



Favorite seasonal
drink/flavor?



FAFSA Part 2

TxCAN

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About Your Trainer



Kassie Sweatt (she/her)

Training Specialist

- Former uAspire Advisor & Project Coordinator
- First generation college student
- Dog mom!

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Agenda

- Pre-Survey
- Parent Walkthrough
 - Financial Information
 - Family Size
- Submission & Follow-Up
- Other FAFSA Scenarios
- Student Aid Index
- 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:

- Identify the contributor(s) on a student's FAFSA
- Complete the financial sections for different family financial situations
- Identify key resources for supporting accurate FAFSA completion

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 Part One Recap

FSA ID

Dependency

Who is the
parent?

Student
Financial Section

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Parent Walkthrough



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FederalStudentAid

Help Complete Raya's Form

Alcina,

Raya T can't be eligible for federal student aid without your input. Help them complete the Free Application for Federal Student Aid (FAFSA®) form.

Providing information as a contributor does not make you financially responsible for Raya's education costs. Completing the FAFSA form is how they qualify for student aid including

- Federal Pell Grants,
- federal student loans,
- state financial aid, and
- school financial aid.

Log in with your FSA ID (account username and password) to complete your section.

Note: Forms are deleted after 45 days of inactivity.
Don't recognize Raya? Read [What To Do if You Got an Invite and Don't Recognize the Sender](#).

Log In

Parent(s) will receive an invitation to contribute to their student's FAFSA

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An official website of the United States government.

Help Center Submit a Complaint English | Español

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

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

Log In

Email, Phone, or FSA ID Username

test595011623

Password

***** Show Password

Log In

[Forgot My Username](#) | [Forgot My Password](#)

[Create an Account](#)

[Help Me Log In to My Account](#)

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Twitter Facebook Instagram YouTube News | usagov | vetgov | edgov | Site Feedback

Every contributor must have an FSA ID

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Parent Contributing to the FAFSA® Form

You have entered **Boya Tran's** FAFSA® form!

- This FAFSA form can't be submitted for processing until you provide some required personal and financial information.
- You can save this form and come back to it later.

Frequently Asked Questions

Why have I been invited to contribute to this FAFSA® form?

You have been invited to the student's form to provide personal and financial information that will help determine their eligibility for federal student aid.

Answers on the student's FAFSA form have indicated that you will need to provide additional information as a contributor to help determine their eligibility for federal student aid.

Does contributing to the form mean I'm responsible to pay for college?

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FORM 2024-25 Parent of Raya Tran

Understanding the FAFSA® Form

4 of 4

After Submitting the FAFSA® Form

Once the student's FAFSA® form is submitted, the student will need to check on its status and make corrections, if required.

- After January 2024, the student's form will be processed within 3 days.
- The student will receive a FAFSA Submission Summary. It will include their Student Aid Index (SAI), a number used to determine federal student aid eligibility.
- Schools will use the student's SAI to create their financial aid offer that explains the types and amounts of aid they are offering to the student. Most schools will wait to send the student an aid offer only after they are accepted for admission.

Previous Start FAFSA form

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FAFSA® FORM 2024-25 Parent of Raya Tran Save FAFSA Menu

Provide Consent or the Student Will 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 your section of the student's FAFSA® form. If you don't provide consent, the student 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 the student's eligibility for federal student aid.

Under penalty of law, I certify that I am the individual associated with the FSA ID used to access the FAFSA form to provide the necessary approval and consent for use of my federal tax information (FTI) from the U.S. Department of the Treasury, approve and consent to:

- The U.S. Department of Education to disclose my Social Security number, last four digits of my birth date to the U.S. Department of the Treasury in order to obtain my FTI only for the purpose of determining the eligibility for, and the amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program authorized under subpart 1 of Part 110, Part C, or Part D of Title IV of the *Higher Education Act of 1965*, as amended.
- The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 6103(l)(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** for student to be eligible for federal student aid

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Parent Demographics



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Progress bar: 1 Demographics, 2 Financials, 3 Signature

FAFSA[®] FORM 2024-25 Parent of **Raya Tran** Save FAFSA Menu

Demographics About You

We'll ask about your marital status, college students in your household, and legal residence.

→ This is because most dependent students receive support from their parents, and this affects how much they're able to pay for school.

