



What are your 2024 resolutions/goals?



FAFSA Part 1

MOCAN

About Your Trainer



Kassie Sweatt (she/her)

Training Specialist

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



Agenda

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

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10

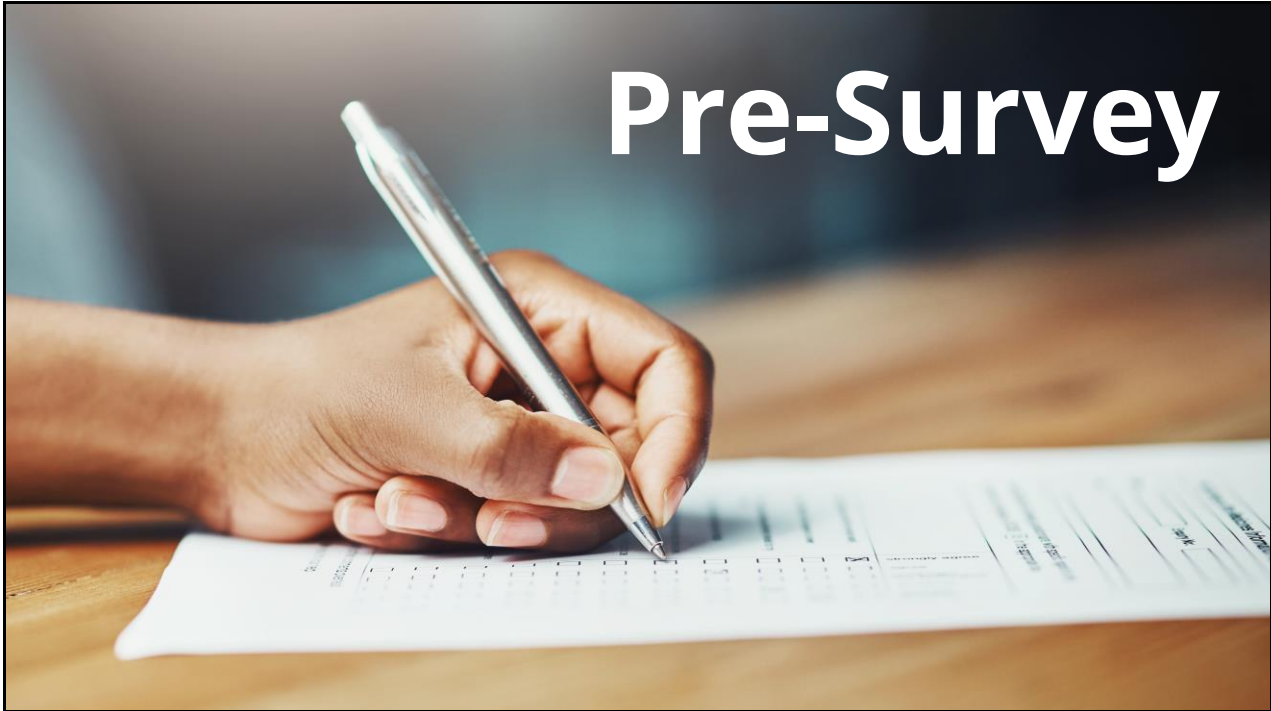
Learning Objectives

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

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11



12



14

Major Changes



- 2024-25 FAFSA is now open
- FSA ID required for all users
- Role-based completion
- **IRS Direct Data Exchange (DDX)** replaced Data Retrieval Tool (DRT)
- **Student Aid Index (SAI)** replaced Expected Family Contribution (EFC)

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15

Contributors & FSA ID



17

What's a Contributor?



- Anyone who is required to provide information on the FAFSA



- Every contributor needs an **FSA ID** to access the FAFSA

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18

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

555-432-4567 Verified



Email Verification

john.doe.original@gmail.com Verified



Authenticator App



Verified



Your authenticator app can now be used to log in.

19

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

20

Manual Documentation



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

Attestation Form

*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

21

Tool: FSA ID How-to Guide

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FSA ID How-to guide
 Creating an FSA ID is the first step in completing the FAFSA

What is an FSA ID?
 The Federal Student Aid (FSA) ID is a **username and password** that is required to log in and access all Federal Student Aid websites, including the FAFSA. The FSA ID also serves as a **legal signature** when you submit your FAFSA.

Who should create an FSA ID?
 You and **one or both of your parents** must create an FSA ID **before** completing the FAFSA. If you are an independent student, you will not need to have your parent or legal guardian create an FSA ID. If you have a sibling who attended college before you, your parent may already have an FSA ID.

Starting in Fall 2023, every person contributing information to a FAFSA will need an FSA ID - **including parents who do not have a social security number**

What information do I need to create an FSA ID?

- Full name and social security number, as they appear on social security card (if applicable)
- Date of birth
- Valid email address & phone number
- Immediate access to your email account
- Your residential address

Go to studentaid.gov and click "create account" in the upper right hand corner. The application is available in English and Spanish.

Save your FSA ID username and password somewhere safe.

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25

Dependent Student Walkthrough



26

An official website of the United States government.

