step verification methods (text, email, or authenticator app) as part of the “Create an Account” process.
- Once one or more two-step verification methods are set up, the customer will receive a secure code each they log in to studentaid.gov.


NEW


Protect Your Account with Two-Step Verification


Two-step verification helps to protect your account. Your verified methods can be used to log in and to recover your account.

To update or verify your email address or mobile phone number, visit the [contact information page](#).


✓ Your verified method(s) can now be used to log in.

 **SMS Verification** Verified [Update Contact Information](#)

 **Email Verification** Verified [Update Contact Information](#)

 **Use an Authenticator App (Most Secure Option)**

Use an authenticator app that you've downloaded from a mobile app store to view in-app secure codes—visible only to you—that can confirm your identity when you log in. [Learn more](#)

 [Set Up an Authenticator App](#)

Get Help while Completing the FAFSA

Need assistance while completing the FAFSA?

<https://studentaid.gov/help-center/contact>

- » Live chat
- » email
- » Phone: 800-433-3243

The screenshot shows a section of the FAFSA form titled "STUDENT INFORMATION" and "Student Selective Service". It contains two questions, both with help icons (a question mark inside a circle). The first question is "Are you male or female?" with radio button options for "Male" (selected) and "Female". The second question is "Are you registered with the Selective Service System?" with radio button options for "Yes" (selected) and "No". Below the questions are "Previous" and "Continue" buttons. To the right of the questions, there is a detailed explanation for the first question, stating it is question 33 on the FAFSA form and explaining the Selective Service requirement for males aged 18-25. At the bottom right, there is a feedback section titled "Is this answer helpful?" with thumbs up and thumbs down icons. A blue arrow points from the text "Click the '?' for help with the questions" to the help icon of the first question.

STUDENT INFORMATION

Student Selective Service

Are you male or female? ⓘ

☒ Male

☐ Female

Are you registered with the Selective Service System? ⓘ

☒ Yes

☐ No

Previous Continue

Click the '?' for help with the questions

Are you male or female?

This is question 33 on the Free Application for Federal Student Aid (FAFSA®) PDF.

Your sex is used to determine if you need to register with the Selective Service System (SSS). Most male citizens and immigrants between the ages of 18-25 must register with the SSS. This requirement applies to any person assigned the sex of male at birth.

Your registration status with the SSS no longer affects your eligibility to receive federal student aid; however, you can still register through the FAFSA form.

Select "male" if you're male.

Select "female" if you're female.

Is this answer helpful?

