



## FINANCIAL AID GUIDE FOR CALIFORNIA FOSTER YOUTH

October 2017

# Visual Guide for Completing the FAFSA

This “Visual Guide” is intended to compliment Part 3 of the *Financial Aid Guide for California Foster Youth*, found within pages 6-10, with screen shots of the actual FAFSA application and detailed instructions.

October 2018

# Disclaimer

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- While we have made every effort to be accurate in this guide, financial aid programs change. Be sure to get current information.
- **This guide is intended for foster youth in California who qualify for “Independent Student Status” on the FAFSA (i.e. a student who was in foster care on or after their 13<sup>th</sup> birthday or in a court-ordered legal guardianship).** If you do not qualify for “Independent Student Status,” you will need to complete the Parental Demographics section and provide financial information about you and your parent(s). Information about this process is not included in this guide.
- **If you are an undocumented student,** remember to fill out the California Dream Act Application (CADAA) at [dream.csac.ca.gov](https://dream.csac.ca.gov) instead of the FAFSA. If you are a California undocumented student, you should apply even if you were a DACA recipient and granted a temporary Social Security Number. Most of the questions in the CADAA mirror the questions in the FAFSA; this guide can still be a helpful tool.

# How to Apply for Financial Aid?

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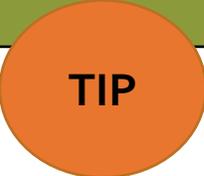
# Applying for Financial Aid?

## Where to Apply for Financial Aid? (FAFSA or CADAA)

| IF YOU ARE A U.S. CITIZEN, A PERMANENT RESIDENT OR OTHER ELIGIBLE NON-CITIZEN   | IF YOU ARE AN UNDOCUMENTED IMMIGRANT  |
|---|---|
| Complete the Free Application for Federal Student Aid (FAFSA)   | Complete the California Dream Act Application (CADAA)   |
| <b><a href="https://fafsa.ed.gov">fafsa.ed.gov</a></b>  | <b><a href="https://dream.csac.ca.gov">dream.csac.ca.gov</a></b>  |
| What is an eligible non-citizen?<br>Examples include a U.S. permanent resident who has a green card (Permanent Resident Card), a conditional permanent resident with a conditional Green Card, or a "refugee." You can find the complete list on the FAFSA. | California Dream Act Application (CADAA) allows undocumented and nonresident documented students who meet certain eligibility requirements to apply for state financial aid and allows qualified students to pay in-state resident fees (instead of higher out-of-state fees) at California's public colleges and universities. |

*Paper applications are also available for the FAFSA and CADAA by calling 1-800-433-3243 and 1-888-224-7268, respectively. Ask a counselor or other adult mentor for help completing the application. Most students say that they find the online application easier.*

# STEP 1: BEGIN A NEW FAFSA AT FAFSA.ED.GOV



TIP

Remember, this is a free application! Avoid websites that ask you to pay money for help in completing the FAFSA.

Returning User:  
Click "LOG IN"

New to the FAFSA Process:  
Click "START HERE"

The screenshot shows the FAFSA website interface. At the top, the browser address bar displays 'https://studentaid.ed.gov/sa/afsa'. Below the browser, there are navigation links for 'Login | Salesforce', 'California College Pat', 'Log In < John Burton', 'My meetings | GoToM', 'MailChimp Dashboar', 'Dashboard < AB 12 C', and 'FYSI Local Program C'. A language selector shows 'ENGLISH | ESPAÑOL'. The main header features the 'Federal Student Aid' logo, 'An OFFICE of the U.S. DEPARTMENT of EDUCATION', and 'PROUD SPONSOR of the AMERICAN MIND®'. A search bar contains 'Search FAFSA® Help'. A dark navigation bar includes 'Prepare for College', 'Types of Aid', 'Who Gets Aid', 'FAFSA®: Apply for Aid', and 'How to Repay Your Loans'. Below this, a breadcrumb trail reads 'Home » FAFSA®: Apply for Aid'. The main content area has a large heading 'FAFSA®: Apply for Aid' and a sub-heading 'Use the Free Application for Federal Student Aid (FAFSA®) form to apply for financial aid for college or grad school.' Two columns of text are present: 'NEW TO THE FAFSA® PROCESS?' with the text 'Completing the FAFSA form is free. Fill it out now.' and 'RETURNING USER?' with the text 'Correct info • Add a school View your Student Aid Report (SAR)'. At the bottom of these columns are two blue buttons: 'START HERE >' and 'LOG IN >'. Two yellow arrows originate from the text boxes on the left: one points to the 'LOG IN' button and the other points to the 'START HERE' button.

# STEP 1: BEGIN A NEW FAFSA AT FAFSA.ED.GOV

- The FAFSA must be completed every year.
- If you have done the FAFSA before, you can sign in as a returning user and then click on "LOG IN." This allows you to prefill the current year's FAFSA with some data from last year's FAFSA.

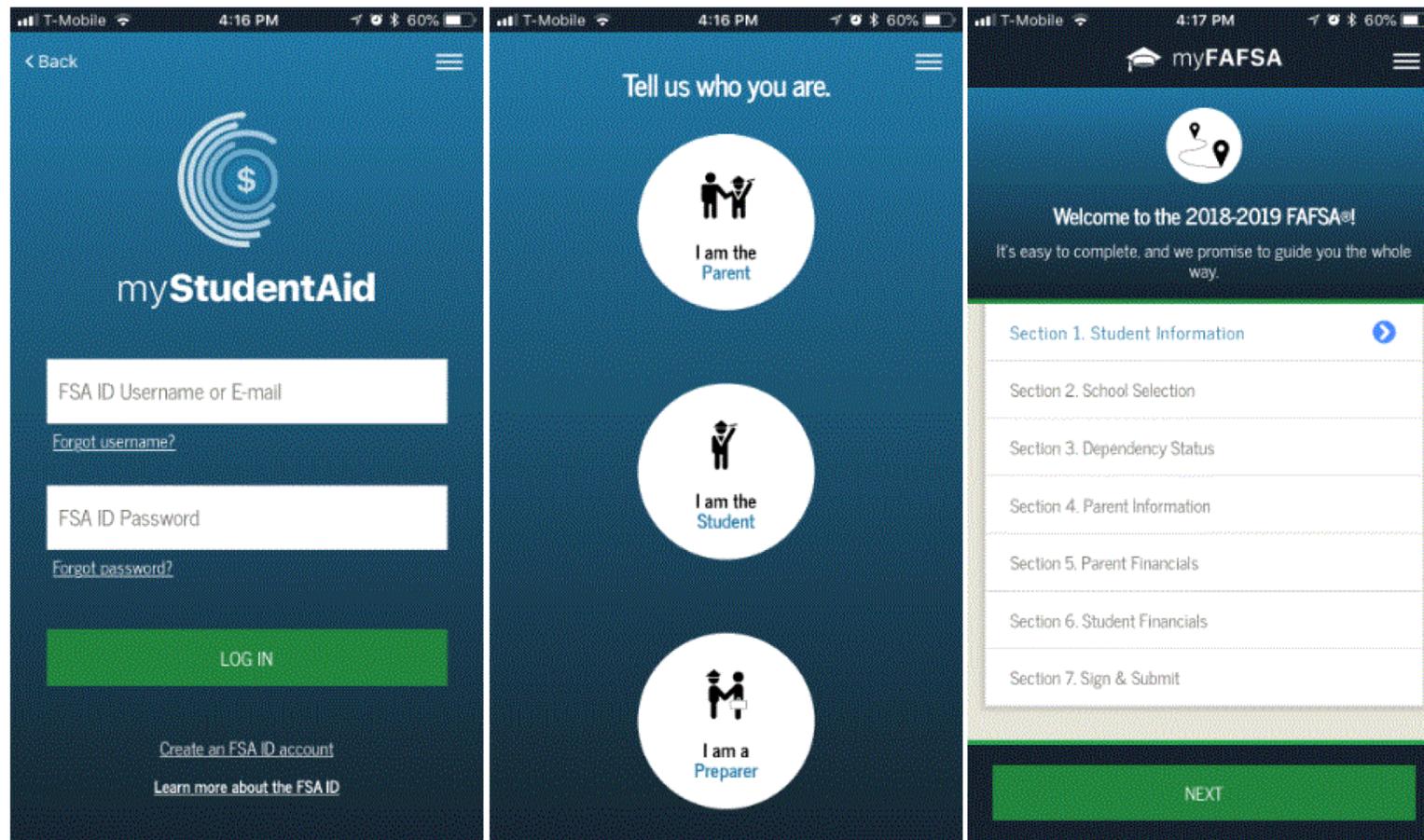
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# New FAFSA App on Smartphones



**myStudentAid** (4+)  
U.S. Department of Education  
Office of Federal Student Aid  
#200 in Finance  
★★★★☆ 3.9, 27 Ratings  
Free

FAFSA can now also be completed on a mobile phone through the myStudentAid app.



# Create an “FSA ID”

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*Federal Student Aid Identification (FSA ID)*

## STEP 2: CREATE AN "FSA ID" (FEDERAL STUDENT AID IDENTIFICATION)

When you start a new FAFSA, there are two log-in options.

→ Choose the option that says: **"I am the student"**

→ Then click the blue link that says **["Create one"](#)**

This takes you to the FSA ID website at **[fsaid.ed.gov](https://fsaid.ed.gov)**.

Your FSA ID will serve as your legal signature and you will need it to sign your FAFSA electronically before you submit the FAFSA.

The screenshot shows the 'Login' page for the FAFSA. At the top, there is a dark blue header with the word 'Login' in white. Below the header, the main content area is light gray. On the right side, there is a small box with the text: 'Form Approved OMB No. 1845-0001 App. Exp. 12/31/2020'. The main heading is 'Log in to the FAFSA'. Below this, there is a paragraph of text: 'Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the Save Key that the student made. [Help for parents.](#)' There are two radio button options: 'I am the student' (which is selected) and 'I am a parent, preparer, or student from a Freely Associated State'. An 'OR' button is between them. Below the options, there is a warning: 'Do not log in with the FSA ID if you are not the student.' and a link: 'Don't have an FSA ID? [Create one](#) or login using the [student's identifiers.](#)' There are two input fields: 'The student's FSA ID Username or Verified E-mail Address' and 'The student's FSA ID Password'. Each field has a question mark icon on the right. Below the first field is a link: '[Forgot Username](#)'. Below the second field is a link: '[Forgot Password](#)'. At the bottom right, there is a dark blue button with the text 'NEXT' and a right arrow. At the very bottom, there is a footer with the text: 'Site Last Updated: Sunday, September 30, 2018' and 'Download [Adobe Reader](#)'. In the center of the footer, it says: '©2010 fafsa.gov. All rights reserved.'