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FAFSA® FORM 2024-25 Parent of Raya Tran

Save FAFSA Menu

1 Demographics 2 Financials 3 Signature

Parent Current Marital Status

☐ Single (Never Married)

☐ Unmarried and both legal parents living together

☒ Married (not Separated)

☐ Remarried

☐ Separated

☐ Divorced

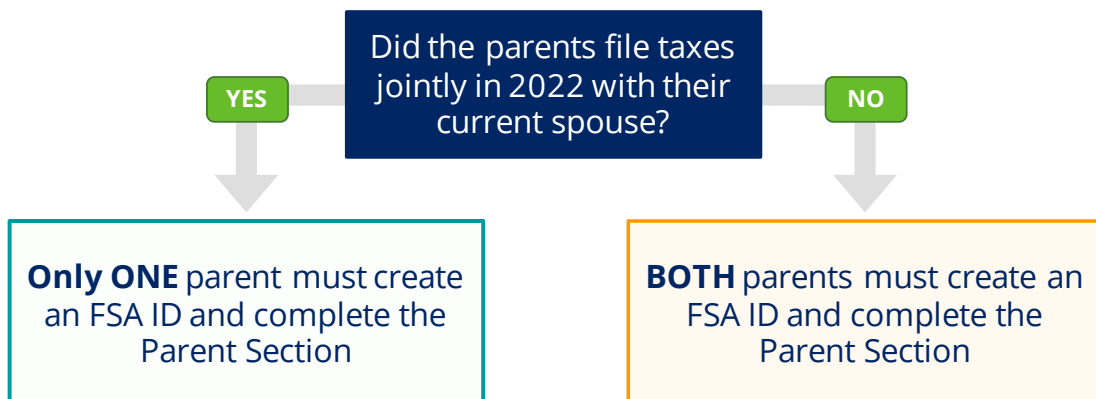
☐ Widowed

Both parents may need FSA IDs depending on their tax filing status

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Who's the contributor?



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Check for Understanding



- Marisa's parents are unmarried and live together. Mom filed as head of household in 2022 and dad filed as single. Who must log in as a contributor to Marisa's FAFSA?

Answer: Both parents

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Check for Understanding



- Rich's parents are married. They were not required to file taxes in 2022. Who must log in as a contributor to Rich's FAFSA?

Answer: Both parents

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Check for Understanding



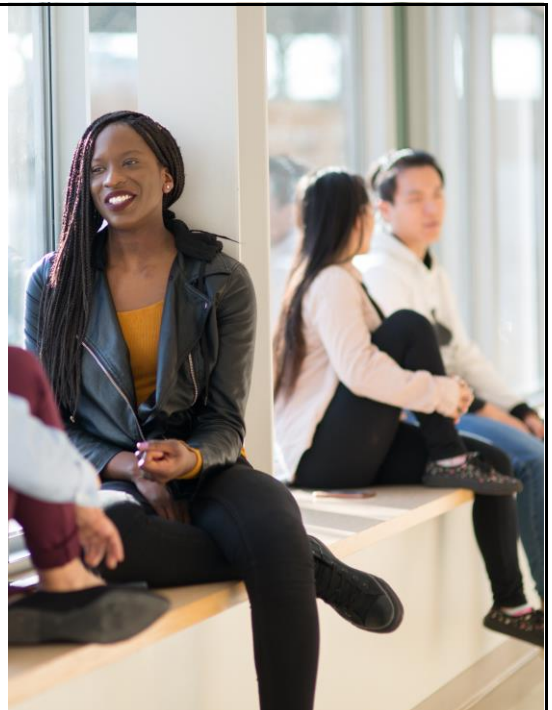
- Rasna's parents are married and filed jointly in 2022. Who must log in as a contributor to Rasna's FAFSA?

Answer: Just one parent

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Parent Financial Information



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Demographics **2** Financials 3 Signature

FAFSA FORM 2024-25 Parent of Raya Tran Save FAFSA Menu

Your Finances

The FAFSA form helps schools determine the student's 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.

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Federal Benefits Received

Responses Don't Affect Federal Student Aid Eligibility
Your answers to these questions will not negatively affect the student's eligibility for federal student aid or these federal benefits.

