



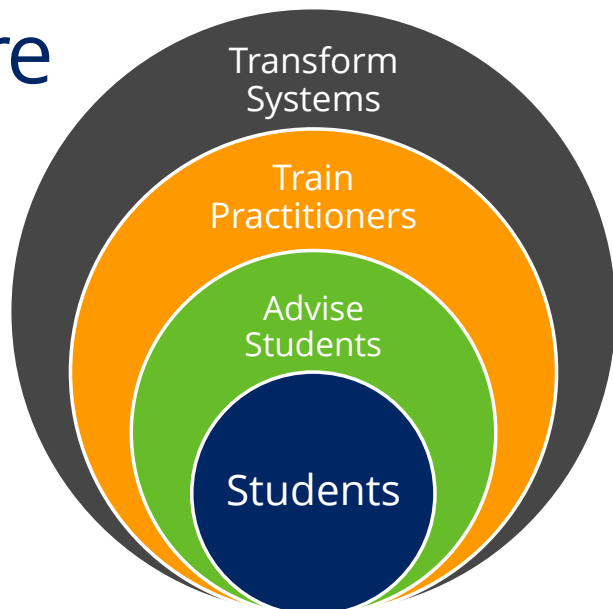
FAFSA Part 1

TxCAN

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About uAspire

uAspire is a national nonprofit organization hyper-focused on college affordability



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About Your Trainer



Meghan McComb (she/her)

Training Specialist

- Located in Michigan
- Former advisor with Michigan State University College Advising Corps
- I love baking!

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Agenda

- Pre-Survey
- FAFSA Simplification Overview
- FSA ID Creation
- Dependent Student Walkthrough
 - Personal Circumstances
 - Student Demographics
 - Financial Information
- Post-Survey & Evaluation

The logo for u·aspire, featuring the text "u·aspire" in a white, sans-serif font on a dark blue background.

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Learning Objectives

By the end of today's training, you will be able to:

- Explain the importance of timely FSA ID creation
- Determine whether a student is considered dependent or independent for the purposes of federal student aid
- Identify who should be reported as the parent(s) on a dependent student's FAFSA

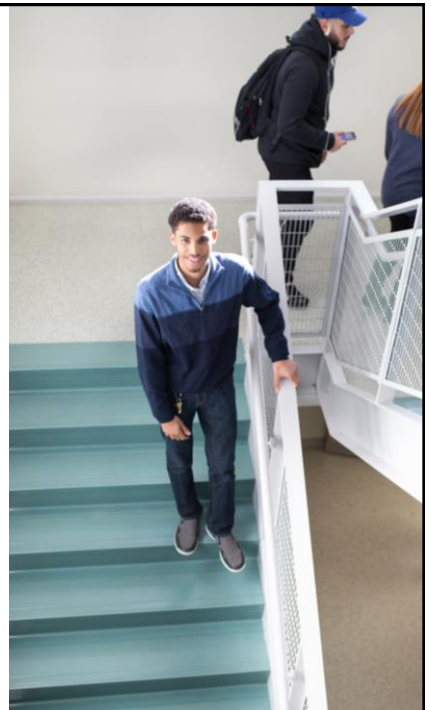
The logo for u·aspire, featuring the text "u·aspire" in a white, sans-serif font on a dark blue background.

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FAFSA Simplification Overview



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Major Changes



- 2024-25 FAFSA opens in **December 2023**
- FSA ID required for all users
- Role-based completion
- **IRS Direct Data Exchange (DDX)** replacing Data Retrieval Tool (DRT)
- **Student Aid Index (SAI)** replacing Expected Family Contribution (EFC)

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Disclaimer

- Most screenshots are from the FAFSA Preview Presentation provided by Federal Student Aid (FSA)
- Information shared here reflects the best of uAspire's understanding at this time



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Contributors & FSA ID



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What's a Contributor?



- Anyone who is required to provide information on the FAFSA



- Every contributor will need an **FSA ID** to access the FAFSA

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FSA ID Creation

- Contributors can create an account username and password on studentaid.gov
- Verified email address required



Set up ALL forms of multi-factor authentication

Protect Your Account with Two-Step Verification

Whenever you sign in, we'll send a secure code to make sure it's really you. To keep your account protected, make sure your phone number and email are verified. We also suggest setting up verification using a secure authenticator app.



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



SMS Verification

5554324567

Verified



Email Verification

john.doe.original@gmail.com

Verified



Authenticator App

Verified



Your authenticator app can now be used to log in.

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Undocumented Parents



- Parents without a Social Security Number (SSN) will now be able to create an FSA ID
- During account creation, they will have to answer "knowledge-based identity" questions

If successful

Parent's FSA ID will be verified immediately

If unsuccessful

Parent must complete a manual documentation process

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Manual Documentation



- **Call FSA Information Center:** 1-800-433-3243
- Similar to the account recovery process

Attestation Form

*Will be available on
studentaid.gov*



Forms of ID:

- Driver's License
- State ID
- Passport

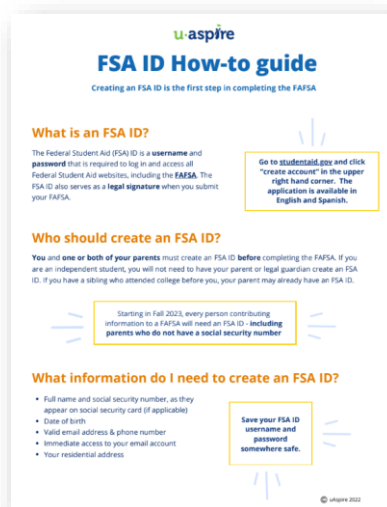
OR

A Utility Bill AND one ID:

- Municipal ID
- Community ID
- Consular ID

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Tool: FSA ID How-to Guide



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Dependent Student Walkthrough



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The screenshot shows the Federal Student Aid website interface. At the top, it says "An official website of the United States government." and "Help Center English | Español". The main header includes "FederalStudentAid" and navigation links for "FAFSA", "Loans & Grants", "Repayment", and "Loan Forgiveness".