Help Center Submit a Complaint English | Español

Federal Student Aid
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FAFSA® Form ▾ Loans and Grants ▾ Loan Repayment ▾ Lo

Available in English and Spanish

A Better 2024-25 FAFSA Form

The FAFSA form is available for short periods of time while we monitor site performance and update the form to provide you with a better experience. [Learn more about the 2024-25 FAFSA form.](#)

2024-25 FAFSA® Form

Start New Form Access Existing Form

Need to access last year's form? [Start or Edit a 2023-24 FAFSA Form](#)

FAFSA® form

27

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Please Wait

NEW

Some users may experience a waiting room feature

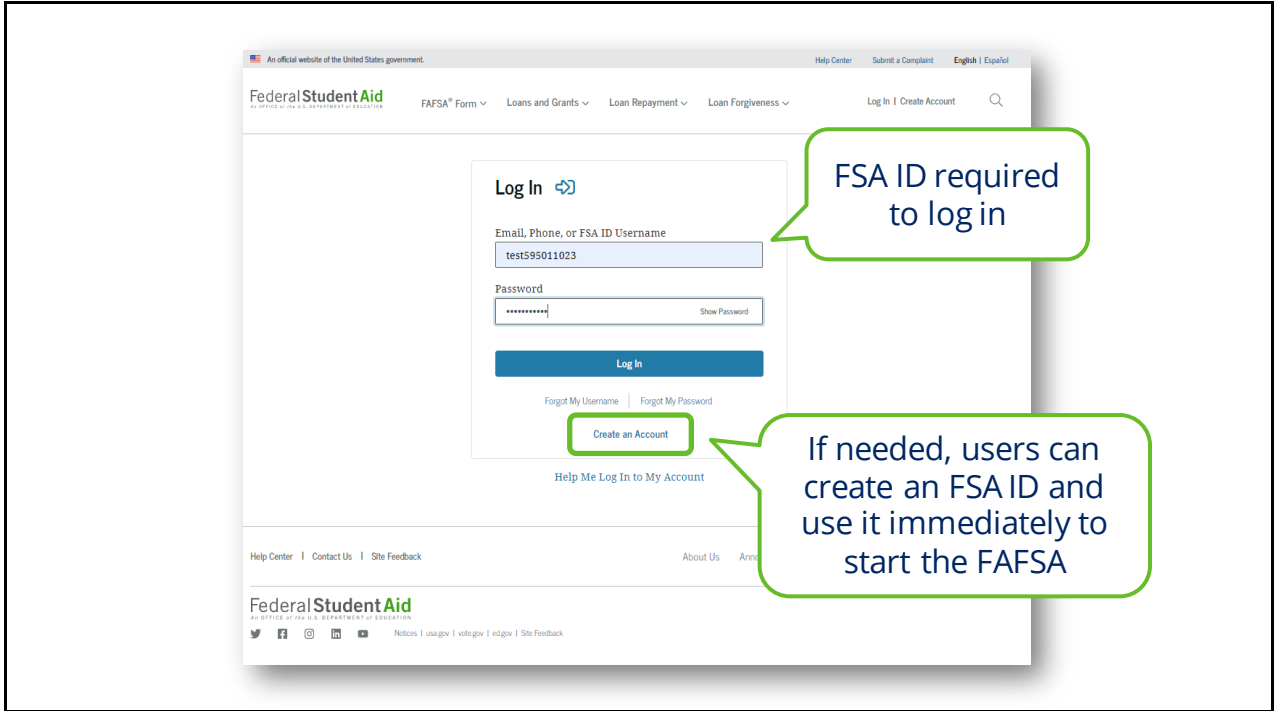
StudentAid.gov is busier than normal. You'll be able to proceed to the site shortly. Thanks for your patience!

[Learn about the 2024-25 FAFSA form.](#)

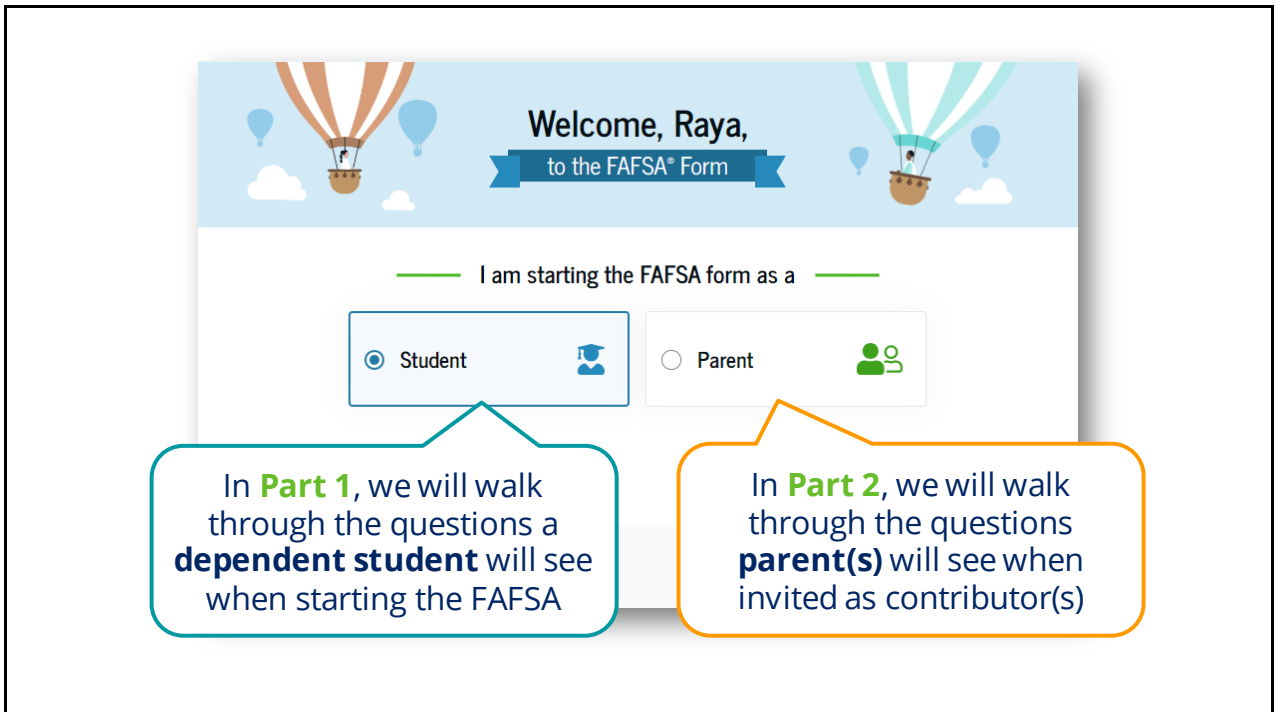
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usa.gov | ed.gov