At any time during 2022 or 2023, did the parent or anyone in their family receive benefits from any of the following federal programs?
Select all that apply:

- ☐ Earned Income Tax Credit (EITC)
- ☐ Federal Housing Assistance
- ☐ Free or Reduced Price School Lunch
- ☐ Medicaid
- ☐ Refundable Credit for Coverage Under a Qualified Health Plan (QHP)
- ☐ Supplemental Nutrition Assistance Program (SNAP)
- ☐ Supplemental Security Income (SSI)
- ☐ Temporary Assistance for Needy Families (TANF)
- ☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- ☐ None of these apply

If the family received any federal benefits in 2022 or 2023, asset questions will be skipped

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Reporting Income



Parent(s) filed taxes, and are able use DDX



Parent(s) filed taxes, and are unable to use DDX



Parent(s) didn't file U.S taxes

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Parent 2022 Tax Return Information

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

Convert all currency to U.S. dollars.

Did the parent receive the Earned Income Tax Credit (EITC)?

☐ Yes

☒ No

☐ Don't know

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

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

\$.00

Foreign Earned Income Exclusion

\$.00

[Previous](#)

Found on **Line 27** on the 1040

If Federal Tax Information was pulled from the IRS, these are the only tax related questions asked

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Reporting Income



Parent(s) filed taxes, and are able use DDX



Parent(s) filed taxes, and are unable to use DDX

Common reasons:

- FSA ID is not verified
- Did not provide consent

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Manual Entry

Parent 2022 Tax Return Information

Refer to the parent's 2022 tax return to answer the following questions.
Convert all currency to U.S. dollars.

Where to find this information on the tax form

Filing Status

☐ Single

☐ Head of household

☐ Married filing jointly

☐ Married filing separately

☐ Qualifying surviving spouse

Utilize help text for accurate completion

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Tax Return Basics


Form 1040	Department of the Treasury—Internal Revenue Service	2022	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.
U.S. Individual Income Tax Return				
Filing Status <input type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately (MFS) <input checked="" type="checkbox"/> Head of household (HOH) <input type="checkbox"/> Qualifying surviving spouse (QSS)				
Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent.				
Your first name and middle initial GABRIELLE		Last name BAKER		Your social security number 876 54 3219
If joint return, spouse's first name and middle initial		Last name		Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions. 1034 MOORE ROAD				Apt. no.
City, town, or post office. If you have a foreign address, also complete spaces below. ANYVILLE				State USA
Foreign country name				ZIP code 02123
Foreign province/state/county				Foreign postal code
Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse				

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Found on
1040 - Line 11

Adjusted Gross Income

\$.00



Chat Your Answer

Income	1a	1b	1c	1d	1e	1f	1g	1h	1i	1j	1k	1l	1m	1n	1o	1p	1q	1r	1s	1t	1u	1v	1w	1x	1y	1z	
	Total amount from Form(s) W-2, box 1 (see instructions)																										43200
	Household employee wages not reported on Form(s) W-2																										
	Tip income not reported on line 1a (see instructions)																										
	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)																										
	Taxable dependent care benefits from Form 2441, line 26																										
	Employer-provided adoption benefits from Form 8839, line 29																										
	Wages from Form 8919, line 6																										
	Other earned income (see instructions)																										
	Nontaxable combat pay election (see instructions)																										
	Add lines 1a through 1h																										43200
	Tax-exempt interest	2a																									
	Qualified dividends	3a																									
	IRA distributions	4a																									
	Pensions and annuities	5a																									
	Social security benefits	6a																									
	If you elect to use the lump-sum election method, check here (see instructions)																										
	Capital gain or (loss). Attach Schedule D if required. If not required, check here																										
	Other income from Schedule 1, line 10																										
	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income																										3500
	Adjustments to income from Schedule 1, line 26																										
	11 Subtract line 10 from line 9. This is your adjusted gross income																										46825
	12 Standard deduction or itemized deductions (from Schedule A)																										19400
	Qualified business income deduction from Form 8995 or Form 8995-A																										
	Add lines 12 and 13																										19400
	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income																										27425

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Reporting Income



Parent(s) filed taxes, and are able use DDX



Parent(s) filed taxes, and are unable to use DDX



Parent(s) didn't file U.S. taxes

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Non-Tax Filers

If taxes weren't filed in 2022, must select a reason

— 37 Parent Tax Filing Status —

[See Notes page 21.]

Did or will the parent file a 2022 IRS Form 1040 or 1040-NR?