The main content area features a large blue banner with the text "Get Money to Pay for School" and "Use the Free Application for Student Aid (FAFSA) to apply for financial aid for college." Below this, it says "2024-25 FAFSA Form" and has two buttons: "Start a New Form" and "Edit Existing Form".

Callouts on the page include:

- An orange box around the "Start a New Form" button.
- An orange box around the text "Release date TBD by Federal Student Aid".
- An orange box around the text "Available in English and Spanish" with a speech bubble pointing to the top right corner.

At the bottom, there is a section titled "Check FAFSA® Deadlines for the State You Live In" with a form for "School Year" and "State of Residence", a "Find Deadlines" button, and a link to "View All FAFSA Deadlines".

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The screenshot shows the Federal Student Aid login page. At the top, there are links for 'Help Center', 'Submit a Complaint', and 'English | Español'. Below these are navigation links for 'FAFSA® Form', 'Loans and Grants', 'Loan Repayment', and 'Loan Forgiveness'. The main section is titled 'Log In' and contains a 'Log In' button. Below the login button are links for 'Forgot My Username' and 'Forgot My Password'. A green callout bubble points to the 'Log In' button with the text 'FSA ID required to log in'. Another green callout bubble points to the 'Create Account' link below the login button with the text 'If needed, users can create an FSA ID and use it immediately to start the FAFSA'.

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The screenshot shows the FAFSA form selection screen. At the top, there is a banner with the text 'Welcome, Raya, to the FAFSA® Form'. Below the banner is a section titled 'I am starting the FAFSA form as a'. There are two options: 'Student' (selected) and 'Parent'. The 'Student' option is highlighted with a blue box, and the 'Parent' option is highlighted with a green box. Two callout bubbles are present: a blue one for the 'Student' option stating 'In Part 1, we will walk through the questions a **dependent student** will see when starting the FAFSA' and an orange one for the 'Parent' option stating 'In Part 2, we will walk through the questions **parent(s)** will see when invited as contributor(s)'.

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NEW


Onboarding pages provide an overview of the FAFSA process

Understanding the FAFSA® Form

1 of 4

What is the FAFSA® form?

Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for grants, scholarships, work-study funds, and loans for college or graduate school.



FAFSA® Overview

Previous
Continue

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FAFSA® FORM 2024-25
 Student Raya Tran

Save
FAFSA Menu

Student Identity Information

Review the information below and verify that it's correct before moving forward.

Name
Raya A. Tran

Date of Birth
05/05/1995

Social Security Number
***-**-1234

Email Address
rayaatran@gmail.com

Mobile Phone Number
(555) 555-5555

If any info is incorrect,
must update within
FSA ID account settings

To update this information for all federal student aid communications, go to Account Settings.

Permanent Mailing Address
Include apartment number.

12345 Sesame Street

City
New York

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FAFSA® FORM 2024-25 Student Raya Tran Save FAFSA Menu

Provide Consent or Be Ineligible for Federal Student Aid

Summary

Your consent is needed to retrieve and disclose federal tax information (FTI). With your consent, we can obtain tax return information automatically from the IRS to help you complete the FAFSA® form. If you don't provide consent, you will not be eligible for federal student aid, including grants and loans. You must provide consent even if you didn't file a U.S. federal tax return or any tax return at all.

→ Get your 2022 tax return information for the 2024-25 FAFSA form. → Tax return information is required to complete the FAFSA form.

→ FTI is used to determine your eligibility for federal student aid.

Under penalty of law, I certify that I have authorized the use of my federal tax information to determine my eligibility for federal student aid, and I approve and consent to:

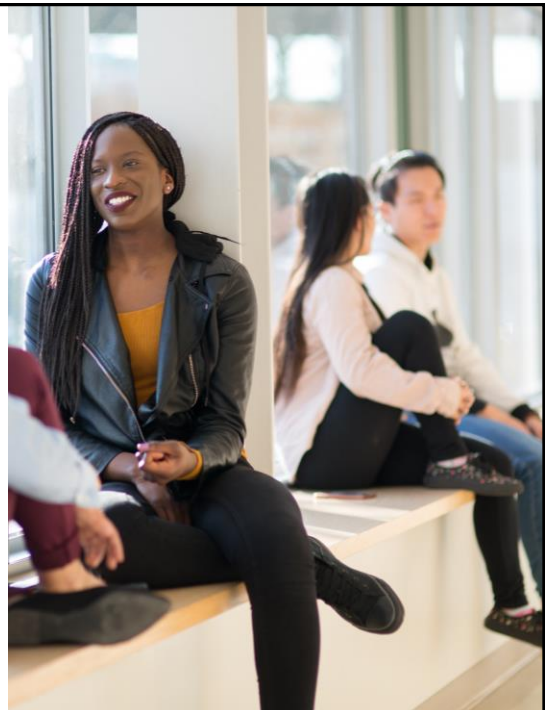
- The U.S. Department of Education and the U.S. Department of the Treasury, or their contractors, using my federal tax information to determine the eligibility for, and amount of, federal student aid for which I participated and shared my federal tax information by a program.
- The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 6109D)(13)), only for the purpose of determining the eligibility for, and amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program.