28



29



30

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

NEW

Onboarding pages provide an overview of the FAFSA process

31

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

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

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

33

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.

NEW

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. I approve and consent to:

- The U.S. Department of Education and the U.S. Department of Health and Human Services (HHS) to transmit my federal tax information to the U.S. Department of Education for determining the eligibility for federal student aid for which I participated and shared my federal tax information by a program, C, or Part D of Title IV of the Higher Education Act of 1965 (20 U.S.C. 10901-10906).
- The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 6103(d)(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 transmitted automatically from the IRS

34

Personal Circumstances

36

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

37

Please chat in...



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



38

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 than half their support from them

Are an unaccompanied youth who is homeless

40

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.

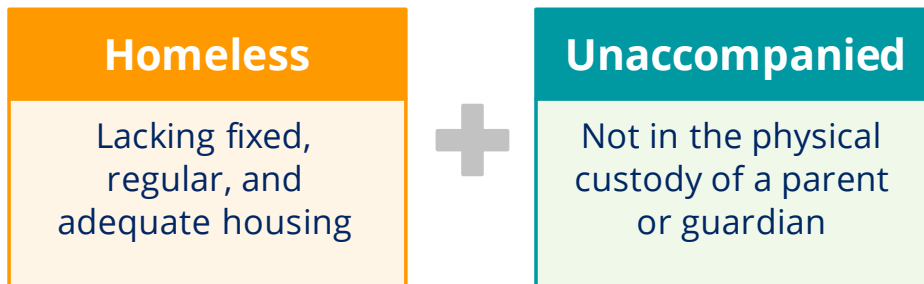


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43

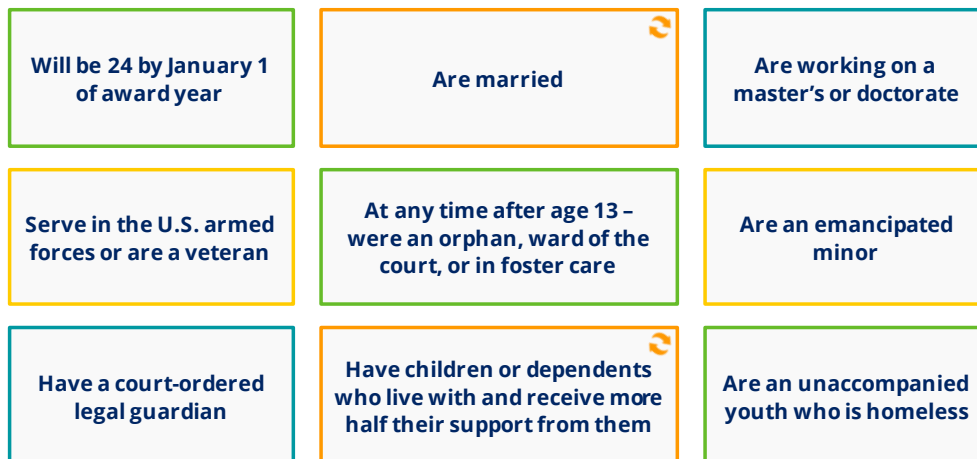
Determining Homelessness

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



44

A student is independent if they:



45

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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47

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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49

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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50

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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51

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 student may be experiencing unusual circumstances if they

- left home due to an abusive or threatening environment;
- are abandoned by or estranged from their parents;
- have refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country;
- are a victim of human trafficking;
- are incarcerated, or their parents are incarcerated and contact with the parents would pose a risk to the student; or
- are otherwise unable to contact or locate their parents.

If the student's circumstances resulted in not having a safe and 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

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



52

Student Dependency Status



Dependent Student

The student is a dependent student. This means information about the student's parent(s) must be provided on the FAFSA® form. This information helps determine how much federal student aid the student is 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? ⓘ

If you select "Yes," a financial aid administrator at the student's school will determine their eligibility for a Direct Unsubsidized Loan only.

