



*What is your favorite  
summer activity?*



# FAFSA Part 2

PA Department of Education

# About Your Trainer



Kassie Sweatt (she/her)

*Training Specialist*

- Former uAspire Advisor & Project Coordinator
- First generation college student
- 2024 Reading goal = 75 books

# Agenda

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

# 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

# Pre-Survey



# FAFSA Part One Recap

FSA ID

Dependency

Who is the  
parent?

Student  
Financial Section

# Parent Walkthrough



## Help Complete Raya's Form

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

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





## Log In

Email, Phone, or FSA ID Username

Password

[Show Password](#)

Log In

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

[Create an Account](#)

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

Every contributor must have an FSA ID

## Parent Contributing to the FAFSA® Form

You have entered **Raya 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.

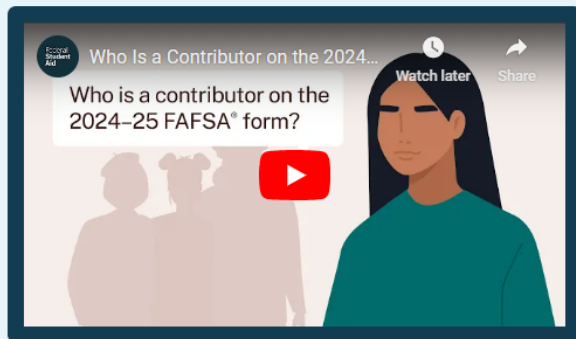
Answers on the student's FAFSA form have indicated that you will need to provide additional information as a contributor to help determine their eligibility for federal student aid.

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

## Understanding the FAFSA® Form

2 of 4

### Contributors to the FAFSA® Form



#### Parents or Spouses

Answers to the FAFSA form will determine if any contributors need to be identified. These contributors will complete their own sections of the form and are asked to provide personal and financial information, but will not become financially responsible for the student's education.

#### How To Invite

Contributors will need to log in with their own FSA ID to provide their information. To invite a contributor to a FAFSA form, you'll need to provide their name, date of birth, Social Security number, and email address.

[Information or Documents You May Need](#) ▾

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Continue

Parents will not see any student information

## 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<sup>®</sup> 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 name, birth 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 A, 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(1)(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

# Parent Demographic s



1

Demographics


2

Financials

3

Signature

**FAFSA**<sup>®</sup>  
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.



Previous

Continue

1 Demographics

2 Financials

3 Signature

### Parent Current Marital Status

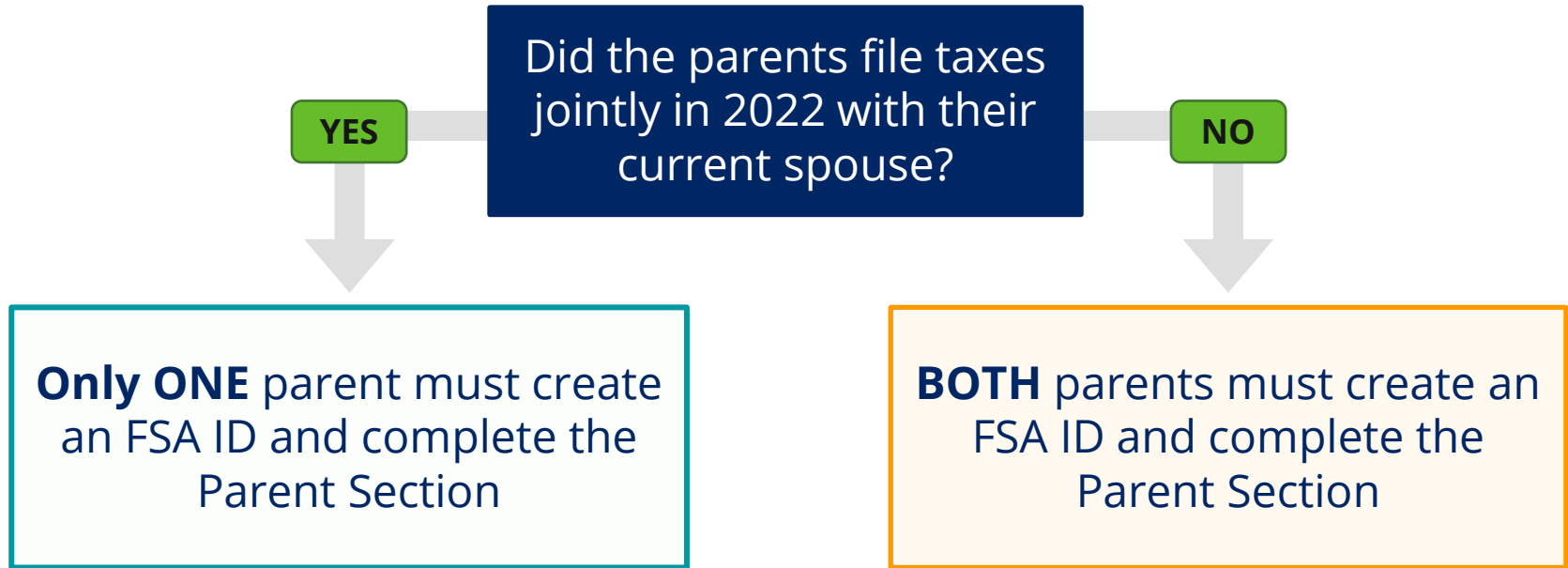
- Single (Never Married)
- Unmarried and both legal parents living together
- Married (not Separated)
- Remarried
- Separated
- Divorced
- Widowed