Consent is required to be eligible for federal student aid

All contributors to having the Information transferred automatically from the IRS

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Personal Circumstances



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1 Personal Circumstances 2 Demographics 3 Financials 4 Colleges 5 Signature

FAFSA[®] FORM 2024-25 Student Raya Tran Save FAFSA Menu

Your Personal Circumstances

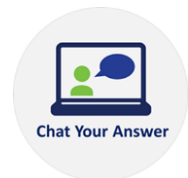
Tell us about your marital status; your financial dependencies; your plans for college; and any other special circumstances that may impact your aid eligibility (including if you've been homeless or at risk of becoming so).

- This information can affect how much aid you're eligible to receive.
- Based on your answers, we may need to collect additional information from other people.

Previous Continue

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Please chat in...



In which types of situations do you think a student would be independent on the FAFSA?

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A student is independent if they:

Will be 24 by January 1 of award year	Are married	Are working on a master's or doctorate
Serve in the U.S. armed forces or are a veteran	At any time after age 13 – were an orphan, ward of the court, or in foster care	Are an emancipated minor
Have a court-ordered legal guardian	Have children or dependents who live with and receive more half their support from them	Are an unaccompanied youth who is homeless

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Students with Dependents

- **Past:** “Do you now have or will you have children who receive half of their support from you?”
- **Now:** Must live with and be providing more than 50% financial support now and during the FAFSA year
- **Examples:** income from work, WIC, SNAP benefits, TANF, child support paid, etc.

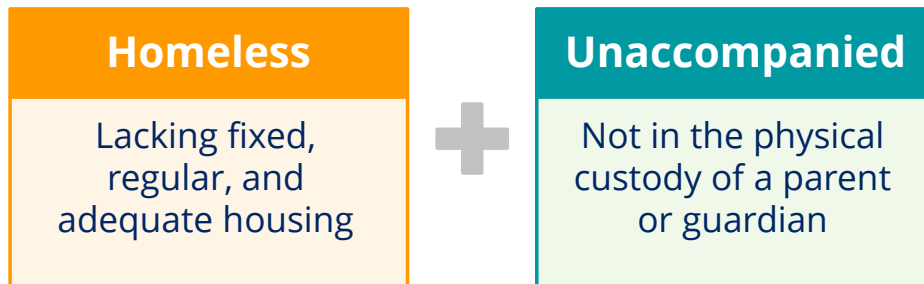


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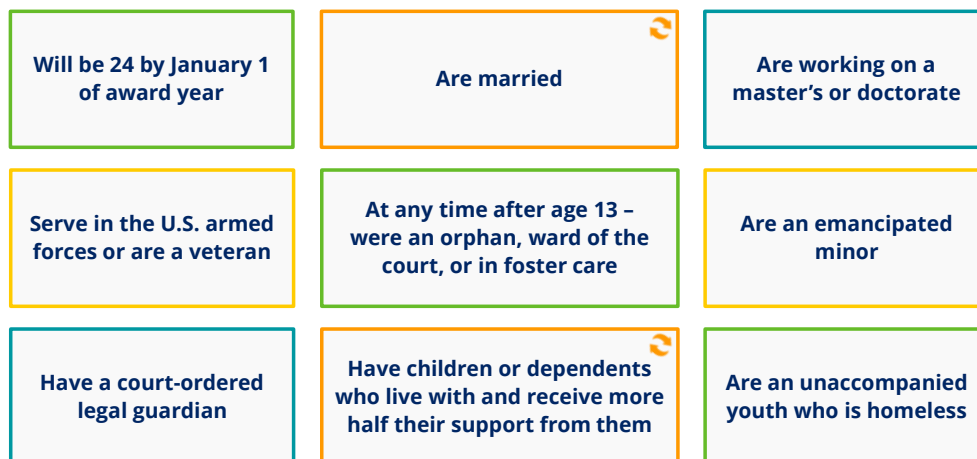
Determining Homelessness

Students must meet **both** conditions to be considered independent



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A student is independent if they:



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Check for Understanding



- Jaclyn (age 20) and her mom have been living together in a homeless shelter for the past 6 months. Is Jaclyn dependent or independent?

A. Dependent

B. Independent

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Check for Understanding



- Avery (age 18) has a baby and lives at home with their parents. Avery's parents support them both financially. Is Avery dependent or independent?

A. Dependent

B. Independent

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Check for Understanding



- Simone was in foster care from ages 13 to 15. She is now 17 and living with her biological parent. Is Simone dependent or independent?
 - A. Dependent
 - B. Independent**

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Check for Understanding



- Josh (age 19) lives with his uncle, who is not his legal guardian. He hasn't had contact with his parents in over 10 years.
 - A. Dependent**
 - B. Independent



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Student Unusual Circumstances

This information will help us evaluate the student's ability to pay for school.

Do unusual circumstances prevent the student from contacting their parents or would contacting their parents pose a risk to the student?