Annotations from the text on the left point to the 'I am the student' radio button and the 'Create one' link in the text below the options.

## STEP 2: CREATE AN "FSA ID" Continued

### You will be taken to a new page to create your FSA ID

→ Enter an email address that you check often so that you can get help if you get locked out or forget your username or password.

→ It is not recommended that you use a high school email address, since those often expire. Create or use an email address that you can use throughout college, such as Gmail, Yahoo or Outlook.

→ Create a Username and Password that can be easily remembered but should not be easy for someone else to figure out (Ex., do not use your name, date of birth, or the word "password").

Create an FSA ID Manage My FSA ID

Please enter your:

E-mail

Confirm E-mail

Username

Password

Confirm Password

✓ Numbers ✓ Uppercase Letters ✓ Lowercase Letters ✓ Special Characters ✓ 8-30 Characters

Show Text

CONTINUE >

# STEP 2: CREATE AN "FSA ID" (FEDERAL STUDENT AID IDENTIFICATION)

→ Enter your name and Social Security Number **exactly** as they appear on your Social Security Card.

\*\* If you don't know your Social Security Number, you can call your county's child welfare department or Independent Living Program (ILP) for assistance. You will need the physical card for employment, even for a work-study job.

\*\* If you don't have a social security number, apply for the CADAA at [dream.csac.ca.gov](http://dream.csac.ca.gov)



Enter your name and Social Security number exactly as they appear on your Social Security card.

First Name  ?

Middle Initial  ?

Last Name  ?

Date of Birth  ?

Social Security Number  -  -  ?

Show Text

CANCEL

◀ PREVIOUS

CONTINUE ▶

## STEP 2: CREATE AN "FSA ID" (FEDERAL STUDENT AID IDENTIFICATION)

→ Enter your mailing address, mobile phone number, and choose a preferred language.

→ Enter a mobile phone number so that you can get help if you get locked out or forget your username or password. Having a mobile phone number helps you unlock the FSA ID because the FAFSA processor can text unlock codes to this number. A regular (land line) phone number is less useful.

Mailing Address



City, State, Zip Code



Would you like to register your mobile phone number to reset your password and retrieve your username?

Yes, I would like to register my mobile phone for account recovery.



By selecting this option, you agree to receive text messages on your mobile phone and confirm you have reviewed and agree to the [terms](#). Message and data rates may apply.

No, I do not want to register my mobile phone for account recovery.

*Note:* You can register at any time by managing your FSA ID.

Mobile Phone



Confirm Mobile Phone



Alternate Phone



Language Preference

English

Español



CANCEL

CONTINUE ›

# STEP 2: CREATE AN "FSA ID" (FEDERAL STUDENT AID IDENTIFICATION)

→ Choose "Challenge Questions and Answers" that can easily be remembered in case you forget your FSA ID username or password.

→ Question 5 is optional.

→ Review that all the information is correct.

Please note that challenge questions and answers are not case sensitive.

Challenge Question 1

Answer 1

Show Text

Challenge Question 2

Answer 2

Show Text

Challenge Question 3

Answer 3

Show Text

Challenge Question 4

Answer 4

Show Text

Optional Question 5

Would you like to provide an 8-digit code to use to access your loan balances over the phone?

Yes  No

CANCEL

PREVIOUS

CONTINUE

# STEP 2: CREATE AN "FSA ID" (FEDERAL STUDENT AID IDENTIFICATION)

→ Click the box to certify that all the information you provided is correct, and that you accept the terms & conditions.

I declare under penalty of perjury under the laws of the United States of America that the information that I have provided to obtain an FSA ID is true and correct, and that I am the individual who I claim to be. I have not allowed this information to be provided by an employee or agent of a commercial entity, or other third party, for purposes of commercial advantage or private financial gain (regardless of whether that commercial entity or third party is providing a service to me). I understand that falsification of this statement may be punishable by a fine, by imprisonment of not more than five years, or both.

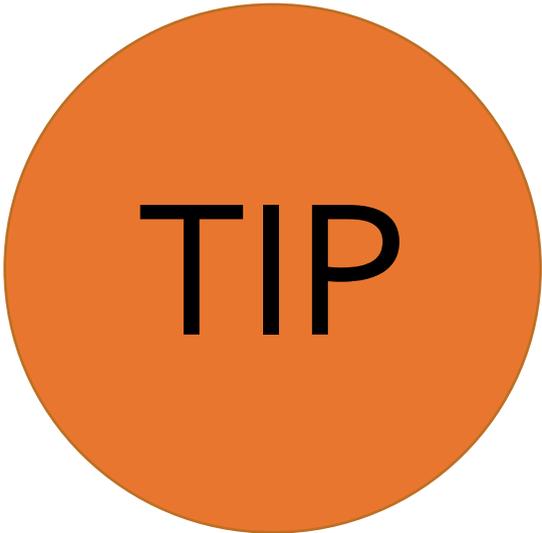
If you agree to these terms, select the "I certify that the above information is correct and accept the terms and conditions".

I certify that the above information is correct and accept the terms and conditions

CANCEL

PREVIOUS

CONTINUE



**TIP**

**Write down these items somewhere safe so you don't forget:**

- FSA ID Username
- FSA ID Password
- Email Address & Password
- FSA ID Challenge Questions & Answers

# You're Now Ready to Start Your Online FAFSA!

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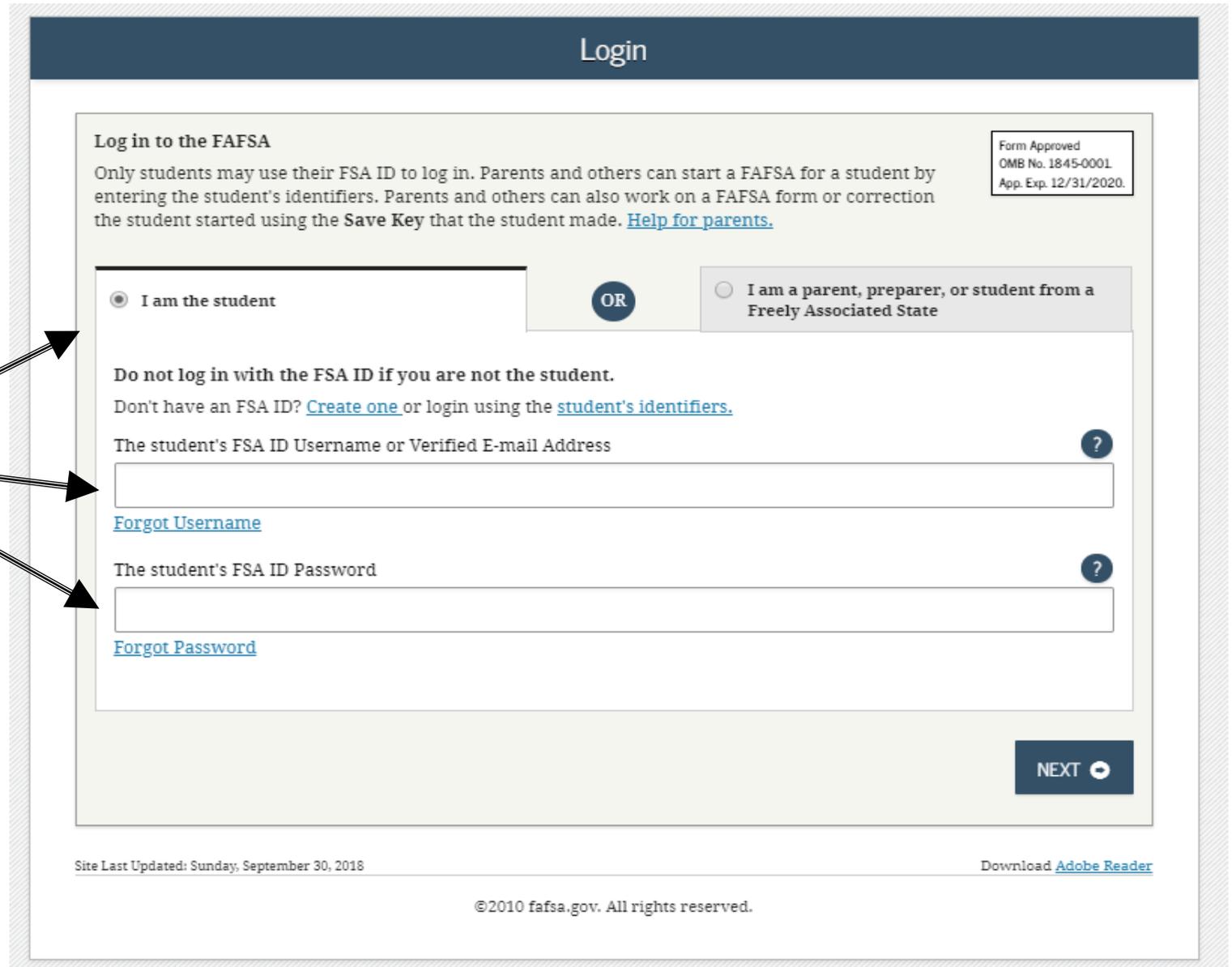
Login with your new FSA ID and begin the FAFSA

## STEP 3: COMPLETE THE FAFSA

→ Once your FSA ID is created, you can immediately log into the FAFSA at **fafsa.ed.gov** and start your application.

→ **Click "I am the student"**

→ Enter your FSA ID Username or Verified Email Address & FSA ID Password.



The screenshot shows the FAFSA login interface. At the top, there is a dark blue header with the word "Login" in white. Below the header, the page is titled "Log in to the FAFSA". A paragraph of text explains that only students can use their FSA ID to log in, while parents and others can start a FAFSA for a student by entering their identifiers. A link for "Help for parents" is provided. In the top right corner, there is a small box with the text "Form Approved OMB No. 1845-0001 App. Exp. 12/31/2020".

The main content area has two radio buttons: "I am the student" (which is selected) and "I am a parent, preparer, or student from a Freely Associated State". An "OR" button is positioned between them. Below the radio buttons, there is a warning: "Do not log in with the FSA ID if you are not the student." and a link to "Create one" for those without an FSA ID. There are two input fields: "The student's FSA ID Username or Verified E-mail Address" and "The student's FSA ID Password". Each field has a "Forgot" link below it. A "NEXT" button with a right arrow is located at the bottom right of the form area.

At the bottom of the page, there is a footer with the text "Site Last Updated: Sunday, September 30, 2018" and "Download Adobe Reader". The copyright notice "©2010 fafsa.gov. All rights reserved." is centered at the very bottom.