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

Previous

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# Who's the contributor?





Demographics

2  
Financials

3  
Signature

## Other Parent's Information

Enter the following information about the other parent.



### Parent Spouse or Partner

First Name ⓘ

Travis

Last Name ⓘ

Tran

Date of Birth ⓘ

Month Day Year  
02 01 1970

Social Security Number (SSN) ⓘ

•••••1234 SHOW SSN

The parent spouse or partner doesn't have an SSN.

Email Address ⓘ

travistran@gmail.com

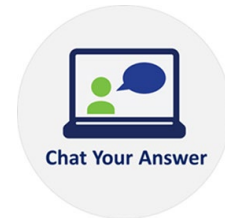
Confirm Email Address ⓘ

travistran@gmail.com

Send Invite

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

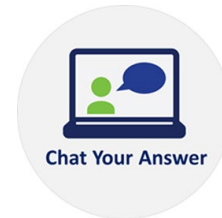
# Check for Understanding



- 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**

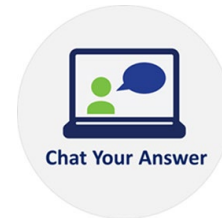
# Check for Understanding



- 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**

# 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**

# Parent Financial Information





Demographics


2

Financials


3

Signature

**FAFSA**<sup>®</sup>  
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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Continue

# 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**

## Parent 2022 Tax Return Information

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

Convert all currency to U.S. dollars

Did the parent receive the Earned Income Credit (EIC)? ⓘ

Yes

No

Don't know

Found on **Line 27** on the 1040

Amount of College Grants, Scholarships, or AmeriCorp Benefits Reported as Income to the IRS

*The parent paid taxes on these grants, scholarships, or benefits. These usually apply to those renewing their FAFSA® form, not to first-time applicants. If married, include amount parent's spouse/partner received.*

\$  .00 ⓘ

Foreign Earned Income Exclusion

\$  .00 ⓘ

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



# 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

# 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

# Tax Return Basics

Form **1040**

Department of the Treasury—Internal Revenue Service

**U.S. Individual Income Tax Return**

**2022**

OMB No. 1545-0074

IRS Use Only—Do not write or staple in this space.

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  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

ZIP code

02123

Foreign country name

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.