A person experiencing unusual circumstances may have:

- Left home due to an abusive or threatening environment;
- Been abandoned by or estranged from their parents, and have not been adopted;
- Been granted refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country;
- Been a victim of human trafficking;
- Been incarcerated, or their parents are incarcerated and contact with them would pose a risk to them; or
- Been otherwise unable to contact or locate their parents, and have not been adopted.

If their circumstances resulted in not having a safe, stable place to live, they may be considered a homeless youth and should review the answer to the previous question about being unaccompanied and homeless.

☐ Yes

Previous

If **Yes**, the student can submit the FAFSA with a **provisional independent** status and must follow up with the financial aid office



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Student Dependency Status



Dependent Student

Based on your answers, you're a dependent student, and since we assume parents of dependent students will help pay for your education if they are able, we need information about their finances and backgrounds. This information is used to determine how much financial aid you're eligible to receive.

Apply for a Direct Unsubsidized Loan Only

Are the student's parents unwilling to provide their information, but the student doesn't have an unusual circumstance that prevents them from contacting or obtaining their parents' information?

Select "Yes" if the student wants a financial aid administrator at their school to determine their eligibility for a Direct Unsubsidized Loan **only**.

☐ Yes

☒ No

First-year students can qualify for \$5,500 in Direct Unsubsidized Loans

Continue

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Parent Information



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Who is My Parent?



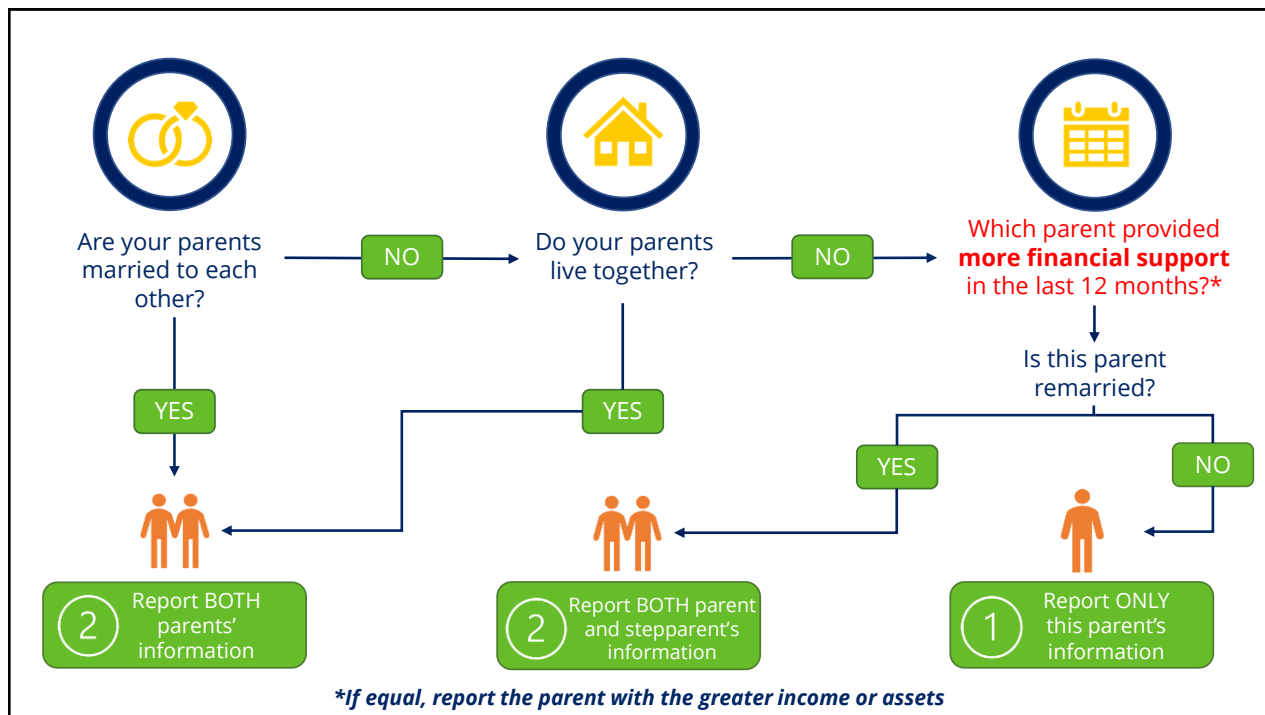
- A series of questions will help determine who is the parent on the FAFSA
- “Parents” are legal (biological or adoptive) parent



*Determine contributor(s)
before the FAFSA opens*

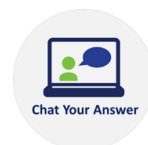
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Check for Understanding



- Jason lives with his parents, who are not legally married. His dad is unemployed, and his mom supports the family financially. Which parent(s) must report their info on Jason's FAFSA?

Answer: Both parents

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Check for Understanding



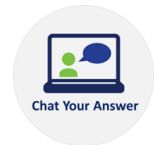
- Destiny's parents are divorced. She lives with her mom who claims her on their 2022 taxes. Her dad, who recently remarried, provides most of Destiny's financial support. Which parent(s) must report their info on Destiny's FAFSA?

Answer: Dad and stepparent

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Check for Understanding



- Isaac lives with his uncle who is not his legal guardian. Isaac's parents are separated and live out of state. They provide an equal amount of financial support for Isaac. Which parent(s) must report their info on Isaac's FAFSA?