☐ Yes ☒ No

If the answer is "No," indicate which one of the following situations applies to the parent for 2022:

► If one of the options in the second column below is selected and the parent is unmarried, questions 38–40 can be skipped.

- ☐ The parent filed or will file a tax return with Puerto Rico or another U.S. territory.
- ☐ The parent filed or will file a foreign tax return.
- ☐ Either the parent earned income in a foreign country but still did not and will not file a foreign tax return or they were an employee of an international organization that did not require them to file a tax return. Such international organizations include, for example, the United Nations, World Bank, and International Monetary Fund.

- ☐ The parent, even though they earned income in the U.S., did not and will not file a U.S. tax return because their income was below the tax filing threshold.
- ☐ The parent did not and will not file a U.S. tax return for reasons other than low income.
- ☐ The parent did not and will not file any tax return because they did not earn any income.

Parent

Manually enter income in US Dollars into FAFSA

Financial section is complete

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Annual Child Support Received
Enter total amount received in child support for the last complete calendar year.

\$.00

Parent Assets
Current Total of Cash, Savings, and Checking Accounts
Don't include student financial aid

\$.00

Current Net Worth of Businesses and Investment Farms
Enter the net worth of your businesses or for-profit agricultural operations. Net worth is the value of your businesses or farms minus any debts owed against them.

\$.00

Current Net Worth of Investments, Including Real Estate
Don't include the home you live in. Net worth is the value of your investments minus any debts owed against them.

\$.00

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NEW: Must report businesses and investment farms of any size

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Reporting Businesses



- Common scenarios:
 - Ride Share (Uber/Lyft)
 - Food Delivery (DoorDash, Grubhub)
 - Other independent contractors
- FSA to release more guidance on how to report other businesses and farms

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Annual Child Support Received

Enter total amount received in child support for the last complete calendar year.

\$.00

Parent Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student financial aid

\$.00

Current Net Worth of Businesses and Investment Farms

Enter the net worth of your businesses or for-profit agricultural operations. Net worth is the value of your businesses or farms minus any debts owed against them.

\$.00

Current Net Worth of Investments, Including Real Estate

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

\$.00

DO Include:

Real estate, mutual funds, money market accounts, CDs, stocks, bonds, 529 Plans

DON'T Include:

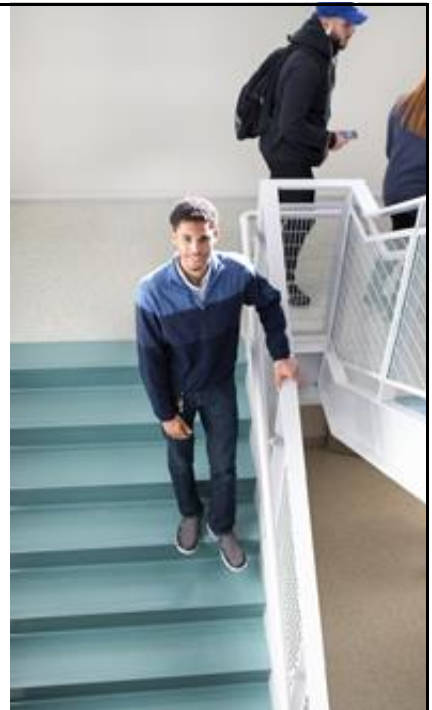
Family home, life insurance, retirement plans

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Family Size



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FAFSA® FORM 2024-25 Parent of Raya Tran

Auto-calculated based on number of individuals claimed on taxes

Family Size

Is the parent's family size different from the number of individuals claimed on their 2022 tax return?

☒ Yes ☐ No

If family size has changed, select yes

The parent's family size is 3
Parent: 1 Other Parent: 1 Student: 1 Parent's Children and Other Dependents: 1


Enter the number of children or other dependents who live with the parent and will receive more than half of their support from the parent between July 1, 2024 and June 30, 2025?
Do not include the student applicant.