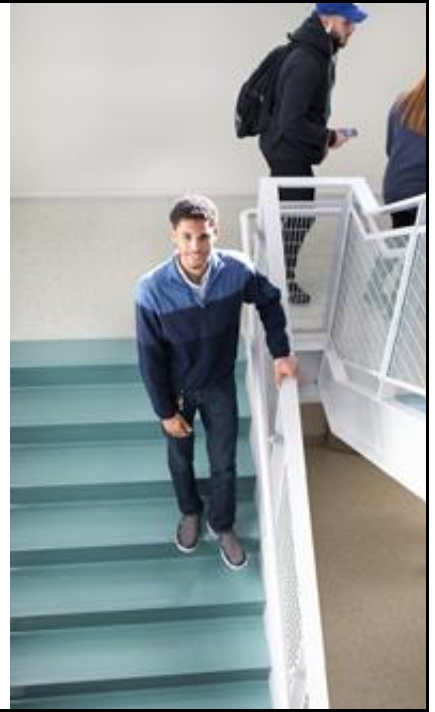
Yes

No

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

53

Parent Information



54

Who is My Parent?



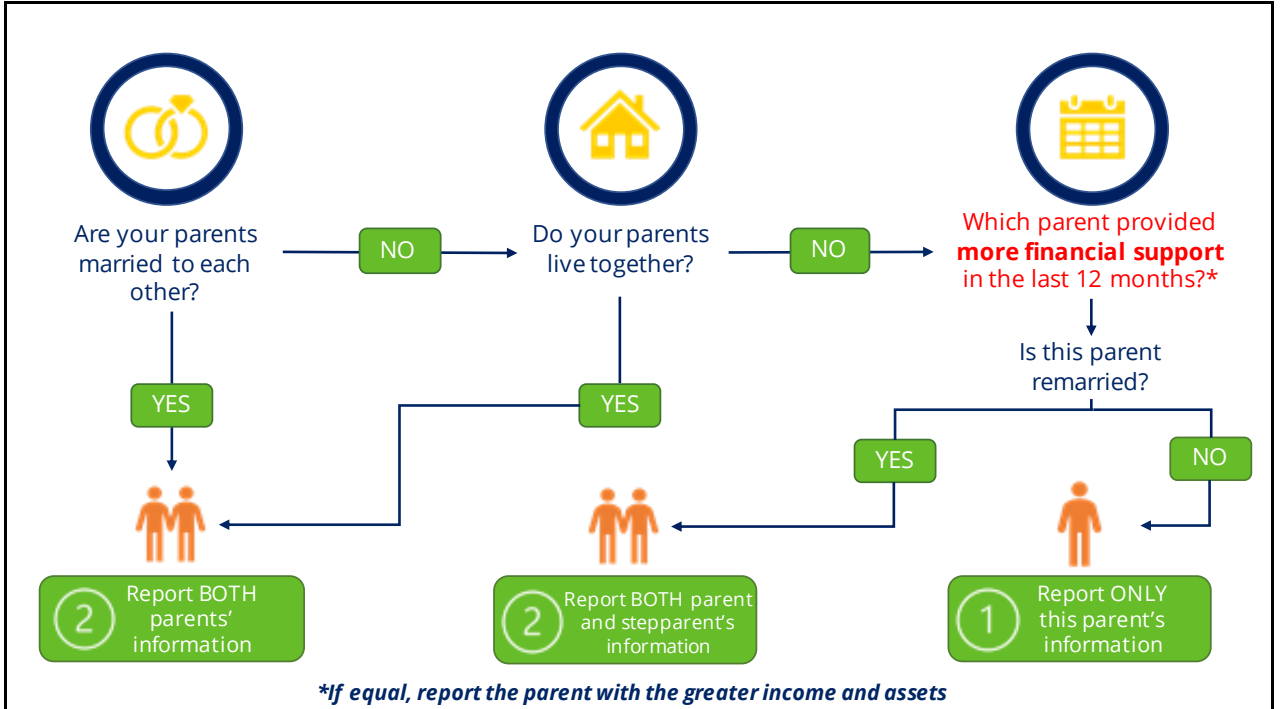
- A series of questions will help determine who is the parent on the FAFSA
- “Parents” are legal (biological or adoptive) parent



*Determine contributor(s)
before starting the FAFSA*

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55



56

Check for Understanding



- Mario 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 Mario's FAFSA?

Answer: Both parents

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58

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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59

Check for Understanding



- Kim is living with her grandparents who support her financially. She is in contact with her parents who live outside the country.

Answer: Parents

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62

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).

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

If parent(s) lives outside of the US, they can enter Foreign Country

Parent

Social Security Number (SSN) Hide

My parent doesn't have an SSN.

Address

City

State

Zip Code

Country

Send Invite

First Name

Last Name

Date of Birth
 Month Day Year

Social Security Number (SSN) Hide

My parent doesn't have an SSN.

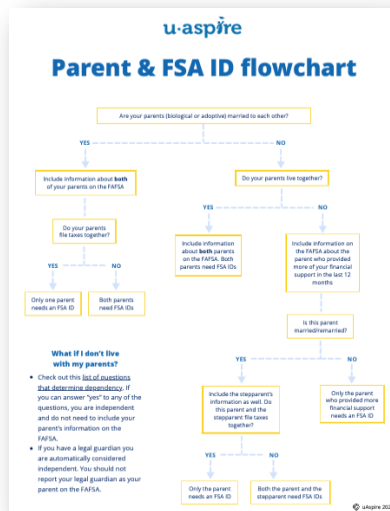
Email Address

Confirm Email Address

Send Invite

63

Tool: Parent & FSA ID Flowchart

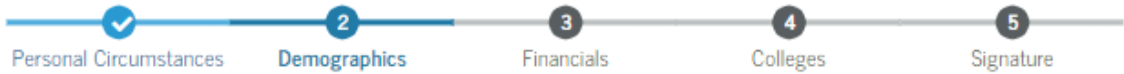


64

Student Demographics



66



FAFSA[®]
FORM
2024-25

Student **Raya Tran**

Save

FAFSA Menu

Student Demographics

We'll ask questions about you and your parent(s). Some of these questions will help determine how much federal student aid you may be eligible to receive for school.