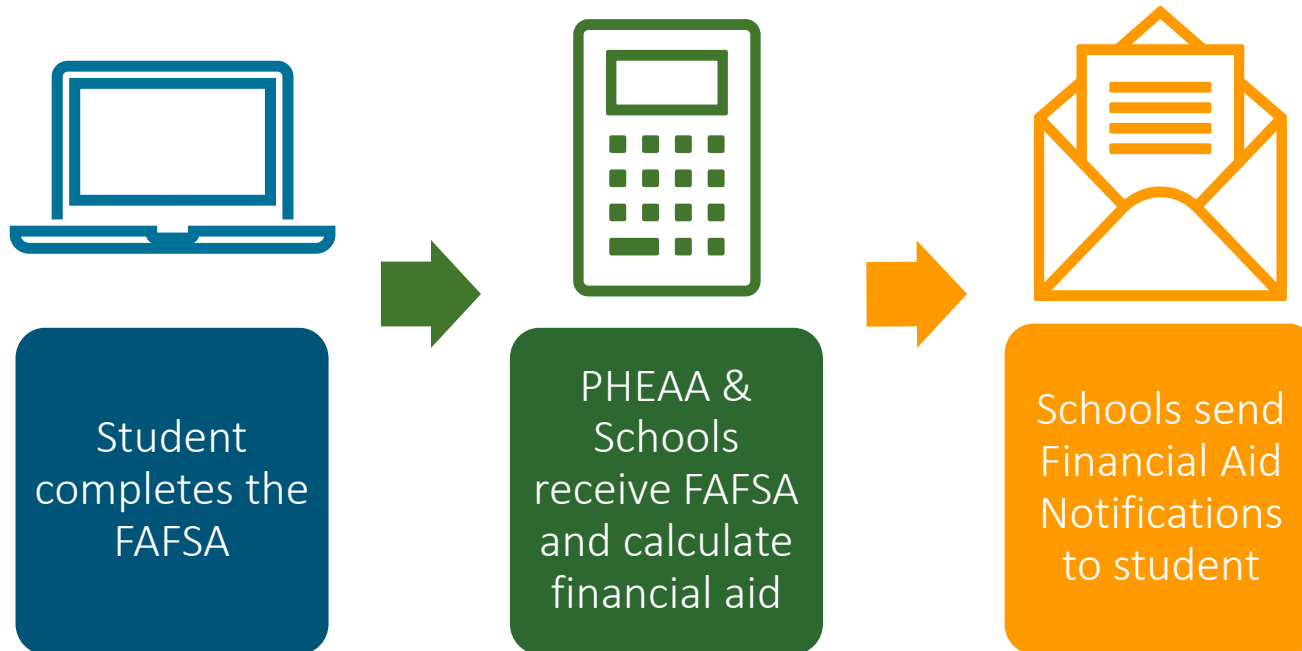
👍 👎

Special Circumstances

If things change....

- Divorced or separated parents
 - Recent death or disability
 - Reduced income
 - Unemployment
 - Medical or dental expenses not covered by insurance
 - Non-recurring Income or Expenses
-
- ✓ Only a school can change a FAFSA related to circumstances
 - ✓ Decisions are final and cannot be appealed to U.S. Department of Education
 - ✓ Contact PHEAA for PA State Grant re-consideration

FAFSA is Filed... Now What?



Getting Started



StudentAid.gov

As official website of the United States government.

Help Center Submit a Complaint English | Español

FederalStudentAid
An official website of the U.S. Department of Education

FAFSA® Form ▾ Loans and Grants ▾ Loan Repayment ▾ Loan Forgiveness ▾ Log In | Create Account 🔍

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

FederalStudentAid
An official website of the U.S. Department of Education

FAFSA® Form ▾ Loans and Grants ▾ Loan Repayment ▾ Loan Forgiveness ▾ Log In | Create Account 🔍

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)

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,

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?



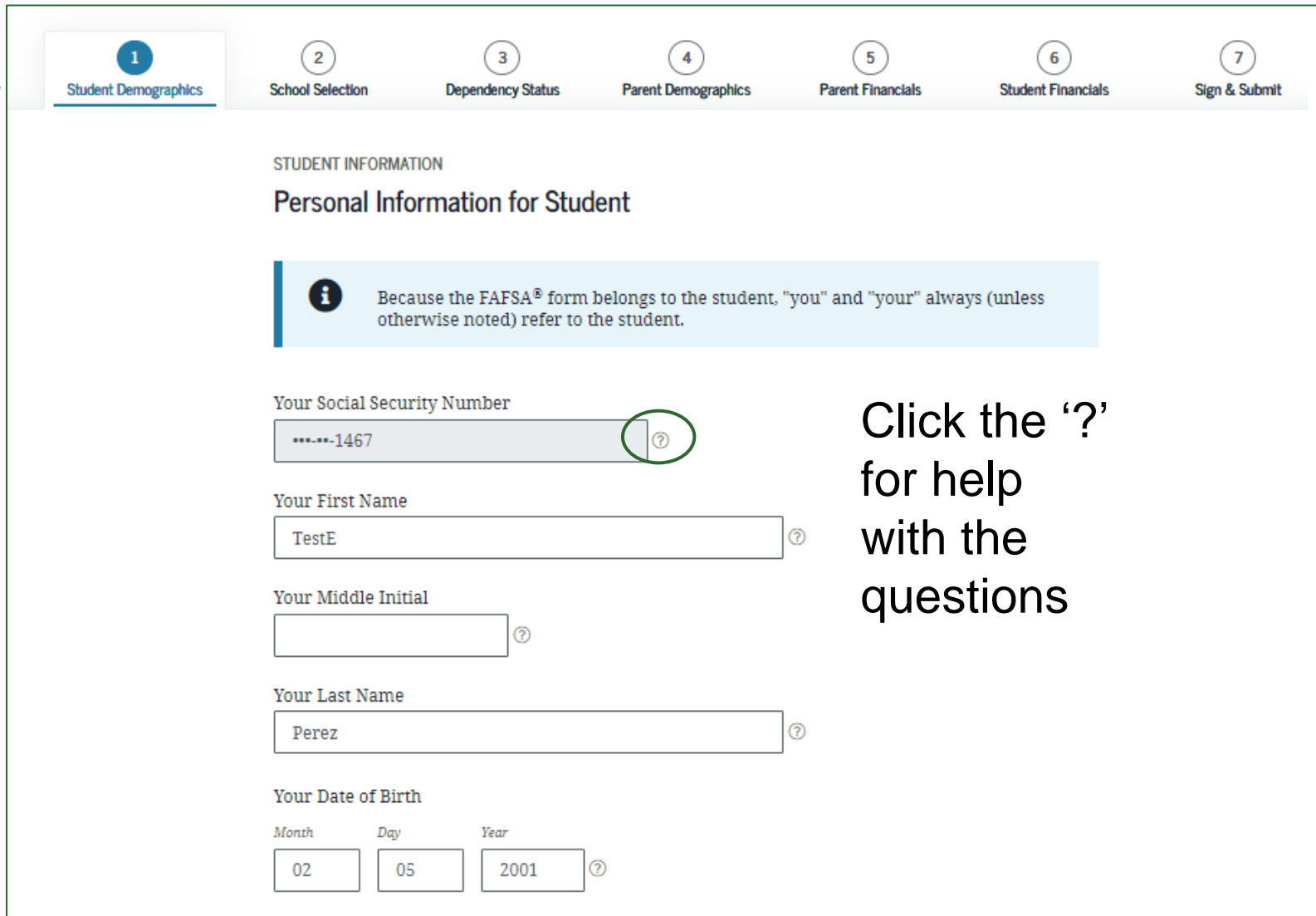
What is FAFSA web's security and privacy?