1

Include children and other dependents who live with the parent AND whom the parent(s) will support

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 Have the tax return or transcript on hand to check who was claimed

Form 1040 Department of the Treasury—Internal Revenue Service **2022** U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box.
☐ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☒ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Your first name and middle initial GABRIELLE	Last name BAKER	Your social security number 876 54 3219
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions.
1034 MOORE ROAD Apt. no.
City, town, or post office. If you have a foreign address, also complete spaces below.
ANYVILLE State **USA** ZIP code **02123**
Foreign country name Foreign province/state/county Foreign postal code

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☐ No

Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent

Standard Deduction ☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: ☐ Were born before January 2, 1958 ☐ Are blind Spouse: ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions):
If more than four dependents, see instructions and check here ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	Child tax credit	Credit for other dependents
CJ	BAKER	654 32 1987	SON	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Check for Understanding



- Sami lives with their parents and younger sibling. Sami's parents provide most of the financial support for Sami's grandparents who live nearby. What is the parent family size?

Answer: 4 – Sami, parents, sibling

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Check for Understanding



- Brendan's parents are divorced. He lives with his mom. His dad, who recently remarried, provides most of Brendan's financial support. What is the parent family size?

Answer: 3 – Brendan, dad, stepparent

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Check for Understanding



- Nico lives with his dad, uncle, and younger cousin. Nico's dad is currently unemployed, and his uncle supports the entire family financially. What is the parent family size?

Answer: 2 – Nico and dad

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Number in College

Number in college
will no longer impact
the federal formula

Question will still
appear for institutional
aid purposes

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FAFSA® FORM 2024-25 Parent of Raya Tran Save FAFSA Menu

Demographics Financials Signature

Other Parent's Information

Enter the following information about the other parent.

Other Parent

First Name
Travis

Last Name
Tran

Date of Birth
Month Day Year
02 01 1970 ⓘ

Social Security Number (SSN)
***** Show ⓘ

Email Address
travistran@gmail.com

Confirm Email Address
travistran@gmail.com

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If a second contributor is required, they will be invited to complete their section

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Submission & Follow-Up



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FAFSA® FORM 2024-25 Parent of 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.

Parent Contributor Sections

- Introduction Personal Identifiers
- Section 1 Demographics
- Section 2 Financials
- Section 3 Signature

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FAFSA® FORM 2024-25 Parent of Raya Tran

Sign and Complete Your Section

Summary

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

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

By signing the student's application electronically using your account and password, THE PARENT, certify that all of the information you provided is true and correct to the best of your knowledge and you agree, if asked, to provide

- information that will verify the accuracy of your completed form, and
- U.S. or foreign income tax forms that you filed or are required to file.

Once all contributors have completed their section, option to submit

You also certify that you understand that the Secretary of Education has the authority to verify

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Signing and Submitting

- The last contributor to provide information will be able to submit the FAFSA

If parent submits

- Parent will see confirmation page with limited info
- Student will receive email with estimated SAI and federal aid eligibility

If student submits

- Will see full confirmation page with estimated SAI and federal aid eligibility

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FAFSA FORM 2024-25 Parent of Raya Tran Save FAFSA Menu

Congratulations,
the FAFSA Form Is Complete!

Raya Tran
Completion Date 10/12/2024

What Happens Next

- Email sent**
Confirm that the student received an email version of this page.
- The Student Will Receive Notification of Processing**
In one to three days, the student will receive a notification by email that their FAFSA form was processed and sent to the student's schools.
- The Student Will Receive School Communications**
We use the information collected on the student's FAFSA form to calculate their Student Aid Index (SAI). The SAI lets schools determine how much aid the student is eligible to receive. Schools will reach out to the student if they need more information. They will also contact the student with financial aid offers. Once received, the student can contact their financial aid offices directly to ask questions about their student aid packages.

Track and Manage the Student's FAFSA Form
You can check the status of the student's application in the "My Activity" section of your StudentAid.gov account. We will let you know if we need anything more from you.

[View Status](#)

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FAFSA[®] FORM 2024-25

Student **Raya Tran**

FAFSA Menu

Congratulations,
the FAFSA[®] form is complete!

Raya Tran

Completion Date
10/12/2024

Date Release Number
2572

Estimated Student Aid Index
000,000,000

The SAI is NOT a measure of how much student aid you'll receive or how much you'll pay for college. Schools use your SAI to determine your federal student aid eligibility.

Based on the eligibility criteria, you may be eligible for a Federal Pell Grant of up to 000,000.00. You may also be eligible for other federal, state, or institutional grants, scholarships, and/or work-study programs.

What Happens Next

Check Your Email

You will receive an email version of this confirmation page at the following email address: rayaatran@gmail.com.

Receive Notification of Processing

In one to three days, you will receive a notification by email that your FAFSA form was processed and sent to your schools.