# STEP 3: COMPLETE THE FAFSA

First, read the Disclaimer and, if you agree, click "Accept"

**Disclaimer**

**Disclaimer**  
This is a U.S. Federal Government computer system intended to be solely accessed by individual users expressly authorized to access the system by the U.S. Department of Education. For security purposes and to ensure that the system remains available to all expressly authorized users, the U.S. Department of Education monitors the system to identify unauthorized users. Anyone using this system expressly consents to such monitoring. Except as expressly authorized by the U.S. Department of Education, unauthorized attempts to access, obtain, upload, modify, change, and/or delete information on this system are strictly prohibited and are subject to criminal prosecution under 18 U.S.C § 1030, and other applicable statutes, which may result in fines and imprisonment. For purposes of this system, unauthorized access includes, but is not limited to:

- Any access by an employee or agent of a commercial entity, or other third party, who is not the individual user, for purposes of commercial advantage or private financial gain (regardless of whether the commercial entity or third party is providing a service to an authorized user of the system); and
- Any access in furtherance of any criminal or tortious act in violation of the Constitution or laws of the United States or any State.

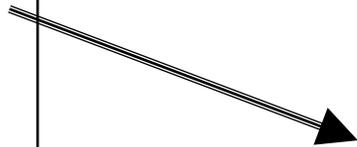
If system monitoring reveals information indicating possible criminal activity, such evidence may be provided to law enforcement personnel.

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# STEP 3: COMPLETE THE FAFSA

- Select the school year that you plan to attend college.
- Remember that the school year begins in the fall term. If you are applying for a summer session, that usually is part of the prior academic year.



Get Started

**STUDENT INFORMATION**

Welcome, John Lastname!

**Fill out your FAFSA form!**  
To receive federal student financial aid, you need to fill out a FAFSA every school year. Let's get started.

For which school year are you applying for financial aid?

If you are applying for a summer session, or just don't know which application to complete, check with the college you are planning to attend.  
[Which school year should I choose?](#)

START 2019-2020 FAFSA OR START 2018-2019 FAFSA

FSA ID Last Time, Date FSA ID Used: 02:47, 10/01/2018

**FSA ID Status:**  
[User Account Management](#)  
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.

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## STEP 3: COMPLETE THE FAFSA

- Follow the directions to create a “Save Key” in case you need to save your application and finish it later.
- You can return within 45 days to complete and submit the FAFSA.

### Start Student's 2019-2020 FAFSA

**STUDENT INFORMATION**

Form Approved  
OMB No. 1845-0001.  
App. Exp. 12/31/2020.

**Create a Save Key.**  
The Save Key is for temporary use for you or your parent to return and complete this specific FAFSA.

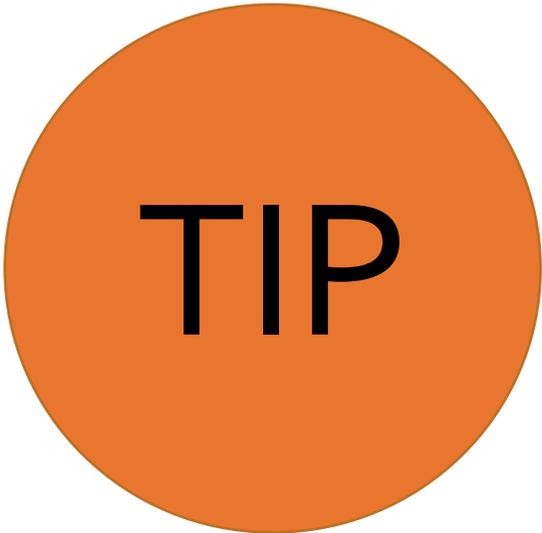
Create a Save Key ?

Re-enter Save Key ?

← MY FAFSA NEXT →

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# TIP

Make sure to write down your  
Save Key somewhere safe so you  
don't forget:

- ✓ FSA ID Username
- ✓ FSA ID Password
- ✓ Email Address & Password
- ✓ FSA ID Challenge Questions & Answers
- Save Key

# STEP 3: COMPLETE THE FAFSA

The Introduction Page includes general information about the FAFSA

→ Click "Next" at the bottom of each page to go to the next page

Introduction – 2019-2020 FAFSA

**STUDENT INFORMATION** [Expand All](#)

- > How can I get help completing my FAFSA?
- > How many steps does it take to complete?
- > How long will it take to complete?
- > Can I save my FAFSA if I can't finish it?
- > Documents needed to complete the FAFSA
- > Signing the FAFSA
- > *FAFSA on the Web Security and Privacy*

**NEXT** →

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## STEP 3: COMPLETE THE FAFSA

- Complete the seven sections listed as tabs at the top of the screen. The website will take you through each section.
- You can click "Save" at the top of the screen at any time to save your entries as you go along.
- Note that if you don't respond to all of the required questions, the system will alert you to complete the questions before you can move on to the next section.
- You can get more information about each question by clicking the  icon.

Exit Clear All Data View FAFSA Summary Save Help

### Personal Information for Student

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

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

Your last name   
Lastname

Your first name   
Abe

Your middle initial 

Your Social Security Number  
966-09-3014

Your date of birth   
11/02/2000 

# Student Demographics Section

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Part I: Student Demographics Information

Part II: Student Eligibility

# FAFSA SECTION 1: STUDENT DEMOGRAPHICS

## PART I: STUDENT DEMOGRAPHIC INFORMATION

- **Student Name:** Make sure that your name matches exactly as it appears on your Social Security Card. This is your legal name, not a nickname.
- **Social Security Number:** Make sure that your name and Social Security Number matches exactly as it appears on your Social Security Card.

Personal Information for Student

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

**STUDENT INFORMATION**

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

Your last name ?  
Lastname

Your first name ?  
John

Your middle initial ?

Your Social Security Number  
966-09-3020

Your date of birth ?  
04/19/2000

[← PREVIOUS](#) [NEXT →](#)

- **Permanent Mailing Address:** This should be the same address you use on official government documents such as tax returns and voter registration cards. This is an address where the student can receive postal mail, such as a P.O. Box. If you don't have a permanent mailing address, ask your college's financial aid administrator for help.
- **Email Address:** Double-check the email address to make sure there are no typos. The U.S. Department of Education and the colleges that you apply to will send FAFSA reminders, status updates and financial aid application results to this email address.

The screenshot shows the 'Student Address and E-mail' section of the FAFSA application. It features a navigation bar with tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Student Demographics' tab is active, and a sub-tab labeled 'STUDENT INFORMATION' is visible. The form contains several input fields, each with a question mark icon for help:

- Your permanent mailing address (include apt. number):** 1122 STRAIGHT STREET
- Your city (and country if not U.S.):** San Francisco
- Your state:** California (dropdown menu)
- Your ZIP code:** 94104
- Your e-mail address:** newuser@fafsademo.com
- Re-enter your e-mail address:** newuser@fafsademo.com

At the bottom right, there are two buttons: 'PREVIOUS' and 'NEXT'.

**State of Legal Residence:** If you select that you have lived in CA for at least 5 years, a textbox will appear on the screen saying that you are eligible for the California State student aid application (the Cal Grant).

A separate application is not required, but you need to make sure that your high school has submitted your verified GPA and that it has been matched to your FAFSA. Learn more in Part 4 “After the FAFSA” of the Financial Aid Guide for California Foster Youth.

If you answer no, you will need to provide the date that you became a legal resident of California.

The screenshot shows the 'Student Residency' section of the FAFSA application. At the top, there is a navigation bar with the following tabs: Student Demographics (active), School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. Below the navigation bar, there is a 'STUDENT INFORMATION' banner. A blue-bordered box contains an information icon and the text: 'You are eligible to transfer your FAFSA information into California's state student aid application. Use the **Start your state application** link on the FAFSA confirmation page to transfer your information. Note: This feature is only displayed once on the confirmation page after submitting your FAFSA.' Below this box, the question 'Have you lived in California for at least 5 years?' is displayed with radio buttons for 'Yes' (selected) and 'No'. A help icon is visible to the right of the question. At the bottom right, there are 'PREVIOUS' and 'NEXT' buttons. The footer of the page includes 'Site Last Updated: Sunday, September 30, 2018' and a link to 'Download Adobe Reader'.

# FAFSA SECTION 1: STUDENT DEMOGRAPHICS

## PART I: STUDENT DEMOGRAPHIC INFORMATION - continued

- **Telephone Number:** A telephone number is not required to complete the FAFSA. If you do provide a number, it should be one that a college financial aid office can call and reach you at.
- **Driver's License:** A driver's license is not required to complete the application, but can help prevent identity theft. The student's driving record and parking tickets do not affect eligibility for financial aid.

The screenshot shows the 'Student Phone and Driver's License' section of the FAFSA application. At the top, there is a dark blue header with the title 'Student Phone and Driver's License'. Below this is a navigation bar with several tabs: 'Student Demographics' (which is highlighted with a pencil icon), 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The main content area is titled 'STUDENT INFORMATION' and contains the following fields:

- 'Are you male or female?' with radio buttons for 'Male' and 'Female', and a question mark icon.
- 'Your telephone number' with a text input field containing '( ) \_\_\_-\_\_\_' and a question mark icon.
- 'Your driver's license number (if you have one)' with a text input field and a question mark icon.
- 'Your driver's license state' with a dropdown menu showing 'Select' and a question mark icon.

At the bottom right of the form, there are two buttons: 'PREVIOUS' with a left arrow and 'NEXT' with a right arrow.

- **Marital Status:** Your legal status is “single” if you are not married, even if you live with or have a boyfriend, girlfriend or significant other. Note that this question is only asking about your marital status.

The screenshot shows the 'Student Marital Status' section of the FAFSA application. At the top, a dark blue header reads 'Student Marital Status'. Below this is a navigation bar with tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Student Demographics' tab is active and highlighted with a pencil icon. A dark blue banner labeled 'STUDENT INFORMATION' is positioned above the question. The question asks, 'What is your marital status as of today?' and is followed by a dropdown menu currently showing 'Select'. To the right of the question is a help icon (a question mark in a circle). Below the dropdown are two buttons: 'PREVIOUS' with a left arrow and 'NEXT' with a right arrow. At the bottom of the page, there is a footer with the text 'Site Last Updated: Sunday, September 30, 2018' on the left and 'Download [Adobe Reader](#)' on the right. The copyright notice '©2010 fafsa.gov. All rights reserved.' is centered at the very bottom.