Previous

Continue

67

Student Demographic Information

Questions Used for Research Purposes Only and Do Not Affect Federal Student Aid Eligibility

Your answers will not

- 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.

What is the student's gender?

Male

Female

Nonbinary or another gender

Prefer not to answer

Demographic survey questions will **NOT** impact eligibility

It's okay to select "Prefer not to answer"

68

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

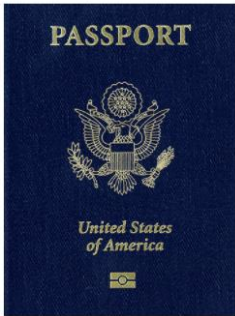
Neither U.S. citizen nor eligible noncitizen

How should students answer this question?

Previous Continue

70

U.S. Citizen or National



71

Eligible Noncitizen

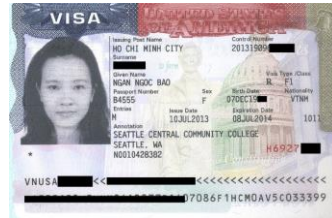
- U.S. permanent residents
- Individuals with an I-94 showing: Refugee, Asylee, Cuban-Haitian Entrant, or Parolee
- Victims of human trafficking (T-Visa)
- Battered immigrants and children



72

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



73

Tips for Undocumented Students

- Contact colleges about institutional aid
- Apply for scholarships



75

Financial Information



78

A screenshot of the FAFSA 2024-25 application interface. At the top left, it says 'FAFSA FORM 2024-25' and 'Student Raya Tran'. At the top right, there are 'Save' and 'FAFSA Menu' options. The main heading is 'Your Finances'. Below it, a text box explains: '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.' To the right of the text is an illustration of a person in a teal hoodie pointing at a screen with dollar signs. At the bottom, there are 'Previous' and 'Continue' buttons.

79

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

81

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

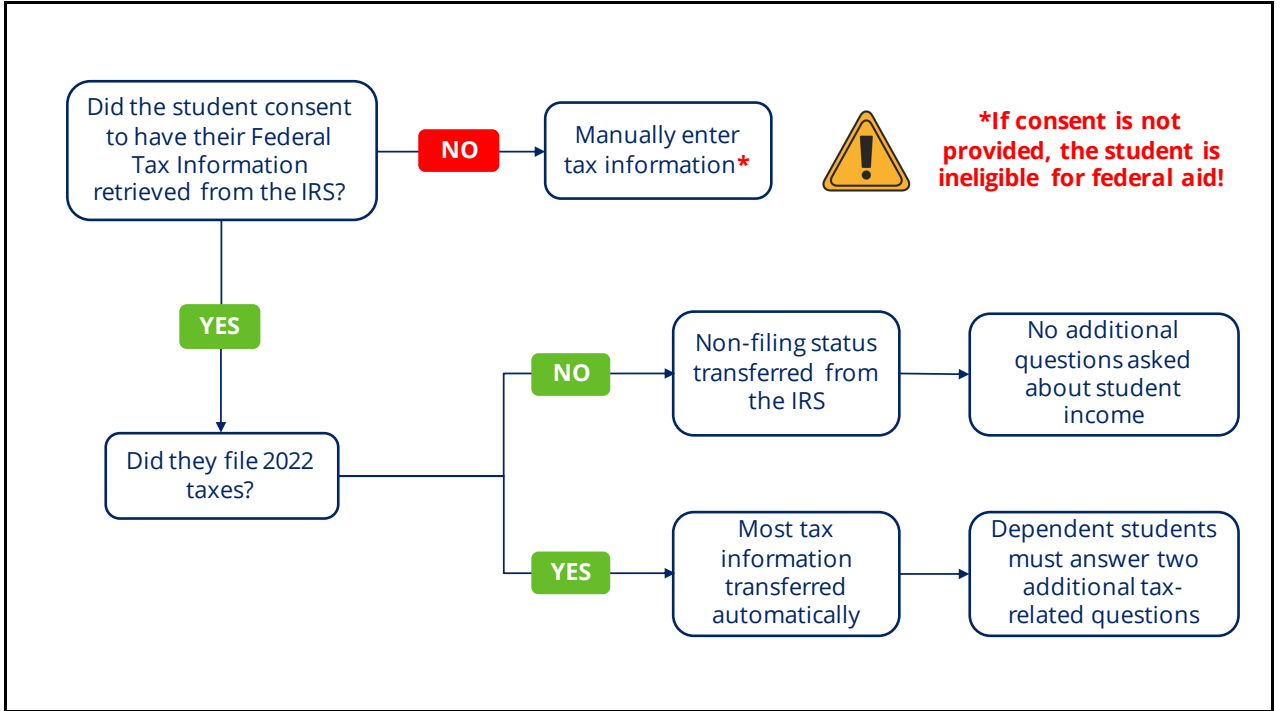
How would I know if DDX worked?

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

Let's take a look...

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83



84

Student Tax Questions

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

The student 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 student's spouse received.