Continue

Personal Information for Student


The navigation bar tells you where you are in the application





The screenshot shows the FAFSA application interface. A green arrow points from the text 'The navigation bar tells you where you are in the application' to the navigation bar. The navigation bar has seven steps: 1. Student Demographics (active), 2. School Selection, 3. Dependency Status, 4. Parent Demographics, 5. Parent Financials, 6. Student Financials, and 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
 

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

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Student Financials

7

Sign & Submit

STUDENT INFORMATION

Student Email and Phone

Your Email Address

595011467@test.com

?

Reenter Your Email Address

595011467@test.com

?

Your Telephone Number

?

Previous

Continue

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

Student Address

1

Student Demographics

2

School Selection

3

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Sign & Submit

STUDENT INFORMATION

Student Address

Your Permanent Mailing Address (include apt. number)

100 Main St



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

Manchester



Your State

New Hampshire



Your ZIP Code

03245




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

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3

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4

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5

Parent Financials

6

Student Financials

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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

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4

Parent Demographics

5

Parent Financials

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Student Financials

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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




STUDENT INFORMATION

Add Your High School

 Application was successfully saved.

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

 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



School Selection

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

^	University of Pittsburgh Federal School Code: 008815 Pittsburgh, PA View College Info
01	Housing Plan
v	<div>Select Housing Plan ?</div> <div> Remove</div>
v	

[+ Add More Schools](#)

[Compare All Schools](#)

[Previous](#)

[Continue](#)

Housing choices:

- on campus
- off campus
- with parent

Student Marital Status

✓
Student Demographics

✓
School Selection

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Sign & Submit

SCHOOL SELECTION

Student Marital Status

✓

Application was successfully saved.

i

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

What is your marital status as of today?

Single

Previous

Continue

Does the Student Have Dependents?

✓
Student Demographics

✓
School Selection

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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[®] 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](#)

Parent Marital Status

✓
Student Demographics

✓
School Selection

✓
Dependency Status

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Sign & Submit

PARENT INFORMATION

Parent Marital Status

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

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

Married or remarried

When did your parents get married or remarried?

Month

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

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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

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Parent Financials

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Student Financials

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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 ?