# FAFSA SECTION 1: STUDENT DEMOGRAPHICS

## PART I: STUDENT DEMOGRAPHIC INFORMATION - continued

- **Are you a U.S. citizen?** The three options are:
  - Yes, I am a U.S. citizen (or U.S. national)
  - No, but I am an eligible noncitizen  
If you select "No, but I am an eligible noncitizen," you will be asked to provide your Alien Registration Number.
  - No, I am not a citizen or eligible noncitizen

- **Selective Service:** Males are required to register with the Select Service System to complete their FAFSA. If you haven't registered yet, you will be able to use the FAFSA to automatically register you with Selective Service.
  - Federal law requires that most male U.S. citizens and male immigrants residing in the U.S. (permanent resident aliens), age 18-25, register with the Selective Service.
  - Transgender students must comply with the Selective Service registration requirement based on the student's sex at birth as listed on the student's birth certificate.

Student Eligibility

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

Are you a U.S. citizen? ?

Yes, I am a U.S. citizen (or U.S. national) ▾

**i** Most male citizens and male immigrants must register with the Selective Service System to receive federal student aid.

Are you registered with the Selective Service System? ?

Yes  No

Do you want us to register you with the Selective Service System? ?

Yes  No

PREVIOUS NEXT

**What will your college grade level be when you begin the 2019-2020 school year?**

→ If you took college courses while in high school, and were dually enrolled, you are still considered a first-time college student and can select the option: **"Never attended college/1<sup>st</sup> yr."**

**What degree or certificate will you be working on when you begin the school year?**

Select the option that best fits your *initial* educational goal.

→ It is important to NOT select "other/undecided" as it may limit the grants you can receive

→ If you are uncertain if you will attend a 2-year or 4-year college, select 4-year college

→ It is important to not select "2nd bachelor's degree" if you don't already have a bachelor's degree, as it may limit the grants you can receive

Student Education

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

What will your high school completion status be when you begin college in the 2019-2020 school year?

High school diploma

What will your college grade level be when you begin the 2019-2020 school year?

Never attended college/1st yr.

What degree or certificate will you be working on when you begin the 2019-2020 school year?

Select

Select

1st bachelor's degree

2nd bachelor's degree

Associate degree (occupational or technical program)

Associate degree (general education/transfer program)

Certificate/diploma (occupational/technical/education program of less than 2 yr.)

Certificate/diploma (occupational/technical/education program of at least 2 yr.)

Teaching credential program (nondegree program)

Graduate/professional degree

Other/undecided

# FAFSA SECTION 1: STUDENT DEMOGRAPHICS

## PART II: STUDENT ELIGIBILITY

- **Are you interested in being considered for work-study?** Federal Work-Study allows students with financial need to earn a portion of their financial aid award money through part-time employment on- or off-campus. You can decline it later if you change your mind. Answering "Yes" also will not guarantee that you will receive a Federal Work-Study job.
- **You will be asked: "Are you a foster youth or were you at any time in the foster care system?"**
  - Answering yes may give you access to more support to help you in college. Answer YES to this question, even if you were only in foster care for one day.
- **Foster youth can select "Other/unknown" for "Highest School Completed by Parent."**
  - Parent does not refer to a legal guardian or foster parent.
  - How you answer does not affect your eligibility for federal student aid.

The screenshot displays the 'Student and Parent Education Completion' form. The 'STUDENT INFORMATION' section is highlighted with a blue banner. It contains the following questions and options:

- Are you interested in being considered for work-study?  
 Yes  No  Don't know
- Are you a foster youth or were you at any time in the foster care system?  
 Yes  No
- Highest school completed by Parent 1  
Select
- Highest school completed by Parent 2  
Select

Navigation buttons for 'PREVIOUS' and 'NEXT' are visible at the bottom right of the form.

# FAFSA SECTION 1: STUDENT DEMOGRAPHICS

## PART II: STUDENT ELIGIBILITY

- If this is not your first year of college, you will be asked if you have ever received federal student aid.
- If yes, you will be asked if you have been convicted for the possession or sale of illegal drugs for an offense that occurred *while* receiving federal student aid (grants, work-study, and/or loans).
- If yes, you will be provided a worksheet to help you determine whether your conviction affects your eligibility for federal student aid.
- If your eligibility for federal student aid has been suspended due to a drug conviction, you can regain eligibility early by completing an *approved drug rehabilitation program* or by passing two unannounced drug tests administered by an approved drug rehabilitation program.

The screenshot shows the 'Student Eligibility Worksheet' interface. At the top, a dark blue header contains the title. Below it is a progress bar with seven steps: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Student Demographics' step is currently active. A dark blue banner labeled 'STUDENT INFORMATION' is positioned above the main form area. The form contains two questions, each with a help icon (a question mark in a circle) in the top right corner. The first question is 'Have you ever received federal student aid?' with radio buttons for 'Yes' (selected) and 'No'. Below this question is a dark blue header for an 'Eligibility Worksheet'. The second question is 'Have you been convicted for the possession or sale of illegal drugs for an offense that occurred while you were receiving federal student aid (grants, work-study, and/or loans)?' with radio buttons for 'Yes' and 'No'. At the bottom right of the form are two buttons: 'PREVIOUS' and 'NEXT'.

Student Eligibility Worksheet

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

Have you ever received federal student aid?  Yes  No

Eligibility Worksheet

Have you been convicted for the possession or sale of illegal drugs for an offense that occurred while you were receiving federal student aid (grants, work-study, and/or loans)?  Yes  No

PREVIOUS NEXT

# School Selection Section

---

Part I: School Selection

Part II: School Selection Summary

# FAFSA SECTION 2: SCHOOL SELECTION

## PART I: SEARCH FOR HIGH SCHOOL

- If you indicated that you are still in high school or have completed your high school diploma in the "Student Demographics" section, when you get to the "School Selection" section, you will see this screen asking you to provide the name, city and state of that high school.
- **Important: Use the search function to find your high school. This will help to ensure that your GPA is correctly matched when it is submitted by your high school.**
- You will not be prompted to answer this question if you indicated that you received a GED certificate or state- authorized high school equivalent certificate in the prior section.

The screenshot shows the "School Selection" section of the FAFSA application. At the top, there are tabs for "Student Demographics" (with a green checkmark), "School Selection" (with a pencil icon), "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". Below the tabs is a blue banner that says "STUDENT INFORMATION". A green box contains a success message: "Application was successfully saved." Below this is an information icon and text: "Because the FAFSA belongs to the student, 'you' and 'your' always (unless otherwise noted) refer to the student." Another information icon and text prompt: "Enter the name, city, and state of your high school, then click Search." Below this are three input fields: "What is the name of your high school?", "In what city is your high school located?", and "In what state is your high school located?" (with a dropdown menu). At the bottom right of the form are three buttons: "SEARCH" with a magnifying glass icon, "PREVIOUS" with a left arrow, and "NEXT" with a right arrow.

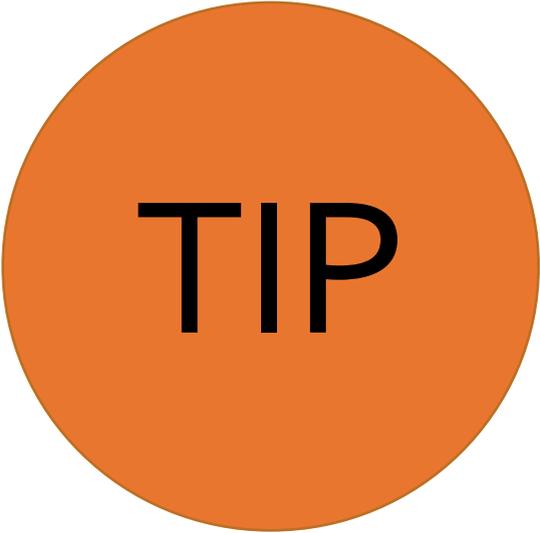
The screenshot shows the "School Selection" section of the FAFSA application. At the top, there are tabs for "Student Demographics" (with a pencil icon), "School Selection" (with a blue circle icon), "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". Below the tabs is a blue banner that says "STUDENT INFORMATION". A question is displayed: "What will your high school completion status be when you begin college in the 2019-2020 school year?" Below the question is a dropdown menu with the selected option: "GED certificate or state authorized high school equivalent certificate".

# FAFSA SECTION 2: SCHOOL SELECTION

## PART II: COLLEGE SELECTION

- Search for and select up to 10 colleges that you may want to attend. Information from the FAFSA will be sent to the schools you have selected.
- You can update or change school selections later if your plans change or you're just not sure yet.
- You must select at least one college to continue with the FAFSA. You do not need to have applied for admission yet to the colleges you list.

The screenshot shows the 'Search for Colleges' section of the FAFSA application. At the top, there is a progress bar with steps: Student Demographics (checked), School Selection (current step), Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. Below the progress bar is a 'STUDENT INFORMATION' banner. Three informational boxes provide guidance: 1) 'Maxine, based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.' 2) 'Here's where you'll search for the colleges to which you'd like to send your FAFSA information. You can add up to 10 colleges at a time to your FAFSA. If you're applying to more than 10 colleges, [follow these instructions](#). Make sure you add ALL colleges you're interested in, even if you haven't applied or been accepted yet.' 3) 'Complete the fields below to search for a college to add to your FAFSA.' Below these boxes are several form fields: 'Do you know the college's [Federal School Code](#)?' with radio buttons for 'Yes' and 'No' (selected); 'State' with a dropdown menu showing 'Select'; 'City (optional)'; and 'School Name (optional)'. At the bottom, there is a 'SEARCH TIPS' button, a 'PREVIOUS' button, and a 'SEARCH' button with a magnifying glass icon.



# TIP

## You can send your FAFSA to additional schools after your FAFSA has been processed.

After the FAFSA has been processed and you have received your Student Aid Report (SAR) or SAR Notification, you can submit the FAFSA to an additional 10 colleges, if necessary, by replacing the original set of 10 colleges with a new set of up to 10 colleges. Your original set of 10 colleges will still receive their copy of your FAFSA information. Repeat this process as many times as necessary, each time waiting until you receive the SAR or SAR Notification. You can do this by visiting [fafsa.ed.gov](https://fafsa.ed.gov) or by calling 1-800-4FED-AID (1-800-433-3243). You may need the DRN number from your SAR.

You can search by city or school name, if known.

You must list the state.

→ Click "Search" to populate search results.

The screenshot shows the 'Search for Colleges' section of the FAFSA application. At the top, there is a progress bar with tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'School Selection' tab is active, indicated by a pencil icon. Below the progress bar, a dark blue banner reads 'STUDENT INFORMATION'. The main content area contains three informational boxes with blue borders and 'i' icons. The first box states that the user may qualify for federal student aid. The second box explains that up to 10 colleges can be added and provides a link to instructions. The third box prompts the user to complete search fields. Below these boxes are four form fields: a radio button question about the Federal School Code (with 'No' selected), a dropdown menu for 'State', a text input for 'City (optional)', and another text input for 'School Name (optional)'. At the bottom, there is a 'SEARCH TIPS' button with an 'i' icon, a 'PREVIOUS' button with a left arrow, and a 'SEARCH' button with a magnifying glass icon.