\$

Found on Schedule 1 Line - 8r

Foreign Earned Income Exclusion

\$

Found on Schedule 1 Line - 8d

85

Student Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student financial aid.

\$

①

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.

\$

①

Current Net Worth of Businesses and Investment Farms

Enter the net worth of the student's businesses or for-profit agricultural operations minus any debts owed against them.

\$

①

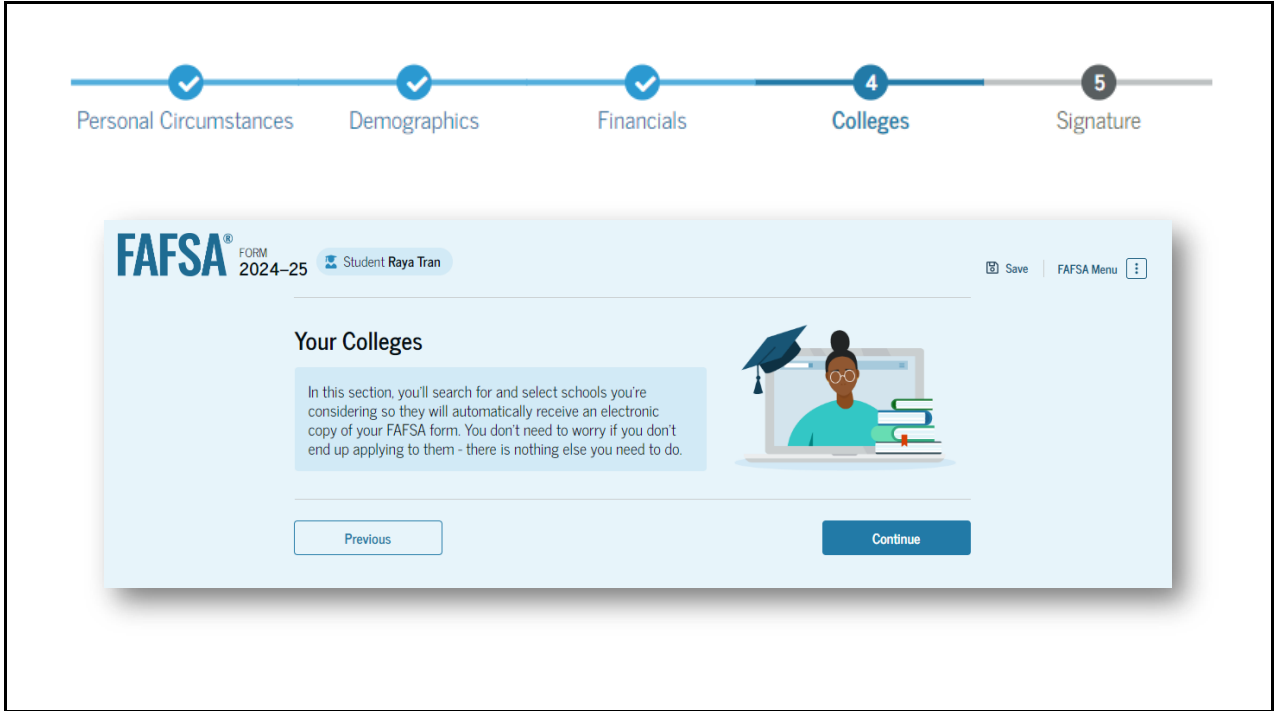
Asset information is required if family AGI is more than \$60,000