Answer: Parent with the greater income/assets

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Enter information about the parent(s) identified on the prior page, and we'll send emails on your behalf.

Provide the parent's full legal name as it appears on their Social Security card. The email does not have to be the same as their account username and password (FSA ID).

Parent

Social Security Number (SSN)
 Hide

☒ My parent doesn't have an SSN.

Address

City

State

Zip Code

Country

[Send Invite](#)

Warning

Critical:
Used to invite and connect to contributor's portion

First Name

Last Name

Date of Birth
Month Day Year

Social Security Number (SSN)
 Hide

☐ My parent doesn't have an SSN.

Email Address

Confirm Email Address

[Send Invite](#)

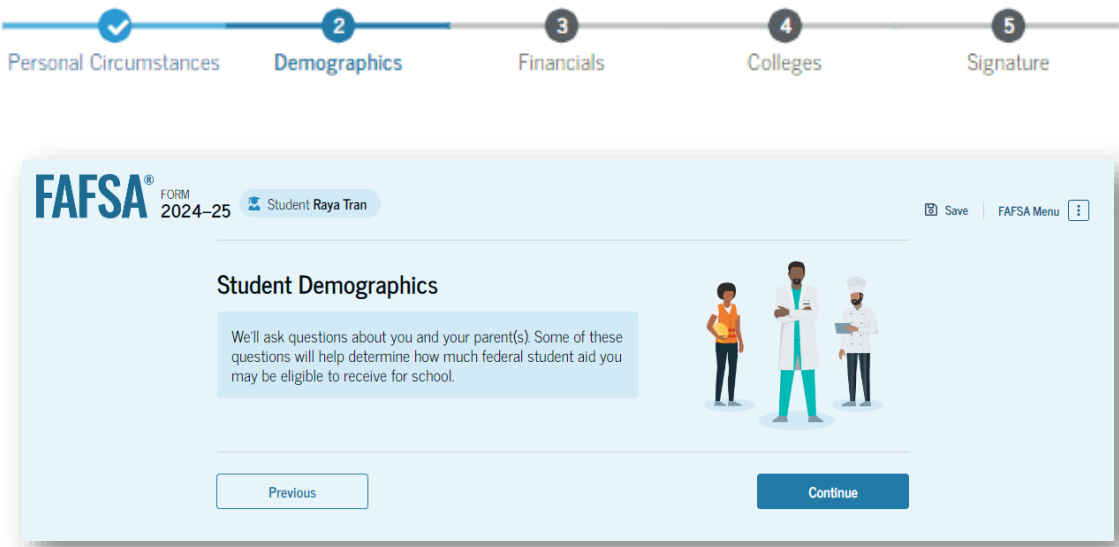
Checkbox for contributors without SSN

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Student Demographics

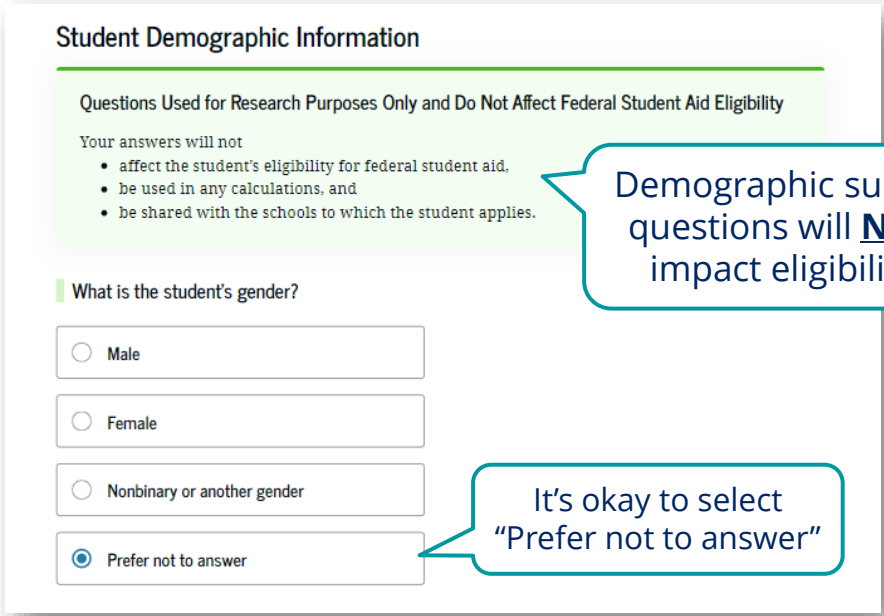


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The image shows the FAFSA 2024-25 Student Demographics screen. At the top, a progress bar indicates five steps: 1. Personal Circumstances (checked), 2. Demographics (active), 3. Financials, 4. Colleges, and 5. Signature. The main header displays the FAFSA logo, the form year (2024-25), and the student's name (Student Raya Tran). On the right, there are links for 'Save' and 'FAFSA Menu'. The central section is titled 'Student Demographics' and includes a text box explaining that questions will help determine federal student aid eligibility. To the right of this text is an illustration of three people. At the bottom, there are 'Previous' and 'Continue' buttons.

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The image shows the 'Student Demographic Information' screen. It features a green header with the title. Below the header, a green box contains the text: 'Questions Used for Research Purposes Only and Do Not Affect Federal Student Aid Eligibility'. This is followed by a statement: 'Your answers will not' and a bulleted list:

- affect the student's eligibility for federal student aid.
- be used in any calculations, and
- be shared with the schools to which the student applies.