You  Spouse

Found on  
**1040 - Line 11**

## Adjusted Gross Income

\$		.00
----	--	-----



Income						
	<b>1a</b>	Total amount from Form(s) W-2, box 1 (see instructions)		<b>1a</b>	43200	
	<b>b</b>	Household employee wages not reported on Form(s) W-2		<b>1b</b>		
	<b>c</b>	Tip income not reported on line 1a (see instructions)		<b>1c</b>		
	<b>d</b>	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)		<b>1d</b>		
	<b>e</b>	Taxable dependent care benefits from Form 2441, line 26		<b>1e</b>		
	<b>f</b>	Employer-provided adoption benefits from Form 8839, line 29		<b>1f</b>		
	<b>g</b>	Wages from Form 8919, line 6		<b>1g</b>		
	<b>h</b>	Other earned income (see instructions)		<b>1h</b>		
	<b>i</b>	Nontaxable combat pay election (see instructions)	<b>1i</b>			
	<b>z</b>	Add lines 1a through 1h		<b>1z</b>	43200	
Attach Sch. B if required.	<b>2a</b>	Tax-exempt interest	<b>2a</b>	<b>b</b> Taxable interest	<b>2b</b> 125	
	<b>3a</b>	Qualified dividends	<b>3a</b>	<b>b</b> Ordinary dividends	<b>3b</b>	
<b>Standard Deduction for—</b> <ul style="list-style-type: none"> <li>• Single or Married filing separately, \$12,950</li> <li>• Married filing jointly or Qualifying surviving spouse, \$25,900</li> <li>• Head of household, \$19,400</li> <li>• If you checked any box under <i>Standard Deduction</i>, see instructions.</li> </ul>	<b>4a</b>	IRA distributions	<b>4a</b>	<b>b</b> Taxable amount	<b>4b</b>	
	<b>5a</b>	Pensions and annuities	<b>5a</b>	<b>b</b> Taxable amount	<b>5b</b>	
	<b>6a</b>	Social security benefits	<b>6a</b>	<b>b</b> Taxable amount	<b>6b</b>	
	<b>c</b>	If you elect to use the lump-sum election method, check here (see instructions)		<input type="checkbox"/>		
	<b>7</b>	Capital gain or (loss). Attach Schedule D if required. If not required, check here		<input type="checkbox"/>	<b>7</b>	
	<b>8</b>	Other income from Schedule 1, line 10			<b>8</b>	3500
	<b>9</b>	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your <b>total income</b>		<b>9</b>	46825	
	<b>10</b>	Adjustments to income from Schedule 1, line 26		<b>10</b>		
	<b>11</b>	Subtract line 10 from line 9. This is your <b>adjusted gross income</b>		<b>11</b>	46825	
	<b>12</b>	<b>Standard deduction or itemized deductions</b> (from Schedule A)		<b>12</b>	19400	
	<b>13</b>	Qualified business income deduction from Form 8995 or Form 8995-A		<b>13</b>		
	<b>14</b>	Add lines 12 and 13		<b>14</b>	19400	
	<b>15</b>	Subtract line 14 from line 11. If zero or less, enter -0-. This is your <b>taxable income</b>		<b>15</b>	27425	

# 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**

## Parent Tax Filing Status

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

Yes

No

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

Indicate which one of the following situations applies to the parent for 2022.

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 did not and will not file a foreign tax return, or they were an employee of an international organization but not required to report their income on any tax return.

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.

Manually enter income in US Dollars into FAFSA

Financial section is complete

## Federal Benefits Received

### Questions Don't Affect Federal Student Aid Eligibility

Your answers to these questions will not 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 Credit (EIC) ⓘ
- 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

## Annual Child Support Received

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

 ⓘ

## Parent Assets

**Current** Total of Cash, Savings, and Checking Accounts

*Don't include student financial aid.*

 ⓘ

**Current Net Worth of Investments, Including Real Estate**

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

 ⓘ

**Current Net Worth of Businesses and Investment Farms**

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

 ⓘ

**DO Include:** Real estate, mutual funds, money market accounts, CDs, stocks, bonds, 529 Plans

**DON'T Include:** Family home, life insurance, retirement plans

**NEW:** Must report businesses and investment farms of any size



# Reporting Businesses



- Independent Contractors:
  - Ride Share (Uber/Lyft)
  - Food Delivery (DoorDash, Grubhub)
  - Other employees who receive a 1099
- Other businesses (restaurants, farms, etc)
  - Net worth = Value of business - debts

# Family Size



## Family Size

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

*Family size includes: The parent (and their spouse), The student, other people, if they live with the parent and the parent will provide more than half of their support between July 1, 2024, and June 30, 2025. This includes dependent children who meet these criteria, even if they live apart because of college enrollment.*

Yes

No

*Based on answers to previous questions, we've made some assumptions about your family. The student and the student's parent (and parent's spouse, if married) are always included in the family size. The box below shows your family sized based on our assumptions and the number of children or other dependents you report.*



The parent's family size is 2.