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

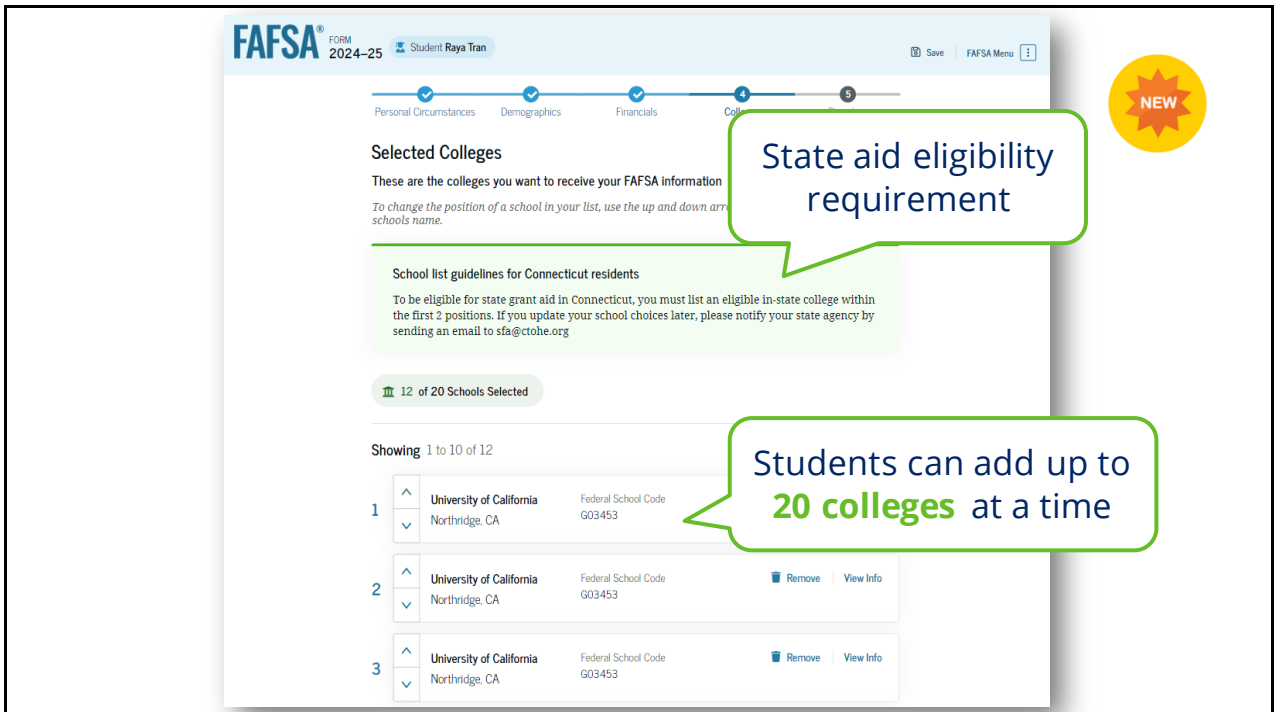
**More to come in
FAFSA Part Two**

College Selection



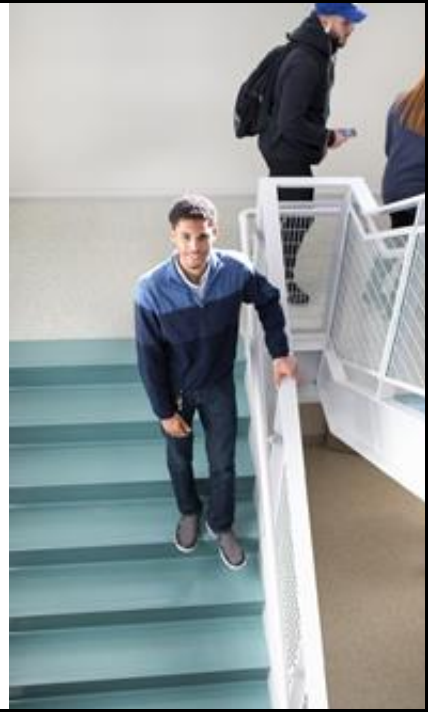


88



89

Signature & Next Steps



90



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

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

91

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, 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

Can't submit until all contributors have completed their part

92

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.

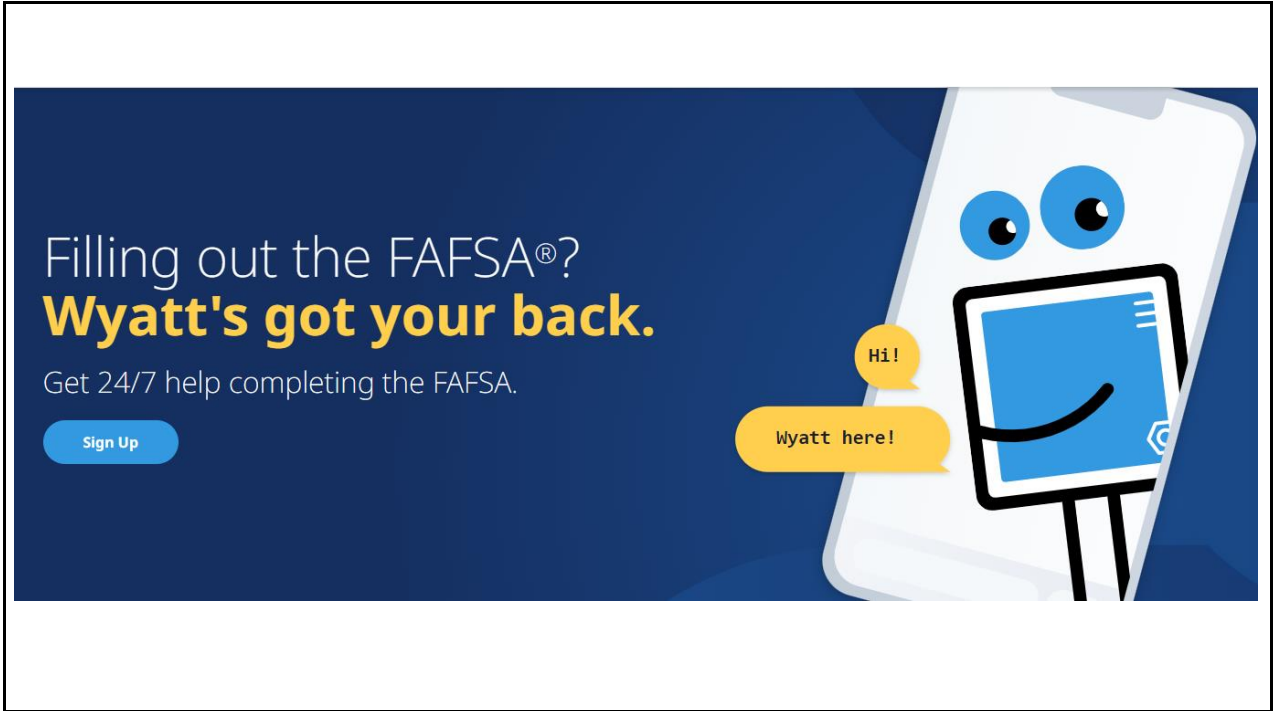
Parent Contributors	Date Request Sent	Status
Alcina Tran	07/13/2024	Invite Sent Edit
Travis Tran	07/13/2024	Invite Sent Edit

Can edit contributor information if needed

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:

93



Filling out the FAFSA®?
Wyatt's got your back.
Get 24/7 help completing the FAFSA.