 The main question is 'What is the student's gender?'. Below it are four radio button options: 'Male', 'Female', 'Nonbinary or another gender', and 'Prefer not to answer'. The 'Prefer not to answer' option is selected. Two callout boxes are present: one on the right stating 'Demographic survey questions will **NOT** impact eligibility' and one at the bottom right stating 'It's okay to select "Prefer not to answer"'.

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FAFSA[®] FORM 2024–25 **Student Raya Tran** Save FAFSA Menu

1 Personal Circumstances 2 **Demographics** 3 Financials 4 Colleges 5 Signature

Student Citizenship Status

☒ U.S. citizen or national

☐ Eligible noncitizen

☐ Neither U.S. citizen nor eligible noncitizen

Previous Continue

How should students answer this question?

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U.S. Citizen or National



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Eligible Noncitizen

- U.S. permanent residents
- Individuals with an I-94 showing: Refugee, Asylee, Cuban-Haitian Entrant, or Parolee
- Victims of human trafficking (T-Visa)
- Battered immigrants and children



U.S. Customs and Border Protection
Securing America's Borders

Get I-94 Number: **I-94FAQ**

Admission (I-94) Number Retrieval

Admission (I-94) Record Number: **6900088082**

Admit Until Date (MM/DD/YYYY): **10/10/2012**

Details provided on Admission(I-94) form:

Family Name:	LI
First (Given) Name:	LYDIA
Birth Date (MM/DD/YYYY):	01/01/1990

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Neither Citizen nor Eligible Noncitizen

- Holders of nonimmigrant visas (e.g. student, work, tourist)
- Individuals with Temporary Protected Status (TPS)
- Individuals with Deferred Action for Childhood Arrivals (DACA) status



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Tips for Undocumented Students

- Complete TASFA
- Contact colleges about institutional aid
- Apply for scholarships



**IMMIGRANTS
RISING**
TRANSFORMING LIVES THROUGH EDUCATION



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Financial Information



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Personal Circumstances Demographics **Financials** Colleges Signature

FAFSA® FORM 2024-25 Student *Raya Tran* Save FAFSA Menu


Your Finances

The FAFSA form helps schools determine your ability to pay for college without financial aid, so we ask in this section if you receive any federal or state entitlement benefits and if you have any investments, real estates, or other assets.

Previous Continue

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Federal Tax Information



Direct Data Exchange (DDX) will replace the IRS Data Retrieval Tool (DRT) as the process for transferring tax information from the IRS

↓

This will **reduce** the number of financial questions that most families will see on the FAFSA

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Direct Data Exchange FAQ

Can I see what was pulled from the IRS?

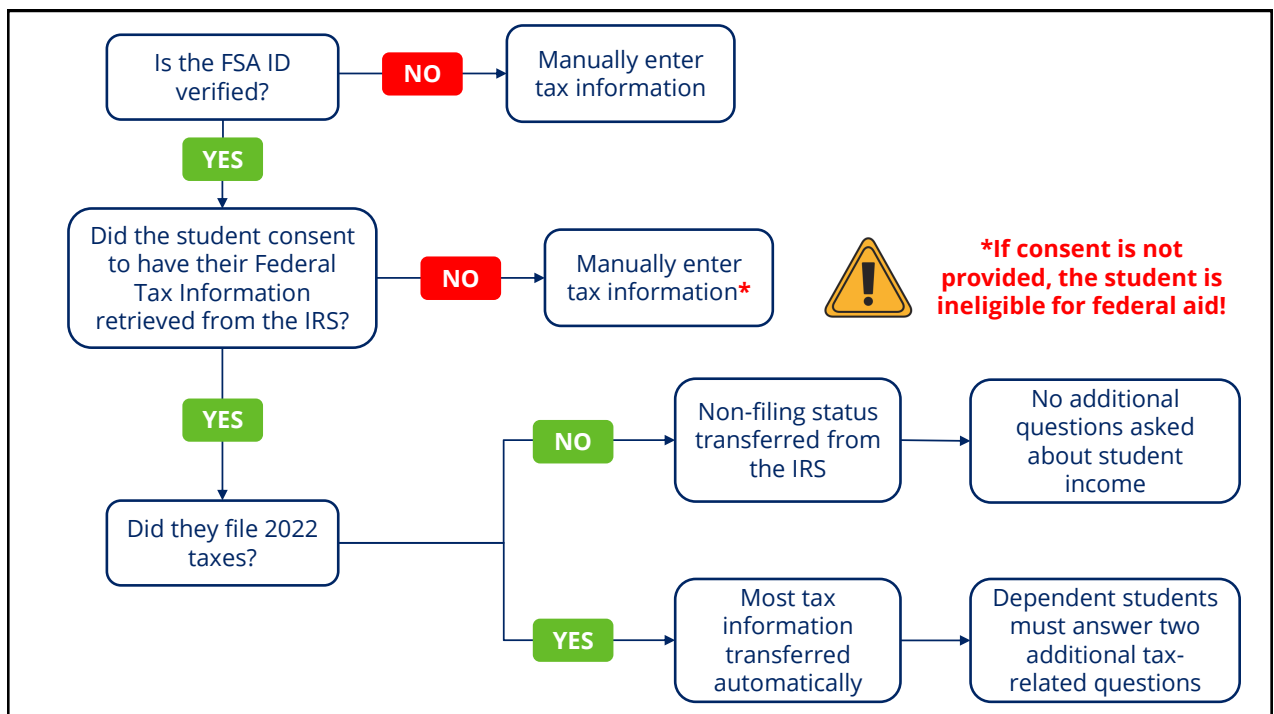
No, users are unable to see what federal tax information data that was pulled from the IRS

How would I know if DDX worked?