You Will Receive School Communications

We use the information collected on your FAFSA form to calculate your Student Aid Index (SAI). The SAI lets schools determine the aid you're eligible to receive. Your schools will reach out to you if they need more information. They will also contact you with your financial aid offers. Once received, you can contact their financial aid offices directly to ask questions about their student aid packages.

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Heads Up: FSS

< Back

3-5 days

FAFSA[®] FORM 2024-25

FAFSA Submission Summary

Student **Raya Tran**

Application Received
Sept. 10, 2024

Application Processed
Sept. 12, 2024

Data Release Number [?]
2572

Eligibility Overview

FAFSA Form Answers

School Information

Next Steps

Estimated Federal Student Aid

Federal Pell Grant [?]

A Federal Pell Grant is awarded to undergraduate students who have financial need and who have not earned a degree or are in a teacher certification program. Federal Pell Grants don't need to be repaid.

Up to **\$4,556**

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Other FAFSA Scenarios



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Parent(s) Starts the FAFSA

**WARNING:**

Must grant consent to remain eligible for federal student aid

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Independent Students

- Mirrors dependent student's experience, but will see additional questions in financial section
 - Family size + Additional tax questions
- If married:

Filed Jointly

Student will provide general demographic information about the spouse

Didn't file Jointly

Student must invite spouse as contributor and provide consent

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What If Income Has Changed?

- The student can submit a **special circumstances** appeal to the financial aid office
- Financial aid administrators can use "professional judgement" to adjust the student's financial aid



SwiftStudent will help you write a financial aid appeal letter - for **free**.



Am I eligible?



What documents do I need?



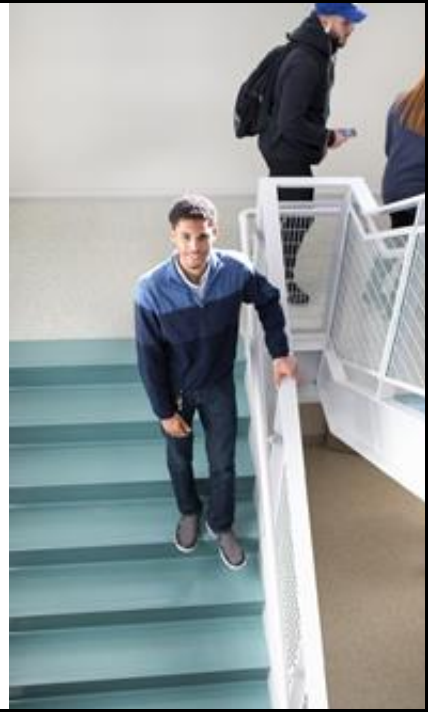
How do I write an appeal letter?



How do I submit my letter to the financial aid office?

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Student Aid Index



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Student Aid Index (SAI)