[Sign Up](#)

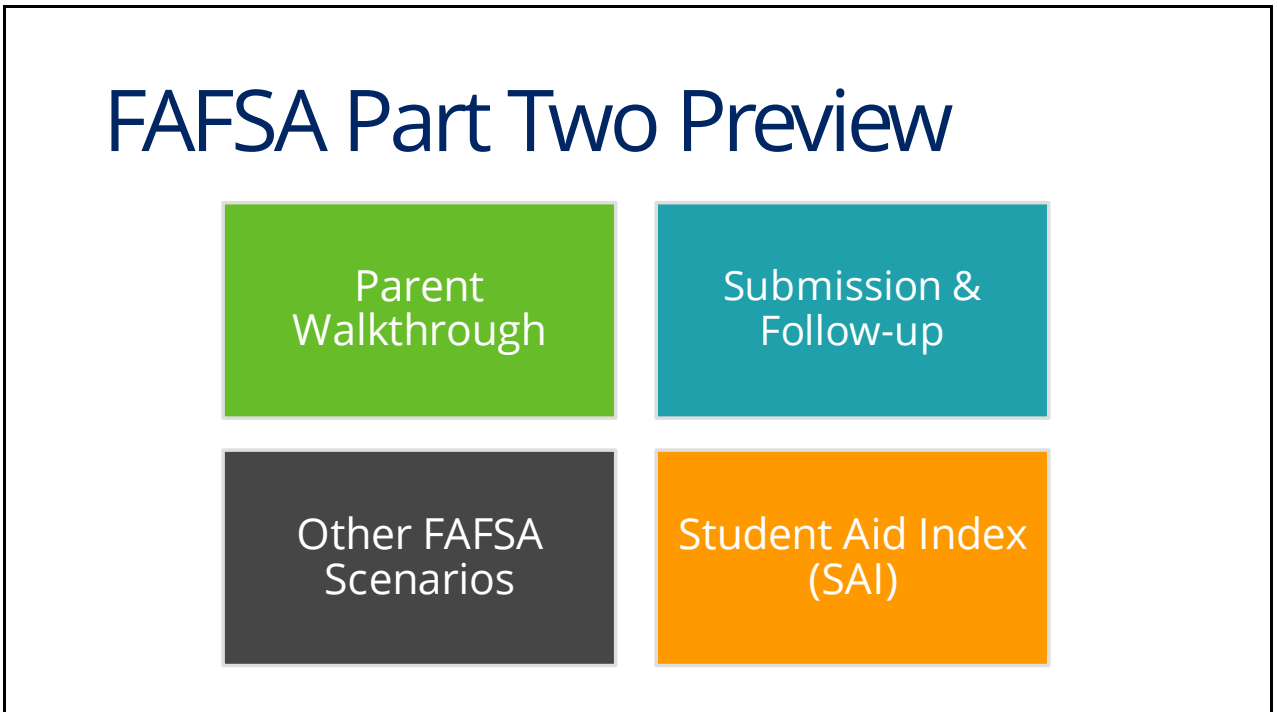
Hi!

Wyatt here!

The banner features a white robot character named Wyatt with large blue eyes and a blue screen for a mouth, holding a white tablet. The background is dark blue with white and yellow text and buttons.

94

FAFSA Part Two Preview

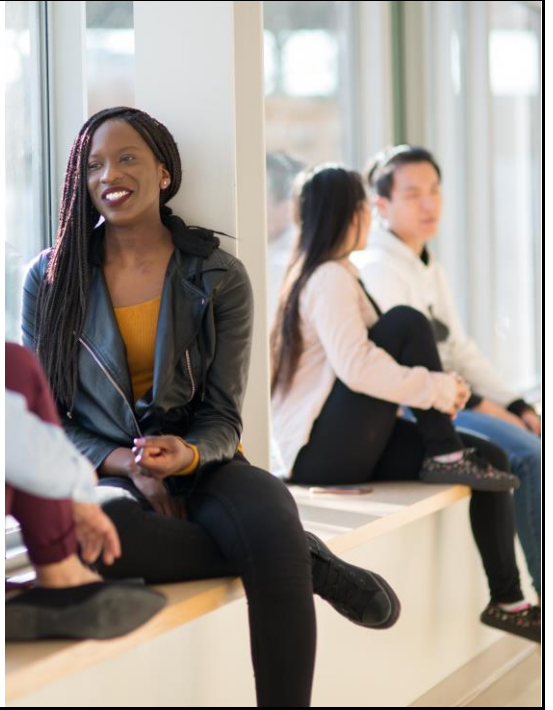


- Parent Walkthrough
- Submission & Follow-up
- Other FAFSA Scenarios
- Student Aid Index (SAI)

The slide contains four colored rectangular boxes arranged in a 2x2 grid. The top-left box is green and contains the text 'Parent Walkthrough'. The top-right box is teal and contains 'Submission & Follow-up'. The bottom-left box is dark grey and contains 'Other FAFSA Scenarios'. The bottom-right box is orange and contains 'Student Aid Index (SAI)'. The title 'FAFSA Part Two Preview' is centered at the top in a large blue font.

96

Post-Survey & Evaluation



97

Post-Survey



98



100



101

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