FAFSA will not have an indicator, the questions are automatically skipped

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Student 2022 Tax Return Information

Refer to the student's 2022 tax return to answer the following questions.

Convert all currency to U.S. dollars.

Amount of College Grants, Scholarships, or AmeriCorps Benefits Reported as Income to the IRS (optional)

The student paid taxes on these grants, scholarships, or benefits. These usually apply to those renewing their FAFSA® form, not to first-time applicants.

\$.00 ⓘ

Found on Schedule 1
Line – 8r

Foreign Earned Income Exclusion

\$.00

Found on Schedule 1
Line – 6d

Previous

Continue

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Student Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student financial aid

\$.00

Asset information is required if family AGI is more than \$60,000

Current Net Worth of Businesses and Investment Farms

Enter the net worth of the student's businesses or for-profit agriculture. Net worth is the value of the businesses or farms minus any debts owed against them.

\$.00

If a dependent student starts the FAFSA, they will always see the asset questions

Current Net Worth of Investments, Including Real Estate

Don't include the home the student lives in. Net worth is the value of the investments minus any debts owed against them.

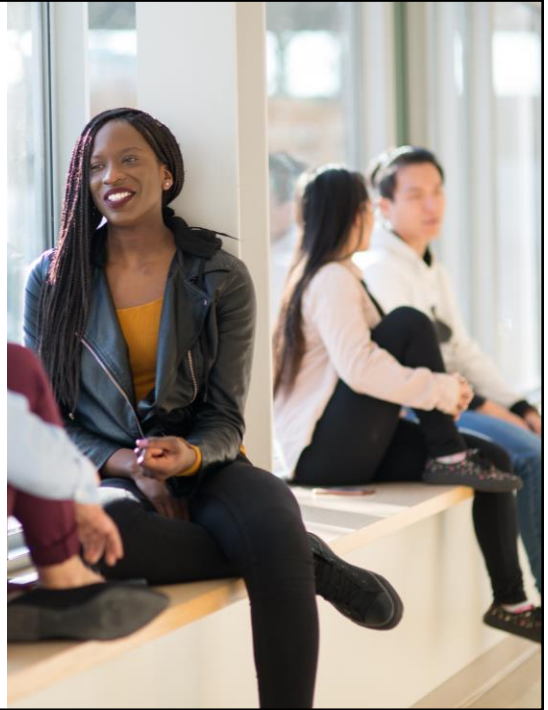
\$.00

**More to come in
FAFSA Part Two**

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College Selection



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**FAFSA**[®]
FORM
2024-25Student **Raya Tran**

Save

FAFSA Menu

Your Colleges

In this section, you'll search for and select schools you're considering so they will automatically receive an electronic copy of your FAFSA form. You don't need to worry if you don't end up applying to them - there is nothing else you need to do.



Previous

Continue

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FAFSA® FORM 2024-25 Student Raya Tran Save FAFSA Menu

Personal Circumstances Demographics Financials **Colleges** Expected Family Contribution

Selected Colleges

These are the colleges you want to receive your FAFSA information. To change the position of a school in your list, use the up and down arrows next to the school's name.

School list guidelines for Connecticut residents

To be eligible for state grant aid in Connecticut, you must list an eligible in-state college within the first 2 positions. If you update your school choices later, please notify your state agency by sending an email to sfa@ctohe.org

12 of 20 Schools Selected

Showing 1 to 10 of 12

1	<input type="button" value="↑"/> <input type="button" value="↓"/>	University of California Northridge, CA	Federal School Code G03453	
2	<input type="button" value="↑"/> <input type="button" value="↓"/>	University of California Northridge, CA	Federal School Code G03453	Remove View Info
3	<input type="button" value="↑"/> <input type="button" value="↓"/>	University of California Northridge, CA	Federal School Code G03453	Remove View Info

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Signature & Next Steps



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FAFSA[®] FORM 2024-25 Student Raya Tran

Take a moment to review before signing

Expand the sections below to review and edit the information you've entered before you sign your portion of the form.

Student Sections Expand All

- Introduction
- Personal Identifiers
- Section 1 Personal Circumstances
- Section 2 Demographics
- Section 3 Financials
- Section 4 Colleges
- Section 5 Signature

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FAFSA[®] FORM 2024-25 Student Raya Tran

Save FAFSA Menu

Personal Circumstances Demographics Financials Colleges Signature

Sign and Complete Your Part

Summary

This page confirms you understand the terms and conditions of the FAFSA form, and that you have filled it out accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your FSA ID. Because this is associated with your personal information, do not share it with anyone.

By signing this application electronically using your FSA ID (username and password) or by signing a signature page and mailing it to us, YOU, THE SIGNER, agree that you

- will use federal and/or state student financial aid only to pay the cost of attending college or other higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.

Can't submit until all contributors have completed their part

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FAFSA[®] FORM 2024-25 Student **Raya Tran** FAFSA Menu

You're Almost There!