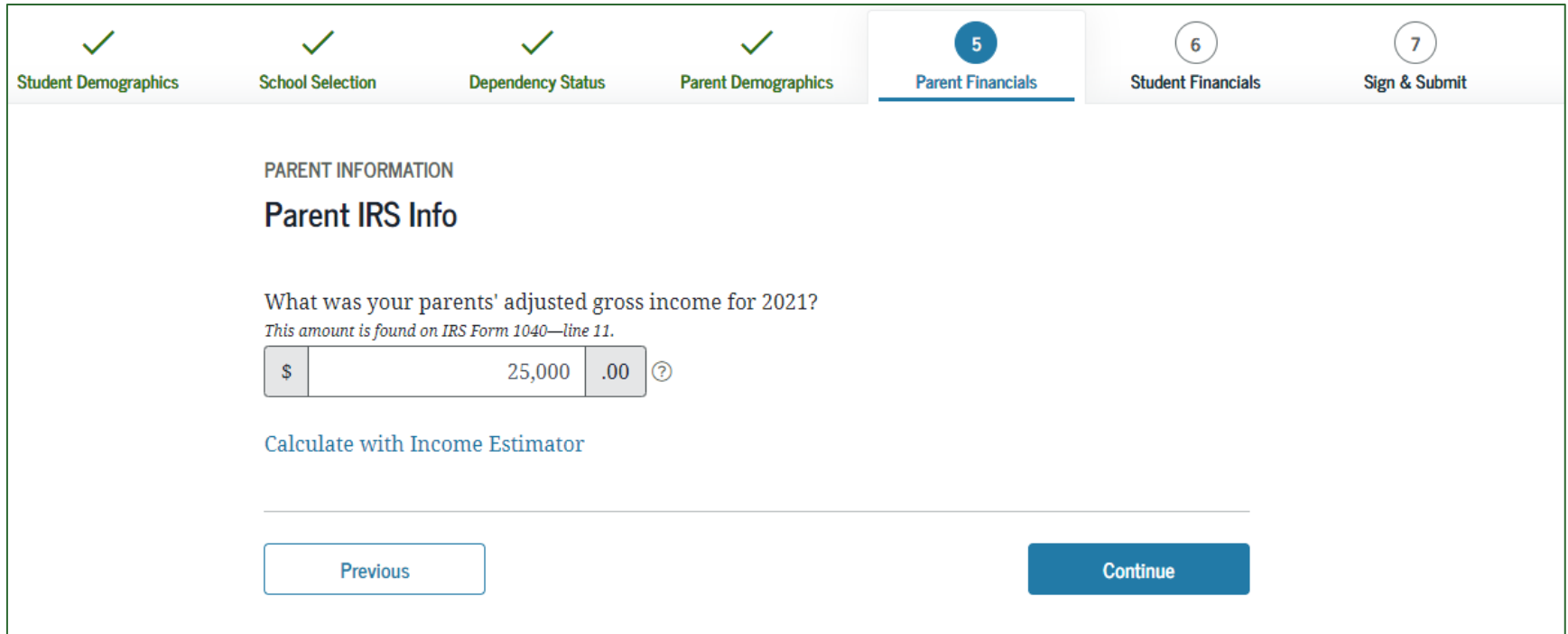
By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.

☐

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 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.

\$?

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

\$?

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

\$?

Previous

Continue

Parent Untaxed Income

PARENT INFORMATION

Parent Untaxed Income

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

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

\$?

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

\$?

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

\$?

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

\$?

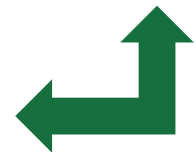
Other untaxed income not reported, such as workers' compensation, disability benefits, etc.

\$?



Parent Financials

*Payments to
tax-deferred
pension*



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




Payments to Tax-Deferred Pension and Retirement Savings Plans

- Only include if you have one of the following letters: D, E, F, G, H and S, listed next to an amount in boxes 12a to 12d of the W-2

22222		a Employee's social security number 123-45-6789		OMB No. 1545-0008	
b Employer identification number (EIN) 11-1111112			1 Wages, tips, other compensation 98,500.00		2 Federal income tax withheld 15,000.00
c Employer's name, address, and ZIP code TOPCOMPANY 123 STREET RD ANYWHERE, USA, 12345			3 Social security wages 100,000.00		4 Social security tax withheld 5000.00
			5 Medicare wages and tips 100,000.00		6 Medicare tax withheld 1100.00
			7 Social security tips		8 Allocated tips
d Control number			9		10 Dependent care benefits
e Employee's first name and initial Last name TOM T. TAXPAYER 456 ROAD ST ANYWHERE, USA, 12345			11 Nonqualified plans		12a D 1,500.00
			13 Statutory employee <input type="checkbox"/> Retiree <input checked="" type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b DD 1,000.00
			14 Other		12c
					12d
f Employee's address and ZIP code					
15 State US	Employer's state ID number 1234	16 State wages, tips, etc. 100,000	17 State income tax 3000	18 Local wages, tips, etc. 100,000	19 Local income tax 4000
				20 Locality name USA	