Search for Colleges

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

John, based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.

Here's where you'll search for the colleges to which you'd like to send your FAFSA information. You can add up to 10 colleges at a time to your FAFSA. If you're applying to more than 10 colleges, [follow these instructions](#).

Make sure you add ALL colleges you're interested in, even if you haven't applied or been accepted yet.

Complete the fields below to search for a college to add to your FAFSA.

Do you know the college's [Federal School Code](#)?  Yes  No

State

City (optional)

School Name (optional)

SEARCH TIPS *i* PREVIOUS SEARCH *Q*

- Select up to 10 schools by clicking on the box on the left side of the college(s) you'd like to select.
- Be careful when selecting your colleges. Some college names are very similar and it's easy to get them confused.
- Costs vary by college type. State colleges and universities are generally the most affordable; private trade schools can be costly. Ask for help if needed to make selections.
- Be sure to list each UC or CSU campus to which you are applying for admission separately in this section.

College Search Results

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

**i** You can add up to 10 colleges to your FAFSA.

All of the information you include on your FAFSA, with the exception of the list of colleges, will be sent to each of the colleges you list. In addition, all of your FAFSA information, including the list of colleges, will be sent to your state grant agency.

**i** To select schools from the Search Results, click the checkbox to the left of each school you'd like to add to your FAFSA, then click **Next** or **Add More Schools** to continue.

Search Results: 1 to 12 of 12. You have **1 school** selected.

Sort By: Best Match

|                                     |  |
|-------------------------------------|--|
| <input type="checkbox"/>            | School Name: <a href="#">Los Angeles Music Academy</a><br>City: Pasadena State: CA Federal School Code: 038684 |
| <input type="checkbox"/>            | School Name: <a href="#">North-west College</a><br>City: Pasadena State: CA Federal School Code: 025916        |
| <input type="checkbox"/>            | School Name: <a href="#">Pacific Oaks College</a><br>City: Pasadena State: CA Federal School Code: 001255      |
| <input checked="" type="checkbox"/> | School Name: <a href="#">Pasadena City College</a><br>City: Pasadena State: CA Federal School Code: 001261     |

VIEW COLLEGE INFO ADD MORE SCHOOLS NEXT

- This page asks you to indicate your housing plans for each campus. Most four-year universities or colleges offer on-campus housing, but only a few community colleges in California offer on-campus housing.
- **Do NOT** select "With Parent" as your housing plan if you plan to live with a foster parent, relative caregiver or legal guardian. Instead, select "Off-Campus." This is crucial for getting all the money that is available to you to pay for your living expenses.
- Note that the order in which you list the colleges does not make a difference in California.

Selected Colleges and Housing Plans

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

**STUDENT INFORMATION**

You may change the positioning of any school in this list. To do so, click the icon to the left of the school name and then use the buttons displayed to change the position of the selected school. The **UP** and **DOWN** buttons will move the school one position up, or one position down. The **REMOVE** button will delete the school from your list.

For federal student aid purposes, it does not matter in what order you list your selected schools. However, the order in which you list schools may affect your eligibility for state aid. Find more information on your state's preferences for listing schools [here](#).

For each school listed, select the appropriate housing plan from the dropdown list.

|                      |                       |
|----------------------|-----------------------|
| School Name:         | Pasadena City College |
| Federal School Code: | 001261                |
| Housing Plans        | On Campus             |

|                      |                      |
|----------------------|----------------------|
| School Name:         | Santa Monica College |
| Federal School Code: | 001286               |
| Housing Plans        | Off Campus           |

REMOVE UP DOWN

|                      |                                |
|----------------------|--------------------------------|
| School Name:         | San Francisco State University |
| Federal School Code: | 001154                         |
| Housing Plans        | With Parent                    |

VIEW COLLEGE INFO

ADD MORE SCHOOLS PREVIOUS NEXT

# Dependency Status Section

---

Dependency Determination

# FAFSA SECTION 3: DEPENDENCY STATUS

## Dependency Determination

If you can answer "Yes" to any of the questions in this section, you are considered an "Independent Student" for the purposes of the FAFSA.

**"Independent Student Status"** means that you do not have to provide any information, including income information, about biological, adoptive or foster parents (including relative or non-relative caregivers) or legal guardians in the Parent Demographics section.

The screenshot shows the FAFSA application progress bar with the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (active), Parent Demographics, Financial Information, Sign & Submit, and Confirmation. A blue banner labeled "STUDENT INFORMATION" is visible. Below it, a green box contains the message "Application was successfully saved." A blue box contains an information icon and the text: "Because the FAFSA belongs to the student, 'you' and 'your' always (unless otherwise noted) refer to the student." Three questions are listed, each with a help icon (question mark) to its right:

- Were you born before January 1, 1996?  
 Yes  No
- As of today, are you married?  
 Yes  No
- At the beginning of the 2019-2020 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?  
 Yes  No

At the bottom right, there are two buttons: "PREVIOUS" and "NEXT".

## Dependency Determination

If the student answered "no" to the first three dependency questions, these two questions appear on the next screen.

Answering yes to either question will also give the student "independent student" status.

Does Student Have Dependents?

Student Demographics School Selection **Dependency Status** Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

Do you now have or will you have children who will receive more than half of their support from you between July 1, 2019 and June 30, 2020? ?

Yes  No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2020? ?

Yes  No

[PREVIOUS](#) [NEXT](#)

# FAFSA SECTION 3: DEPENDENCY STATUS - continued

Current or former foster youth may qualify for “Independent Student Status” on the FAFSA if they can answer “Yes” to any part of either of these two questions:

“At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?”

**OR**

“Does someone other than your parents or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?”

Student Additional Dependency Questions

Student Demographics School Selection **Dependency Status** Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

Answer the following questions to determine if you are required to provide information about your parents on your FAFSA. Check all that apply or check **None of the above**.

- Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
- Are you a veteran of the U.S. Armed Forces?
- At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?
- As determined by a court in your state of legal residence, are you or were you an emancipated minor?
- Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?
- None of the above

PREVIOUS NEXT

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# FAFSA SECTION 3: DEPENDENCY STATUS - continued

## NOT SURE IF YOU QUALIFY?

- Neither legal guardians nor foster parents are considered parents when completing the FAFSA. If you are in legal guardianship, you can qualify for “Independent Status” on the FAFSA.
- Even if you were in foster care, or were a dependent or ward of the court, for just one day after you turned 13, you qualify.
- If you were a dependent or ward of the court, but remained in the legal custody of your parents, you are not considered a ward of the court for the purposes of the FAFSA and therefore do not qualify for “Independent Status” as a foster youth.

**TIP** If you exited foster care before the age of 13, you will most likely need to provide information about your parents’ income. You can request an exemption, however, for unusual circumstances. Consult with the financial aid office at your college for more information.

- Dependent or Ward of the Court? The term “ward” is used to mean “dependent” of the court. You are a ward of the court (regardless of whether this status is determined by the county or state) if the court has assumed custody of you, even for just one day. Court-ordered documents exist that designate you as a ward of the court.

## HOW TO PROVIDE VERIFICATION OF YOUR FOSTER YOUTH STATUS

- Your college may require documentation to verify your “Independent Student Status.” You will not receive your financial aid unless you provide any requested verification forms to your college.
  - **Current foster youth:** Contact your county social worker or Independent Living Program (ILP) Coordinator for your Court Dependency Letter.
  - **Former foster youth:** Contact your county child welfare agency, local ILP program or the State Foster Care Ombudsman’s Office: 877-846-1602.

**SAVE A COPY FOR YOURSELF!  
YOU MIGHT NEED IT AGAIN.**

# FAFSA SECTION 3: DEPENDENCY STATUS - continued

**Household Size:** The numbers for you, and if you indicated previously that you are married, your spouse, will automatically populate on this screen.

If you indicated in the dependency section that you have children, you must enter the number of children.

Your siblings, other relatives, family of origin, foster family, people living in your group home or others who live with you are not included in household size.

**Number in College:** Enter "1" for number in college unless you have a spouse who will also be attending college at least half-time.

The screenshot shows the 'Student Household Info' section of the FAFSA application, specifically the 'Dependency Status' step. The progress bar at the top indicates that 'Student Demographics' and 'School Selection' are completed, while 'Dependency Status' is the current step. Below the progress bar, the 'Household Size' section contains the following fields:

- 'You': 1
- 'Your spouse, based on your marital status': 0
- 'Your children (even if they do not live with you), if you will provide more than half of their support from July 1, 2019 through June 30, 2020': 1
- 'Your number of family members in 2019-2020 (household size)': 2

Below the 'Household Size' section is the 'Number in College' section, which contains the following field:

- 'How many people in your household (as reported above) will be in college in 2019-2020?': 1

At the bottom right of the form, there are two buttons: 'PREVIOUS' and 'NEXT'.

Even if you are determined to be an Independent Student, you will be asked if you want to answer questions about your parents.

**You can answer “No” to skip these questions. Answering “No” will not prevent you from getting financial aid.**

Independent Student

Student Demographics School Selection **Dependency Status** Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

You are considered an **“independent”** student. This means you are not required to answer questions about your parents. However, you may want to answer questions about your parents if:

- you are a law school or health profession student (such as a medical or nursing student), or
- your school requires parental information from all students.

Do you want to answer questions about your parents?

Yes  No

PREVIOUS NEXT

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# Parent Demographics Section

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# FAFSA SECTION 4: PARENT DEMOGRAPHICS

If you were determined to be **“Independent”** in the previous Dependency Determination section, you will **not** be required to complete this section. You will automatically proceed to the next section and only need to provide financial information for yourself.

Parent Marital Status

Student Demographics ✓ School Selection ✓ Dependency Status ✓ **Parent Demographics** Financial Information Sign & Submit Confirmation

**PARENT INFORMATION**

✓ Application was successfully saved.

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

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

Select

← PREVIOUS NEXT →

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# Financial Information Section

These instructions are for students with "Independent Status."  
Dependent students will need to also provide parent information.

---

Option a). If you select "*Already Completed*" IRS Income Tax Return

Option b). If you select "*Not Going to File*" IRS Income Tax Return

Option c). If you select "*Will File*" IRS Income Tax Return

# FAFSA SECTION 5: FINANCIAL INFORMATION

Pay careful attention to which year's income, tax and asset information you have to report in this section. FAFSA uses income and tax information from what they call the "prior-prior" year. Asset information is based on the date the FAFSA is filed.

You will be asked if you completed your IRS income tax return for the appropriate year. You must select one of three options:

- Already completed
- Will file
- Not going to file

Student Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

STUDENT INFORMATION

Application was successfully saved.

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

For 2017, have you completed your IRS income tax return or another tax return?