The Student Section is complete!

Parent Contributors

Requirements for Dependent Students
Your FAFSA form is not complete until your parents complete the contributor section of the form and sign it. Once completed, your FAFSA form will be submitted for processing.

Parent Contributors	Date Request Sent	Status
Alcina Tran	07/13/2024	Invite Sent Edit
Travis Tran	07/13/2024	Invite Sent Edit

Track and Manage Your FAFSA Application and Your Contributors [View Status](#)

This application has been added to My Activity in your StudentAid.gov account. Go there to:

Can edit contributor information if needed

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Filling out the FAFSA[®]?

Wyatt's got your back.

Get 24/7 help completing the FAFSA.

[Sign Up](#)

Hi!

Wyatt here!

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FAFSA Part Two Preview

Parent
Walkthrough

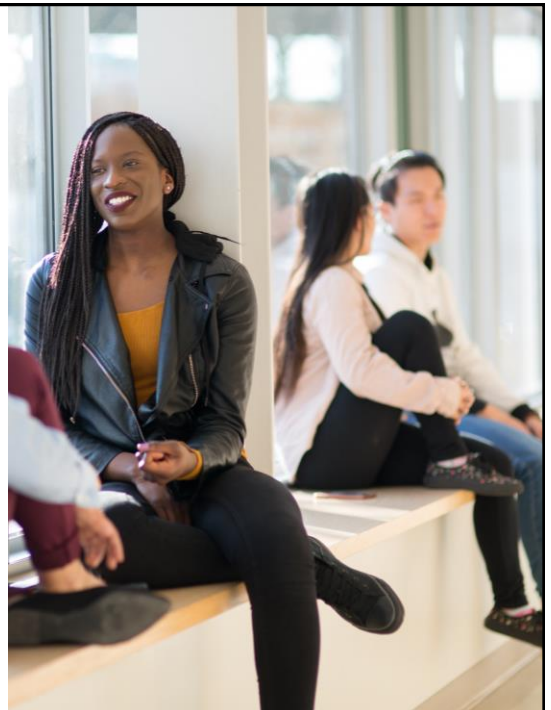
Submission &
Follow-up

Other FAFSA
Scenarios

Student Aid Index
(SAI)

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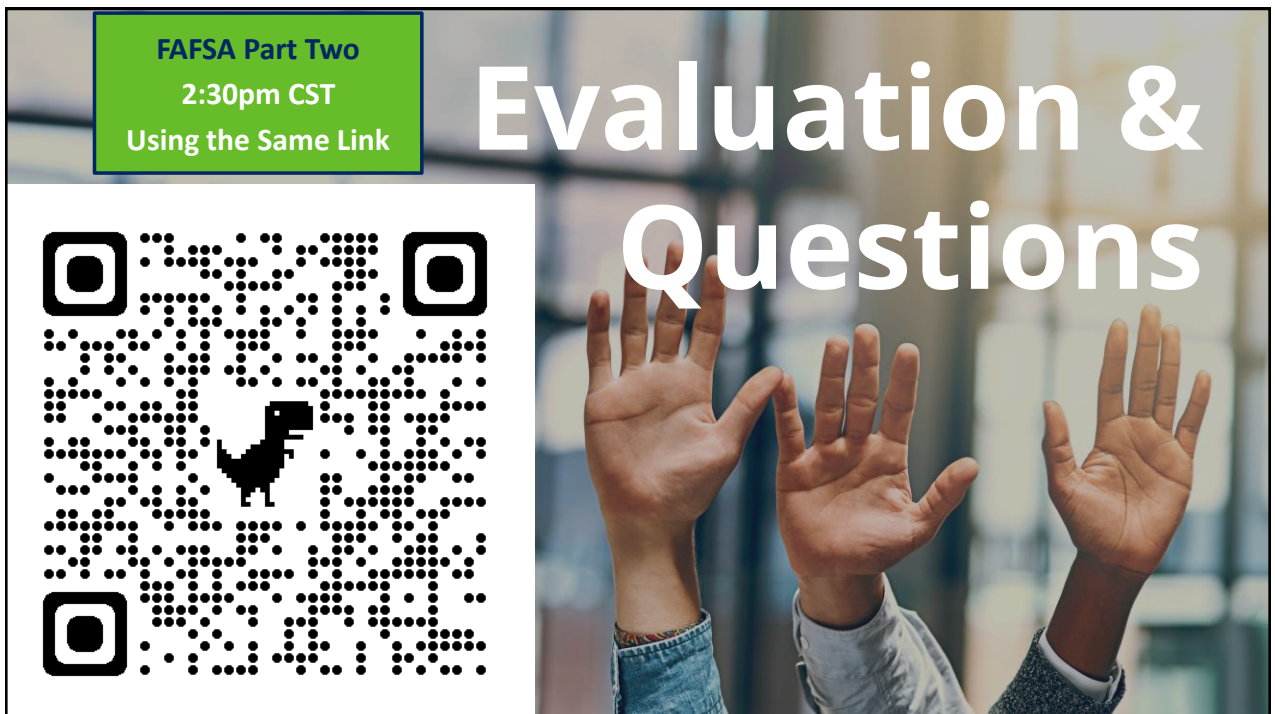
Post-Survey & Evaluation



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Financial aid information is constantly changing.
The content presented here reflects the best of
uAspire's understanding at the time of publication.

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