Form **W-2** Wage and Tax Statement
Copy 1—For State, City, or Local Tax Department

Department of the Treasury—Internal Revenue Service



Parent Assets



Parent Financials

PARENT INFORMATION

Parent Assets

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

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

As of today, what is the net worth of your parents' current businesses and/or investment farms?

Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

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[®] Summary



You're not done yet!

You still need to submit your FAFSA[®] 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 & 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 & 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

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

Federal Student Aid
BY 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.
- **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

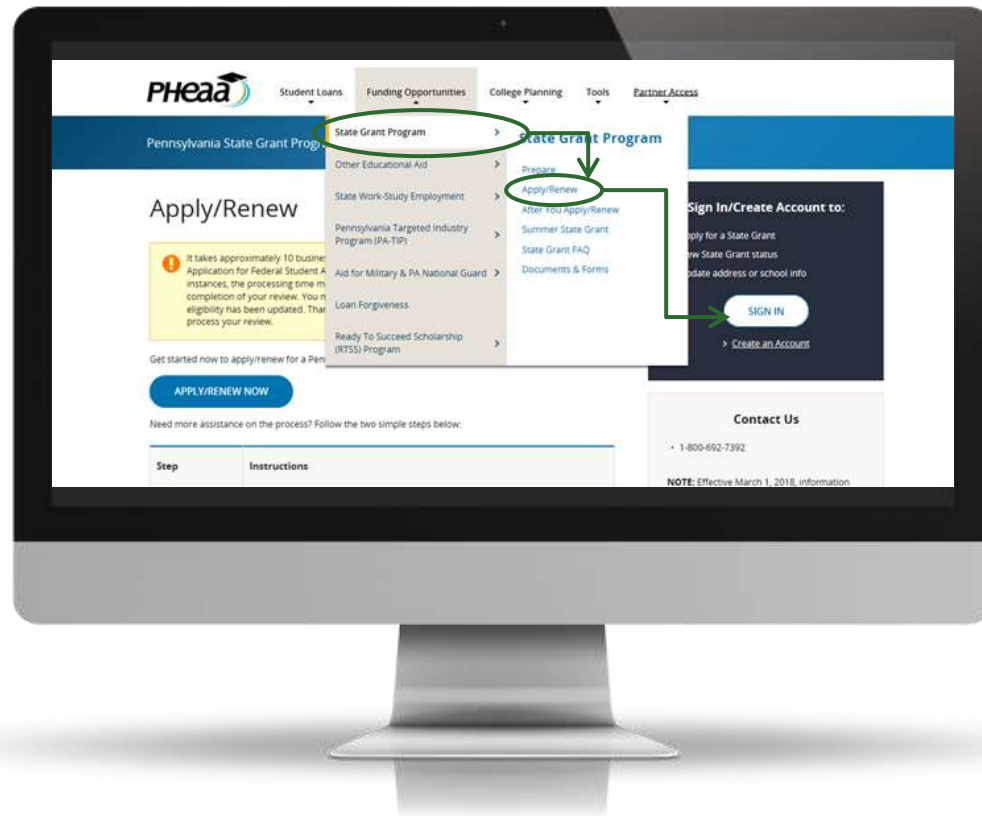
Some of my information is incorrect ?