Select

Select

Already completed

Will file

Not going to file

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Option a).

If you select *“Already Completed”*

**IRS Income Tax Return**

---

If you filed taxes for the requested year, select this option.

# FAFSA SECTION 5: FINANCIAL INFORMATION

## If you select "Already Completed":

Select "Link to IRS" to transfer your federal income tax return information directly into the FAFSA from the IRS using their "Data Retrieval Tool" (DRT).

- To protect security of tax information, you will not be able to see the actual information that is being transmitted.
- If you have difficulty with the DRT or it's not working, you can manually enter the information from your federal income tax return.
- If you don't have a copy of your tax return, you can download a free transcript at [irs.gov/transcript](https://www.irs.gov/transcript) or request a federal income tax return transcript by filing IRS Form 4506-T, which can be found at [www.irs.gov/pub/irs-pdf/f4506t.pdf](https://www.irs.gov/pub/irs-pdf/f4506t.pdf). If you see a reference to a \$50 fee, it means you have the wrong form (IRS Form 4506 instead of IRS Form 4506-T).

Student Tax Filing Status

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

Application was successfully saved.

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

For 2017, have you completed your IRS income tax return or another tax return?

Already completed

For 2017, what is your tax filing status according to your tax return?

Single

Did you file a Puerto Rican or foreign tax return for 2017?

Yes  No

IRS Data Retrieval Tool

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS Data Retrieval Tool (IRS DRT)!

LINK TO IRS

PREVIOUS NEXT

# FAFSA SECTION 5: FINANCIAL INFORMATION

- “Leaving *FAFSA on the Web*” will display when going to the IRS Web site.
- It will inform you that your IRS tax information will not display, for your protection.
- Click “PROCEED TO IRS SITE” or “SKIP IRS TRANSFER” if you would like to enter the information manually (not recommended).

The screenshot shows the 'Student Leaving FAFSA' page. At the top, a dark blue header contains the title 'Student Leaving FAFSA'. Below the header is a progress bar with seven steps: 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The first three steps have green checkmarks, while 'Financial Information' has a blue pencil icon. A blue banner labeled 'STUDENT INFORMATION' is positioned above the main content area. The main content area features a blue circular icon with a white door and a yellow arrow pointing right. To the right of the icon, the text reads: 'Leaving *FAFSA on the Web*. You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site. Your FAFSA information will be saved. Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA. For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.' At the bottom right, there are two buttons: 'SKIP IRS DRT' with a document icon and 'PROCEED TO IRS SITE' with a right-pointing arrow icon. A black arrow from the text in the left sidebar points to the 'PROCEED TO IRS SITE' button. At the bottom left, it says 'Site Last Updated: Sunday, September 30, 2018'. At the bottom right, it says 'Download [Adobe Reader](#)'.

# FAFSA SECTION 5: FINANCIAL INFORMATION

Next, you will be taken to the IRS Data Retrieval Tool Site.

- A warning text appears as the IRS Data Retrieval Tool site is displayed.
- Click "Ok"

The screenshot shows the IRS.gov website interface. At the top, the IRS logo and ".gov" domain are visible, along with a "Español" link. The main heading is "Get My Federal Income Tax Information". Below this, there is a link to the "Privacy Notice" and a prompt to "Enter the following information from your 2017 Federal Income Tax Return." A "Required fields" indicator is present. The form contains several input fields: "First Name \*" with the value "GDIT", "Last Name \*" with "DATA", "Social Security Number \*" with "\*\*\* - \*\* - 2630", and "Date of Birth \*" with "01 / 01 / 1999". Below these are fields for "Filing Status", "Address", "Street", "P.O.", "Apt.", "Country", "City", "State", and "ZIP". A "Return" button is at the bottom left, and a "Submit" button is at the bottom right. A "Message from webpage" dialog box is overlaid in the center, featuring a yellow warning triangle icon and the text: "THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY! Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431)." An "OK" button is located at the bottom right of the dialog box. An arrow from the text box on the left points to the dialog box.

## 2019-20 IRS Data Retrieval Tool, page 1:

The fields at the top are pre-filled based on FAFSA responses. The Social Security Number cannot be updated.

Provide the address that matches your **Federal Income Tax Return** for the requested year.



### Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2017 Federal Income Tax Return.



Required fields \*

|   |  |
|---|--|
| First Name *  | GDIT   |
| Last Name *   | DATA   |
| Social Security Number *                                  | *** - ** - 2630                                |
| Date of Birth *   | 01 / 01 / 1999                                 |
| Filing Status *   | Single <input type="button" value="v"/>        |
| Address · Must match your 2017 Federal Income Tax Return. |  |
| Street Address *  | <input type="text"/>                           |
| P.O. Box (Required if entered on your tax return)         | <input type="text"/>                           |
| Apt. Number (Required if entered on your tax return)      | <input type="text"/>                           |
| Country *   | United States <input type="button" value="v"/> |
| City, Town or Post Office *                               | <input type="text"/>                           |
| State/U.S. Territory *                                    | Select One <input type="button" value="v"/>    |
| ZIP Code *  | <input type="text"/>                           |

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

[Return to FAFSA](#)

[Submit](#)

### Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2017 Federal Income Tax Return.



Required fields \*

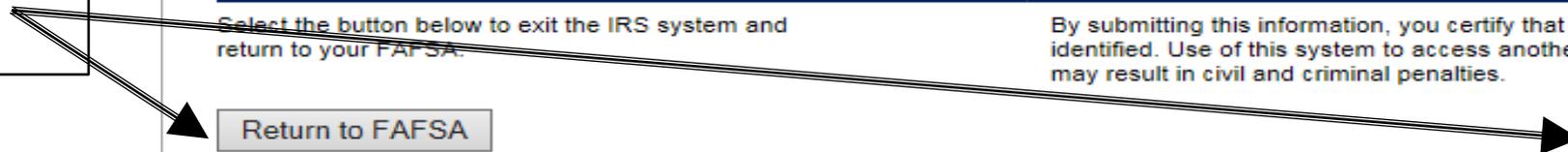
|   |  |
|---|--|
| First Name *  | GDIT   |
| Last Name *   | DATA   |
| Social Security Number *                                  | *** - ** - 2630                                |
| Date of Birth *   | 01 / 01 / 1999                                 |
| Filing Status *   | Single <input type="button" value="v"/>        |
| Address · Must match your 2017 Federal Income Tax Return. |  |
| Street Address *  | 4050 Alpha Rd Test                             |
| P.O. Box (Required if entered on your tax return)         |  |
| Apt. Number (Required if entered on your tax return)      |  |
| Country *   | United States <input type="button" value="v"/> |
| City, Town or Post Office *                               | Farmers Branch                                 |
| State/U.S. Territory *                                    | Texas (TX) <input type="button" value="v"/>    |
| ZIP Code *  | 75244  |

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

2019-20 IRS Data Retrieval Tool, page 1, continued:

- Click "Submit" to retrieve IRS data, or "Return to FAFSA" to discontinue use of the IRS DRT and return to your FAFSA.



## 2019-20 IRS Data Retrieval Tool, page 2:

- Check the "Transfer My Tax Information..." box and click "Transfer Now" to carry this data back into your FAFSA
- OR
- Check the "Do Not Transfer..." box and click "Do Not Transfer" to discontinue use of the IRS DRT

You are again notified on this page that the information will not display on the IRS page or on the fafsa.ed.gov site.



### 2017 Federal Income Tax Information

#### Gdit Data

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

|                        |                         |                                    |
|------------------------|-------------------------|------------------------------------|
| Tax Year               | Type of Return Filed    | Untaxed Pensions                   |
| Name(s)                | Adjusted Gross Income   | Untaxed IRA Distributions          |
| Social Security Number | Income Earned from Work | Tax exempt Interest Income         |
| Filing Status          | Income Tax              | IRA Deductions and Payments        |
| IRS Exemptions         | Education Credits       | Status of Amended Returns Received |

Refer to your tax records if you have a question about the values you reported.

Print this page for your records before choosing an option below.

#### Transfer My Tax Information into the FAFSA

- The tax information provided to FOTW will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

[Transfer Now](#)

#### Do Not Transfer My Tax Information and Return to the FAFSA

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

[Do Not Transfer](#)

# FAFSA SECTION 5: FINANCIAL INFORMATION

2019-20 "Student Financial Information" page.

An alert message will indicate that the IRS Data was successfully transferred and will be identified as "Transferred from the IRS".

This data cannot be changed or viewed.

## Student IRS Info

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics ✓ Financial Information  Sign & Submit Confirmation

 **You have successfully transferred 2017 IRS tax information.**

 Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS." For your protection, IRS tax return information is not displayed on the FAFSA.

What type of income tax return did you file for 2017?  
**Transferred from the IRS** 

What was your adjusted gross income for 2017?  
**Transferred from the IRS** 

 PREVIOUS  NEXT 

# FAFSA SECTION 5: FINANCIAL INFORMATION

## 2019-20 "Student Financial Information".

If the student clicked on "No Thanks" for using the IRS Data Retrieval Tool, then they will be asked questions about income and tax information from their federal income tax return

**Note: Whenever possible, students should use the Data Retrieval Tool.**

### Student Eligible for IRS DRT

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

**Applying is faster and easier with the IRS DRT!**

Based on your responses, we recommend that you transfer your information from the IRS into this FAFSA. The [IRS Data Retrieval Tool](#) allows users to link to the IRS Web site and securely transfer original IRS tax return information into their FAFSA.

**For your protection, your tax return information will not display on the IRS Web site or on the FAFSA.**

If you use the IRS DRT, you may not have to provide additional IRS documentation later to qualify for federal student aid.

[LINK TO IRS](#) ↔

[No Thanks](#)

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# FAFSA SECTION 5: FINANCIAL INFORMATION

## 2019-20 “Student Financial Information”

The student will be asked to provide information from their tax return, including the type of tax return filed, the adjusted gross income, and how much was earned from working.

**Tip:** The FAFSA tells you on what line of your tax return you can find the requested information.

The screenshot shows the 'Student IRS Info' section of the FAFSA application. The progress bar at the top indicates that 'Student Demographics', 'School Selection', and 'Dependency Status' are completed (marked with green checkmarks), while 'Financial Information' is the current step (marked with a pencil icon). Below the progress bar, the 'STUDENT INFORMATION' section asks: 'What income tax return did you file for 2017?'. A dropdown menu shows 'IRS 1040'. Below that, it asks: 'What was your adjusted gross income for 2017? This amount is found on IRS Form 1040-line 37.'. A text input field shows '\$ 10,000 .00'. To the right of the input field is an 'INCOME ESTIMATOR' button. At the bottom right, there are 'PREVIOUS' and 'NEXT' navigation buttons.