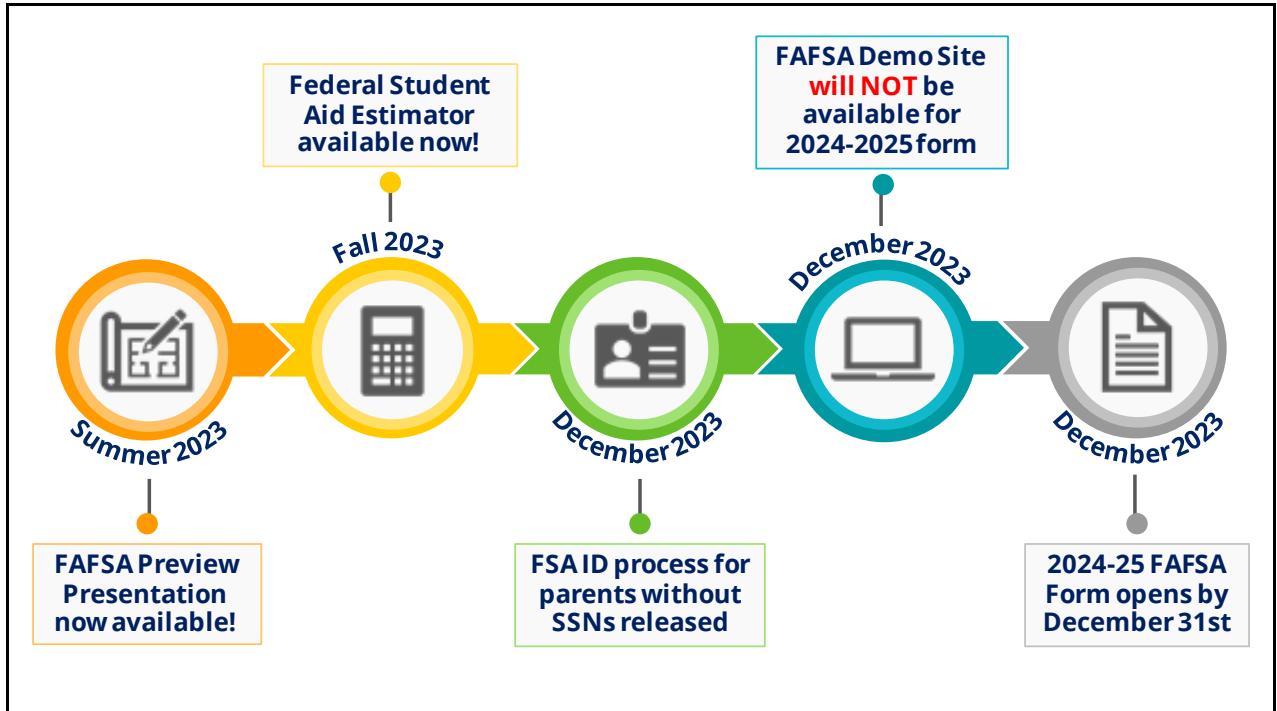
SAI will replace Expected Family Contribution

Used to determine eligibility for federal financial aid

New SAI formula may result in a student receiving a **negative SAI**

Change in formula is expected to **increase** the number of eligible Pell Grant recipients

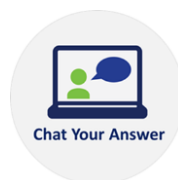
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Share out...

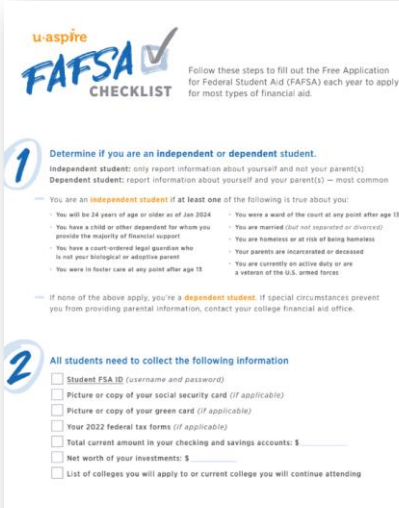
What are some action steps you can take now before the FAFSA opens in December?



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Tool: FAFSA Checklist



u-aspire FAFSA CHECKLIST

Follow these steps to fill out the Free Application for Federal Student Aid (FAFSA) each year to apply for most types of financial aid.

1 Determine if you are an independent or dependent student.

Independent student: only report information about yourself and not your parent(s)
Dependent student: report information about yourself and your parent(s) – most common

— You are an **independent student** if at least one of the following is true about you:

- You will be 24 years of age or older as of Jan 2024
- You have a child or other dependent for whom you provide the majority of financial support
- You have a court-ordered legal guardian who is not your biological or adoptive parent
- You were in foster care at any point after age 18
- You were a ward of the court at any point after age 18
- You are married (but not separated or divorced)
- You are homeless or at risk of being homeless
- Your parents are incarcerated or deceased
- You are currently on active duty or are a veteran of the U.S. armed forces

— If none of the above apply, you're a **dependent student**. If special circumstances prevent you from providing parental information, contact your college financial aid office.

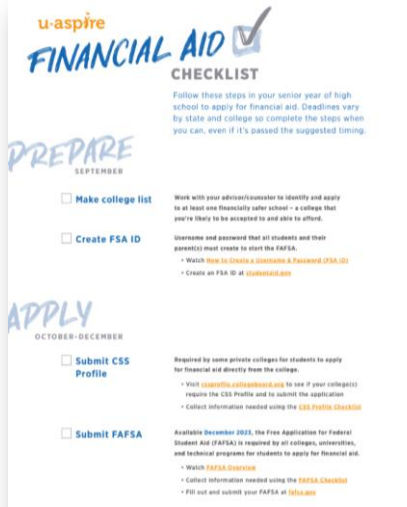
2 All students need to collect the following information