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

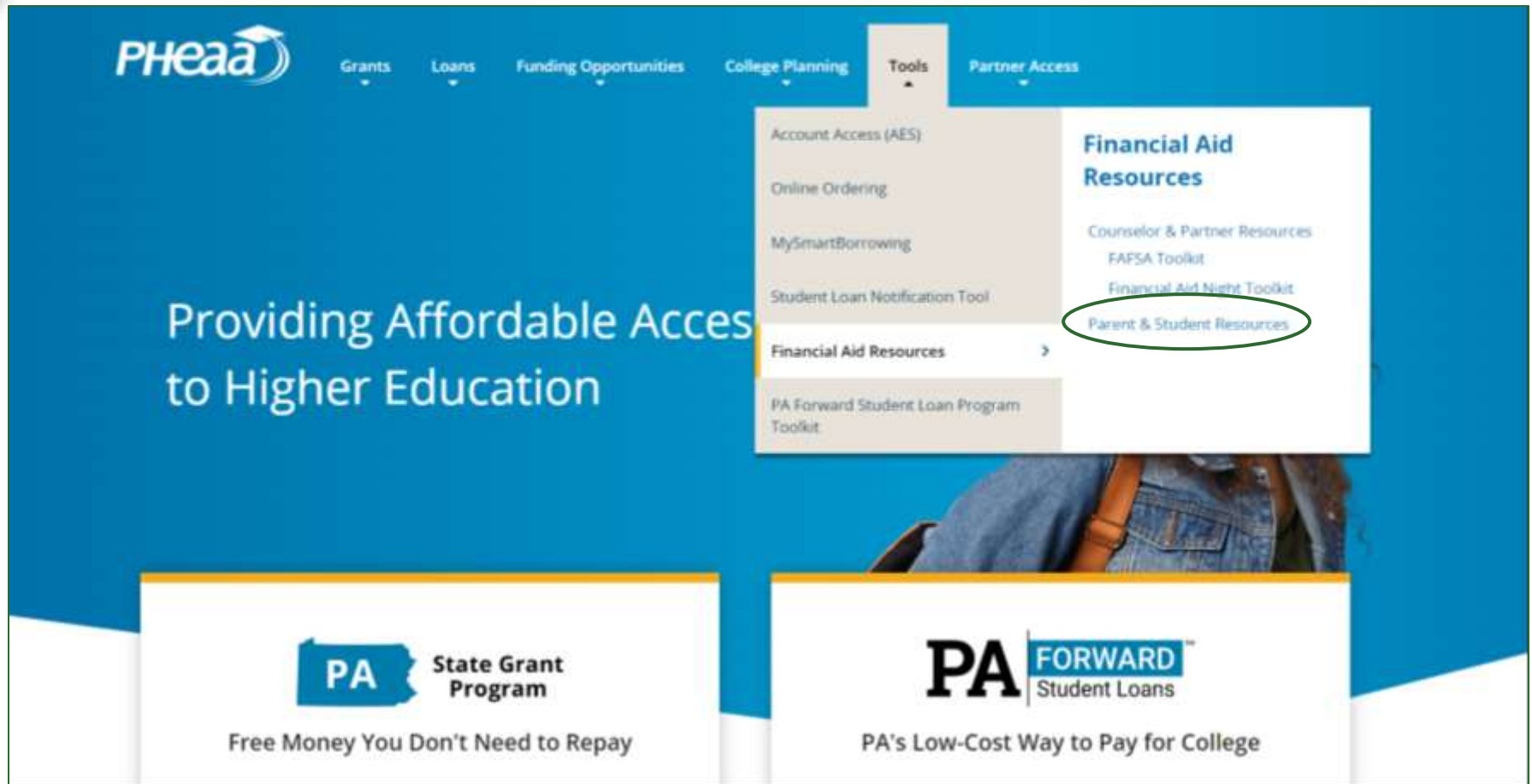


Use Your Resources

- **PHEAA.org**
- **EducationPlanner.org**
- **MySmartBorrowing.org**
- **YouCanDealWithIt.com**
- PHEAA toll free: 800-692-7392
- Federal Student Aid Info Center: 800-433-3243
- **studentaid.gov** – The one-stop shop site for all financial aid information.
- **studentaid.gov/FAFSA** – Direct link to the FAFSA



PHEAA.org/ResourcesStudents



The screenshot shows the PHEAA website interface. The top navigation bar includes 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' option is highlighted with a green circle. Below the main navigation, the text 'Providing Affordable Access to Higher Education' is visible. At the bottom, there are two promotional banners: 'PA State Grant Program' with the tagline 'Free Money You Don't Need to Repay' and 'PA FORWARD Student Loans' with the tagline 'PA's Low-Cost Way to Pay for College'.

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

Presenter Contact Information

Michael F. Burke



Higher Education Access Partner
PA Higher Education Assistance Agency
(PHEAA)

215-205-5451

michael.burke@pheaa.org