Parent: 1   Student: 1   Parent's Children and Other Dependents: 0

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.*

ⓘ

If family size has changed, select yes

Auto-calculated based on number of individuals claimed on taxes

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



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

Form **1040**

Department of the Treasury—Internal Revenue Service

## U.S. Individual Income Tax Return

**2022**

OMB No. 1545-0074

IRS Use Only—Do not write or staple in this space.

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household (HOH)  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 <b>GABRIELLE</b>	Last name <b>BAKER</b>	Your social security number <b>876   54   3219</b>
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. <b>1034 MOORE ROAD</b>		Apt. no.	<b>Presidential Election Campaign</b> 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
City, town, or post office. If you have a foreign address, also complete spaces below. <b>ANYVILLE</b>		State <b>USA</b>	
Foreign country name		ZIP code <b>02123</b>	
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

**Standard Deduction** **Someone can claim:**  You as a dependent  Your spouse as a dependent  
 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

If more than four dependents, see instructions and check here <input type="checkbox"/>	(1) First name		(2) Social security number			(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	
	Last name					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"/>

# 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**

# 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**

# 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**

# Number in College

The screenshot shows the FAFSA 2024-25 interface for a 'Parent of Sample Student'. At the top, there is a progress bar with three steps: 'Demographics' (completed), 'Financials' (current step), and 'Signature'. The 'Number in College' question is displayed, asking for the number of people in the family (excluding parents) who will be in college between July 1, 2024, and June 30, 2025. A text input field contains the number '1'.

FAFSA<sup>®</sup> FORM 2024-25 Parent of Sample Student Save FAFSA Menu

Demographics Financials Signature

### Number in College

Out of the 2 people in the parent's family, how many will be in college between July 1, 2024, and June 30, 2025?

*Do not include parent(s).*

Number in college **will no longer** impact the federal formula

Question will still appear for institutional aid purposes



# Submission & Follow-Up



### 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

Expand All



Introduction  
**Personal Identifiers**



Section 1  
**Demographics**



Section 2  
**Financials**



Section 3  
**Signature**



Previous

Continue



## Sign and Complete Your Section

### Summary

This page confirms that you understand the terms and conditions of the FAFSA<sup>®</sup> 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 user ID and password (FSA ID). Because your FSA ID is associated with your personal information, we will not share it with anyone.

By signing the student's application electronically using your account user ID 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

# 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

## Congratulations, the FAFSA<sup>®</sup> 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<sup>®</sup> 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](#)

## Congratulations, the FAFSA<sup>®</sup> 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.

# Heads Up: FSS

3-5 days

[< Back](#)


**FAFSA**<sup>®</sup> 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**

# Tool: Parent's Guide

u·aspire

## A Parent's Guide to the Parent Section of FAFSA


Starting with the 2024-2025 FAFSA, students and parents must log into the application separately and complete their own sections. If your child has already completed their section, they will need to invite you to be a "contributor" on their FAFSA. Follow these steps to complete your required section of the FAFSA .

- Gather needed information, including your 2022 tax returns (if applicable)**
  - Fill out uAspire's FAFSA Checklist to learn about the information you'll need
- Create an FSA ID if you do not already have one**
- Check your email to find the invitation to contribute information to your child's FAFSA**
  - Or you can go directly to [studentaid.gov](https://studentaid.gov) and log in with your FSA ID
  - Check your "My Activity" dashboard for the invitation and select "Get Started" to begin filling out your section

**!** **If you don't receive an email or see the invitation to be a contributor in your dashboard:**

- Double check that the email has not been sent to spam or the junk folder
- Confirm which email address invitation was sent to
- Ask your child to log back into their FAFSA and make sure they inputted your name, date of birth, social security number (if applicable), and mailing address correctly