The screenshot shows the 'Student Income from Work' section of the FAFSA application. The progress bar at the top is identical to the previous screenshot, with 'Student Demographics', 'School Selection', and 'Dependency Status' completed, and 'Financial Information' as the current step. Below the progress bar, the 'STUDENT INFORMATION' section asks: 'How much did you earn from working (wages, salaries, tips, etc.) in 2017? This amount is the total of IRS Form 1040-lines 7+12+18 and Box 14 [Code A] of IRS Schedule K-1 (Form 1065)'. A text input field shows '\$ 10,000 .00'. At the bottom right, there are 'PREVIOUS' and 'NEXT' navigation buttons. An arrow from the tip box in the left margin points to the question text in this screenshot.

# FAFSA SECTION 5: FINANCIAL INFORMATION

If you indicated that you filed an IRS form 1040 and your income was below a certain threshold, you will be asked if you are a dislocated worker. If you are unsure if you are a dislocated worker, click the Help icon for a full definition.

If you answer Yes, the financial aid administrator at your college may require proof that you or your spouse is a dislocated worker.

You may then be asked if you received any federal benefits in 2017 or 2018. These federal benefits often have different names locally:

| Federal Benefit Name                             | California Benefit Name        |
|--|--------------------------------|
| Medicaid   | Medi-Cal                       |
| Supplemental Nutrition Assistance Program (SNAP) | Cal Fresh (i.e. "food stamps") |
| Temporary Assistance for Needy Families (TANF)   | CalWorks                       |

Student Simplified Path Determination

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

**STUDENT INFORMATION**

As of today, are you a [dislocated worker](#)? ?

Yes  No  Don't know

**In 2017 or 2018, did you or anyone in your household receive benefits from any of the federal benefits programs listed below?** ?

Check all that apply or check **None of the above**. If, at the time you are completing the FAFSA, you or anyone in your household did NOT receive any of these benefits during 2017 or 2018, but do receive any of them on or before December 31, 2018, you must return to the FAFSA and update your response.

Answering these questions will not reduce eligibility for student aid or these programs.

- Medicaid
- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program ([SNAP](#))
- Free or Reduced Price School Lunch
- Temporary Assistance for Needy Families ([TANF](#))
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of the above

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# FAFSA SECTION 5: FINANCIAL INFORMATION

## Additional IRS info

The student will then need to provide the amount of their income tax and number of exemptions.

Remember that the instructions tell you what line to find this information on from your tax return.

### Student Additional IRS Info

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

Enter the **amount of your income tax for 2017**. This amount is found on IRS Form 1040A-lines (28 minus line 36) or 1040EZ-line 10. ?

\$  .00

Enter your exemptions for 2017. This amount is found on IRS Form 1040A-line 6d or 1040EZ-line 5 worksheet. ?

PREVIOUS NEXT

# FAFSA SECTION 5: FINANCIAL INFORMATION

## Questions for Tax Filers Only

Based on the answers to the previous questions, you may be asked if you would like to skip the remaining questions about your income and assets. There is no penalty for choosing yes and skipping the remaining questions.

Otherwise, the student will be asked about various other forms of income.

Student Questions for Tax Filers Only

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Financial Information ✎ Sign & Submit L Confirmation

**STUDENT INFORMATION**

**Did you have any of the following items in 2017? Enter amounts for all that apply.**

|  |   |
|--|---|
| Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q   | ? |
| \$ <input type="text" value="0"/> .00  |   |
| Student college grant and scholarship aid reported to the IRS in your income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships | ? |
| \$ <input type="text" value="0"/> .00  |   |
| Education credits ( <i>American Opportunity Tax Credit</i> or <i>Lifetime Learning Tax Credit</i> ) from IRS Form 1040A-line 33  | ? |
| \$ <input type="text" value="0"/> .00  |   |
| IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040A-line 17   | ? |
| \$ <input type="text" value="0"/> .00  |   |
| Tax exempt interest income from IRS Form 1040A-line 8b   | ? |
| \$ <input type="text" value="0"/> .00  |   |
| Untaxed portions of IRA distributions from IRS Form 1040A-lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here   | ? |
| \$ <input type="text" value="0"/> .00  |   |
| Untaxed portions of pensions from IRS Form 1040A-lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here  | ? |
| \$ <input type="text" value="0"/> .00  |   |

# FAFSA SECTION 5: FINANCIAL INFORMATION

## Additional Financial Info.

If you received federal work-study, you must enter the information twice in the FAFSA so that it is subtracted when determining your total income. First, include the amount in the total provided when asked "How much did you earn from working?"

Also provide the amount in Additional Financial Info Section that says, "Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships"

Student Additional Financial Info

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

Did you have any of the following items in 2017? Enter amounts for all that apply.

Child support you paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household ?

\$ 0 .00

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

\$ 0 .00

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

\$ 0 .00

CHECK FOR ERRORS PREVIOUS NEXT

## Untaxed Income

You DO NOT have to report the following information as income earned from working, or in the “Additional Financial Information” or “Untaxed Income” section:

- Extended Foster Care (AB 12) benefits—including Supervised Independent Living Placement (SILP) payments or payment from a THP-Plus FC program. Even if your SILP payment is sent directly to you, you DO NOT need to report this as income. This also includes the infant supplement.
- Welfare (CalWORKs) payments
- Untaxed Social Security benefits
- Supplemental Security Income (SSI) - do not confuse with Social Security Disability Insurance (SSDI)

\*There are other less common types of untaxed income that do not need to be reported. Check the “Help” page for “Other Untaxed Income” to see the complete list.

Student Untaxed Income

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

STUDENT INFORMATION

Did you have any of the following items in 2017? Enter amounts for all that apply.

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

\$  .00

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

\$  .00

Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement ?

\$  .00

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

\$  .00

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

\$  .00

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

\$  .00

PREVIOUS NEXT

Click "Yes" to skip questions about your assets.

If your income is over a certain threshold, you will instead be asked to provide information about your assets such as savings or investment accounts (pages not shown)

The screenshot displays the 'Student Assets' section of the FAFSA application. At the top, a progress bar shows the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics, Financial Information (active), Sign & Submit, and Confirmation. Below the progress bar, a blue banner reads 'STUDENT INFORMATION'. The main question is 'Do you want to skip questions about your assets?' with radio buttons for 'Yes' (selected) and 'No'. There are three buttons: 'CHECK FOR ERRORS' on the left, and 'PREVIOUS' and 'NEXT' on the right. A help icon (?) is also present. At the bottom, it says 'Site Last Updated: Sunday, September 30, 2018' and 'Download Adobe Reader'. The footer contains '©2010 fafsa.gov. All rights reserved.'

Option b).

If you select *“Not Going to File”*

IRS Income Tax Return

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If you did not have to file taxes, select this option. You will still be asked questions about any income you may have earned or received.

# FAFSA SECTION 5: FINANCIAL INFORMATION

Select "Not going to file" if, for example, you did not work or did not make enough money to require you to file taxes for the requested year.

If you are not going to file taxes, you may be required to submit an IRS Verification of Nonfiling Letter. This can be requested free of charge at [irs.gov/transcript](https://irs.gov/transcript) or by filling out IRS Form 4506-T. See your college financial aid department for assistance.

**TIP** **Unsure if you made enough money to file taxes?** Each year the income requirement is different. For example, in 2017 if you were single, under 65 and your gross income was at least **\$10,400**, then you needed to file a tax return.

**Gross income** = total income paid to you before any deductions or taxes were taken out.

The screenshot shows the FAFSA application progress bar with the following sections: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics, Financial Information (active), Sign & Submit, and Confirmation. A blue banner labeled "STUDENT INFORMATION" is visible. Below it is an information box: "Because the FAFSA belongs to the student, 'you' and 'your' always (unless otherwise noted) refer to the student." The main question is "For 2017, have you completed your IRS income tax return or another tax return?" with a dropdown menu set to "Not going to file". At the bottom are buttons for "CHECK FOR ERRORS", "PREVIOUS", and "NEXT".

### Income from Work

The student will be asked to provide how much money was earned from work.

### Student Income from Work

Progress bar: Student Demographics (✓), School Selection (✓), Dependency Status (✓), Parent Demographics, **Financial Information** (✎), Sign & Submit, Confirmation

**STUDENT INFORMATION**

How much did you earn from working (wages, salaries, tips, etc.) in 2017? ?

\$  .00

[← PREVIOUS](#) [NEXT →](#)

# FAFSA SECTION 5: FINANCIAL INFORMATION

## Additional Financial Info

If you received federal work-study, you must enter the information twice in the FAFSA so that it is subtracted when determining your total income. First, include the amount in the total provided when asked “How much did you earn from working?”

Also provide the amount in Additional Financial Info Section that says, “Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships”

### Student Additional Financial Info

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

**Did you have any of the following items in 2017? Enter amounts for all that apply.**

Child support you paid because of divorce or separation or as a result of a legal requirement. Do not include support for children in your household ?

\$  .00

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

\$  .00

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

\$  .00

[CHECK FOR ERRORS](#) [PREVIOUS](#) [NEXT](#)

## Untaxed Income

You **DO NOT** have to report the following information as income earned from working, or in the “Additional Financial Information” or “Untaxed Income” section:

- Extended Foster Care (AB 12) benefits—including Supervised Independent Living Placement (SILP) payments or payment from a THP-Plus FC program. Even if your SILP payment is sent directly to you, you **DO NOT** need to report this as income. This also includes the infant supplement.
- Welfare (CalWORKs) payments
- Untaxed Social Security benefits
- Supplemental Security Income (SSI) - do not confuse with Social Security Disability Insurance (SSDI)

\*There are other less common types of untaxed income that do not need to be reported. Check the “Help” page for “Other Untaxed Income” to see the complete list.

Student Untaxed Income

Student Demographics School Selection Dependency Status Parent Demographics **Financial Information** Sign & Submit Confirmation

STUDENT INFORMATION

Did you have any of the following items in 2017? Enter amounts for all that apply.

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

\$  .00

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

\$  .00

Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement ?

\$  .00

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

\$  .00

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

\$  .00

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

\$  .00

PREVIOUS NEXT

Click "Yes" to skip questions about your assets.