- ☐ Student FSA ID (username and password)
- ☐ Picture or copy of your social security card (if applicable)
- ☐ Picture or copy of your green card (if applicable)
- ☐ Your 2022 federal tax forms (if applicable)
- ☐ Total current amount in your checking and savings accounts: \$ _____
- ☐ Net worth of your investments: \$ _____
- ☐ List of colleges you will apply to or current college you will continue attending



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Tool: Financial Aid Checklist



u-aspire FINANCIAL AID CHECKLIST

Follow these steps in your senior year of high school to apply for financial aid. Deadlines vary by state and college so complete the steps when you can, even if it's passed the suggested timing.

PREPARE
SEPTEMBER

- ☐ **Make college list** Work with your adviser/counselor to identify and apply to at least one financially safer school – a college that you're likely to be accepted to and able to attend.
- ☐ **Create FSA ID** Username and password that all students and their parent(s) must create to start the FAFSA.
 - Watch [How to Create a Username & Password \(FSA ID\)](#)
 - Create an FSA ID at [studentaid.gov](#)

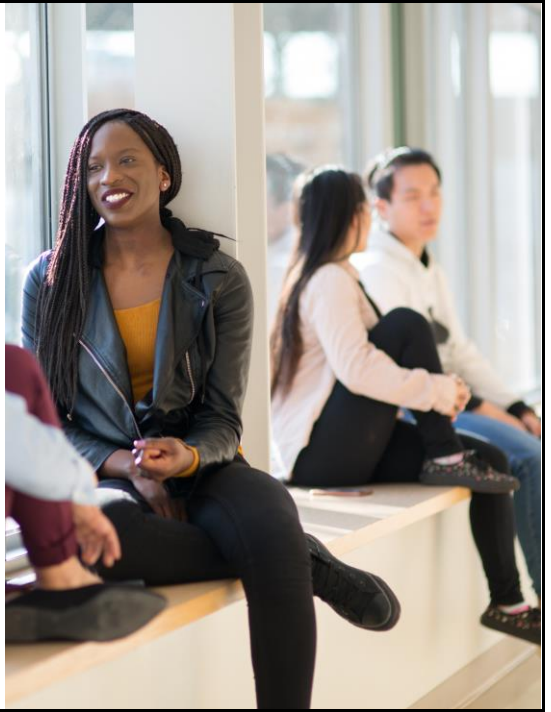
APPLY
OCTOBER-DECEMBER

- ☐ **Submit CSS Profile** Required by some private colleges for students to apply for financial aid directly from the college.
 - Visit [cssprofile.com/apply](#) to see if your college(s) require the CSS Profile and to submit the application
 - Collect information needed using the [CSS Profile Checklist](#)
- ☐ **Submit FAFSA** Available December 2023, the Free Application for Federal Student Aid (FAFSA) is required by all colleges, universities, and technical programs for students to apply for financial aid.
 - Watch [FAFSA Overview](#)
 - Collect information needed using the [FAFSA Checklist](#)
 - Fill out and submit your FAFSA at [studentaid.gov](#)



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Post-Survey & Evaluation



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Post-Survey



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Tools Review



- FSA ID How-to Guide
- FAFSA Checklist
- Financial Aid Timeline
- PPT Slides & Webinar Recording

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FAFSA Resources



Federal Student Aid Knowledge Center

<https://fsapartners.ed.gov/knowledge-center/topics/fafsa-simplification-information>



National College Attainment Network (NCAN)

<https://www.ncan.org/page/better-FAFSA>



National Association of Student Financial Aid Administrators (NASFAA)

https://www.nasfaa.org/fafsa_simplification

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uAspire.org



uAspire's Webinar Series

Free 1-hour webinars for college access professionals



Virtual Financial Aid Events

Presentations and 1:1 support for students and families



Student Resources

Videos, checklists and links to help students navigate the financial aid process



College Cost Calculator

Online tool that helps students compare financial aid offers

To learn more, contact Michelle Murphy: michellem@uaspire.org

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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.

The logo for uAspire, featuring the text "u·aspire" in a white, sans-serif font. The "u" is lowercase and followed by a dot, then "aspire" is lowercase. The logo is positioned on a dark blue triangular background that points towards the bottom right corner of the slide.

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