- Provide consent for the IRS to transfer your data directly into the FAFSA**
  - **You MUST provide consent in order for your child to be eligible for federal financial aid.** You will be asked to provide consent after reviewing the Parent Identity Information.
- Answer the questions on the form**
  - Click the question mark icon when you need help answering a question.
  - Reach out to your child's uAspire advisor or email [studentsupport@uaspire.org](mailto:studentsupport@uaspire.org) for additional support.
- Sign and submit the FAFSA after reviewing the Summary Page for accuracy**
  - Your student will receive a confirmation email with next steps.

 uAspire 2023





# Other FAFSA Scenarios



# Parent(s) Starts the FAFSA

Parent can start the FAFSA and invite the student to contribute



Student must create an FSA ID & provide consent



DDX will transfer federal tax information from the IRS



## **WARNING:**

*Must grant consent to remain eligible for federal student aid*

# Independent Students

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

## Filed Jointly

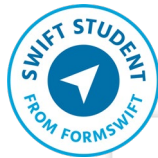
Student will provide general demographic information about the spouse

## Didn't file Jointly

Student must invite spouse as contributor and provide consent

# 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?

# Student Aid Index



# 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**

# 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 were a ward of the court at any point after age 13
- You have a child or other dependent for whom you provide the majority of financial support
- You are married (*but not separated or divorced*)
- You have a court-ordered legal guardian who is not your biological or adoptive parent
- You are homeless or at risk of being homeless
- You were in foster care at any point after age 13
- 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



# 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 advisor/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 afford.

**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.collegeboard.org](#) 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 [fafsa.gov](#)





# Post-Survey & Evaluation



# Post-Survey



# Tools Review



- FSA ID How-to Guide
- Parent & FSA ID Flowchart
- Parent's Guide to the Parent Section
- FAFSA Checklist
- Financial Aid Timeline
- PPT Slides & Webinar Recording

# 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](https://www.nasfaa.org/fafsa_simplification)

# 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](mailto:michellem@uaspire.org)*

# Financial Aid Help Videos



**uAspire**

@uaspire3600 · 196 subscribers · 124 videos

uAspire is a nonprofit organization ensuring that all young people have the financial inform... >

[uaspire.org](https://uaspire.org) and 2 more links

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Massachusetts Universal FAFSA Briefing  
January 2024

32 views · 5 days ago



Parent Identity Info on the 24-25 FAFSA

19 views · 5 days ago



Can a parent start the 24-25 FAFSA?

9 views · 5 days ago



How to submit the 24-25 FAFSA

7 views · 5 days ago



# uAspire Help Desk

Students can text the uAspire help desk number anytime. A uAspire Advisor texts back within 24 hours business hours to help them complete the FAFSA and other financial aid steps over text, Zoom, or phone.

**Text 313 -PA-FAFSA  
or 313-723-2372**



# FAFSA Support

PA Department Of Education and uAspire have partnered to provide students with Financial Aid Assistance

## Need help with the FAFSA?

Text the help desk anytime. A uAspire Advisor will respond within 24 business hours to help you complete the FAFSA and answer your questions.

**Text 313 -PA-FAFSA  
or 313-723-2372**



# Ayuda Para la FAFSA

El Departamento de Educación y uAspire han colaborado para apoyar los estudiantes de Pennsylvania con las aplicaciones de ayuda financiera.

## Necesitas ayuda con la aplicación de FAFSA?

Envía un mensaje de texto al servicio de ayuda en cualquier momento. Un consejero de uAspire responderá dentro de las 24 horas para ayudar a completar la FAFSA y responder sus preguntas.

**313 -PA-FAFSA o  
313-723-2372**





# How the uAspire Help Desk Works

- ✔ Student/parent/partner sends a text to the uAspire help desk. The first text can be anything such as a “hello”, or a question.
- ✔ They will receive an auto-response to thank them and a request to agree to the uAspire Privacy Policy
- ✔ 3 more automated questions: First Name, Last Name, Most recent high school attended. *Counselors and other partners should answer these questions too!*  
Once they respond they will get a text that says a uAspire advisor will reach back within 24 hours (if a weekend or holiday, please give us a bit more time). **Note:** *The uAspire Help Desk is closed the week of 7/2 due to the holiday week.*
- ✔ The uAspire advisor will then take the conversation from there, answering questions via text, sharing resources, and offering up additional support such as a Zoom meeting as needed
- ✔

# Evaluation and Questions



# Thank You!



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