If your income is over a certain threshold, you will instead be asked to provide information about your assets such as savings or investment accounts (pages not shown)

The screenshot displays the 'Student Assets' section of the FAFSA application. At the top, a dark blue header reads 'Student Assets'. Below it, a progress bar shows the following steps: 'Student Demographics' (with a green checkmark), 'School Selection' (with a green checkmark), 'Dependency Status' (with a green checkmark), 'Parent Demographics' (with a pencil icon), 'Financial Information' (with a pencil icon), 'Sign & Submit' (with a blue L-shaped icon), and 'Confirmation' (with a blue L-shaped icon). A dark blue banner labeled 'STUDENT INFORMATION' is positioned above the main question. The question is 'Do you want to skip questions about your assets?' with a help icon (question mark in a circle) to its right. Below the question are two radio buttons: 'Yes' (which is selected) and 'No'. At the bottom of the form area, there are three buttons: 'CHECK FOR ERRORS' (with a left arrow icon), 'PREVIOUS' (with a left arrow icon), and 'NEXT' (with a right arrow icon). At the very bottom of the page, there is a footer with the text 'Site Last Updated: Sunday, September 30, 2018' on the left, '©2010 fafsa.gov. All rights reserved.' in the center, and 'Download [Adobe Reader](#)' on the right.

# Option c). If you select “*Will File*” IRS Income Tax Return

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Very few people will need to select this option. If you were required to file taxes, but missed the deadline, select this option.

# FAFSA SECTION 5: FINANCIAL INFORMATION



If you select "Will file" a tax return, indicate what your filing status will be when you do file.

A message will appear to confirm that you have missed the deadline to file taxes, but still plan to file an income tax return.

Click "OK" if this is true.

### Student Tax Filing Status

Progress bar: Student Demographics (✓), School Selection (✓), Dependency Status (✓), Parent Demographics, **Financial Information** (✎), Sign & Submit (L), Confirmation

**STUDENT INFORMATION**

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

**!** You indicated that you will file taxes. If you have missed the 2017 tax filing deadline of April 2018 but still plan to file a 2017 income tax return with the Internal Revenue Service (IRS), click "OK." Otherwise, change your answer.

For 2017, have you completed your IRS income tax return or another tax return?

**Will file** [OK]

For 2017, what will your tax filing status be according to your tax return?

Select

- Select
- Single
- Head of Household
- Married-Filed Joint Return
- Married-Filed Separate Return
- Qualifying Widow(er)
- Don't know

**Remember:** If a student selects "Will File" they must update their FAFSA once they have filed their federal income tax return.

## Student Financial Information:

Either use the prior year's taxes if the information is similar to provide estimates, or click "Income Estimator" for assistance estimating the adjusted gross income, and answer the remaining questions about income as accurately as possible.

Gross income = total income paid to you before any deductions or taxes were taken out.

To view the additional financial information screens that follow, see pages 61-67 of this guide.

The screenshot displays the 'Student IRS Info' section of the FAFSA application. A progress bar at the top shows the following steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (unchecked), Financial Information (active), Sign & Submit (unchecked), and Confirmation (unchecked). Below the progress bar, a blue banner reads 'STUDENT INFORMATION'. An information box contains the following text: 'You indicated you "Will file" a 2017 tax return. If your 2017 income is similar to your 2016 income, use your 2016 tax return to provide estimates for questions about your income. If your income is not similar, click **Income Estimator** for assistance estimating your adjusted gross income, and answer the remaining questions about your income to the best of your ability. Once you file your tax return, you **must** correct your FAFSA, changing 1) your filing status from "Will file" to "Already completed" and 2) your estimated answers to the final amounts on your 2017 tax return. At that time, you may be eligible to use the IRS Data Retrieval Tool to transfer your tax return information into the FAFSA.'

Below the information box, the form asks: 'What income tax return will you file for 2017?' with a dropdown menu showing 'IRS 1040A or 1040EZ'. The next question is: 'What was your adjusted gross income for 2017? This amount is found on IRS Form 1040A-line 21 or 1040EZ-line 4.' The input field shows '\$ 1,000 .00'. To the right of the input field is a button labeled 'INCOME ESTIMATOR'. Below the input field are three buttons: 'CHECK FOR ERRORS', 'PREVIOUS', and 'NEXT'. At the bottom of the page, it says 'Site Last Updated: Sunday, September 30, 2018' and 'Download [Adobe Reader](#)'. The copyright notice at the bottom reads '©2010 fafsa.gov. All rights reserved.'

# Sign & Submit Section

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The final section of the FAFSA!

# FAFSA SECTION 6: SIGN & SUBMIT

**READ ALL OF THE INFORMATION YOU PROVIDED CAREFULLY BEFORE YOU SIGN AND SUBMIT YOUR APPLICATION**

- Print, read and check the information on this screen. It is a summary of the information you provided on the FAFSA.
- Use the button at the bottom of the page to print a copy.
- If everything is ok, move on to the next page, where you will be asked to sign the FAFSA.

FAFSA Summary

Student Demographics ✓ School Selection ✓ Dependency Status ✓ Parent Demographics Financial Information ✓ Sign & Submit ✎ Confirmation

You're not done yet! You still need to submit your FAFSA. After you print this page, click **Next** to return to your FAFSA form.

2019-2020 FAFSA SUMMARY  
Student ID XXX-XX-3020 LA [Collapse All](#)

Student Demographics

| Student Demographic Information   |                       |
|---|-----------------------|
| <a href="#">Student's Last Name (question 1)</a>  | LASTNAME              |
| <a href="#">Student's First Name (question 2), Student's Middle Initial (question 3)</a>          | JOHN                  |
| Student's Social Security Number (question 8)   | XXX-XX-3020           |
| <a href="#">Student's Date of Birth (question 9)</a>  | 04/19/2000            |
| <a href="#">Male or Female? (question 21)</a>   | MALE                  |
| <a href="#">Student's Permanent Mailing Address (question 4)</a>                                  | 1122 STRAIGHT STREET  |
| <a href="#">Student's Permanent City (question 5)</a>   | LEESBURG              |
| <a href="#">Student's Permanent State (question 6), Student's Permanent ZIP Code (question 7)</a> | CALIFORNIA, 20705     |
| <a href="#">Has Student Lived in State for at Least 5 Years?</a>                                  | YES                   |
| Student's State of Legal Residence (question 18)  | CALIFORNIA            |
| Was Student a Legal Resident Before January 1, 2014? (question 19)                                | YES                   |
| Student's Legal Residence Date (question 20)  |                       |
| <a href="#">Student's Telephone Number (question 10)</a>  |                       |
| <a href="#">Student's E-mail Address (question 13)</a>  | newuser@fafsademo.com |
| <a href="#">Student's Marital Status (question 16)</a>  | I AM SINGLE           |
| Student's Marital Status Date (question 17)   |                       |
| <a href="#">Student's Driver's License Number (question 11)</a>                                   |                       |

# FAFSA SECTION 6: SIGN & SUBMIT

READ ALL OF THE INFORMATION YOU PROVIDED CAREFULLY BEFORE YOU SIGN AND SUBMIT YOUR APPLICATION

- Read and check the box indicating agreement with the signing statement and move onto the next page.

Agreement of Terms

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**STUDENT INFORMATION**

**READ BEFORE PROCEEDING**

By signing this application electronically using your FSA ID (username and password) and/or any other credential or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same period of time.

By signing this application electronically using your username and password and/or any other credential or

I, the student, agree to the terms outlined above.

Agree  Disagree

PREVIOUS NEXT

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- Click **“SIGN THIS FAFSA”** and then **“SUBMIT MY FAFSA NOW”**
- Since you entered your FSA ID to login to the FAFSA, you don't have to enter it again.

Signature Options

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

**Student Signature for**  
Social Security Number: XXX-XX-3020  
Last Name: Lastname  
Date of Birth: 04/19/2000

**SIGN THIS FAFSA**

SIGNATURE STATUS NEXT

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# FAFSA SECTION 7: CONFIRMATION

## This is your Confirmation Page to show that your FAFSA is submitted!

- If possible, print and save a copy of this page for your records.
- A copy will also be sent to you via email.
- If you need to make any changes, you must wait until you receive your Student Aid Report (SAR) or Student Aid Acknowledgement. This may take a few days to a few weeks after filing your FAFSA.



### Congratulations, John!

Your FAFSA was successfully submitted to Federal Student Aid.

**Confirmation Number:** F 12005166001 10/01/2018 17:0:2

Data Release Number ( [DRN](#)): 9999

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**What Happens Next**

- You will receive an e-mail version of this page.
- In 3-5 business days, you will receive an e-mail notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

An abbreviated version of your confirmation page has been sent to you at the e-mail address: [newuser@fafsademo.com](mailto:newuser@fafsademo.com)

[PRINT THIS PAGE](#) 

[Expand All](#)

∨ **Estimated** Expected Family Contribution (EFC) = 999999

- The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.
- The EFC is not how much aid you will receive or how much you have to pay for college.

**Estimated Eligibility Information**

- Based on the [eligibility criteria](#), you may be eligible for the following:
- [Pell Grant](#) Estimate - \$6,095.00
- [Direct Stafford Loan](#) Estimate - \$9,500.00
- You may also be eligible to receive other federal, state, or institutional grants, scholarships, and/or work-study.

In addition, you should learn about [federal tax benefits for education](#), including the *American Opportunity Tax Credit (AOTC)*.

∨ **Foster Care Information**

You reported that you are or were in Foster Care. **You may be eligible for assistance through federal programs for foster youth**, such as the John H. Chafee Foster Care Independence Program and/or the Education and Training Voucher (ETV) Program.

For more information contact your [state ETV coordinator](#).

∨ **School(s) on your FAFSA:**

# After the FAFSA

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## STUDENT INFORMATION

Welcome,

2019-2020

2018-2019

**Current Application Status: Processed Successfully**

Congratulations, your FAFSA was successfully processed.

## What Happens Next

- Your FAFSA information was made available to the school(s) you listed on your FAFSA.
- Your school(s) will use your FAFSA information to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or to discuss your financial aid award.
- If you have questions about your financial aid package contact your school(s).

## You can also:

- [View or Print your Student Aid Report \(SAR\)](#)
- [Make FAFSA Corrections](#) to make a change, add a school, or transfer IRS data into your FAFSA
- [Create a shareable file with some of your student information using MyStudentData Download.](#)

## Transaction History

## Original Application

- Submitted: 10/01/2018
- Processed: 10/02/2018

Once your FAFSA is processed (within a few days), it will be indicated when you log back into the FAFSA.

You can make a correction by choosing "Make FAFSA Corrections," or click to "View or Print your Student Aid Report (SAR)."

If you choose "Make FAFSA Corrections," you will be taken to a page asking for your FSA ID Username, FSA ID Password and Save Key.

Choosing "View or Print your Student Aid Report" will take you to a page asking for your FSA ID Username and FSA ID password. From there, you'll be able to view your SAR.

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**California College Pathways**  
cacollegepathways.org  
student.cacollegepathways.org

**John Burton Advocates for Youth**  
235 Montgomery Street, Suite 1142  
San Francisco, CA 94104  
Phone: (415) 348-0011  
info@jbay.org • jbay.org