FAFSA Steps for Completion

Lesson Plan

Lesson Objective:

- The learner will demonstrate understanding of the importance of completing the FAFSA.
- The learner will begin completing the FAFSA.

Materials:

- Computers for students and/or parents and Internet access to various websites
  - https://studentaid.ed.gov/sa/fafsa
  - www.fsaid.ed.gov
  - www.fafsa.ed.gov
- FAFSA Completion Steps handout

Introduction:

- The teacher will discuss the importance of a thorough, timely FAFSA submission by sharing the FAFSA Overview video with the students https://studentaid.ed.gov/sa/fafsa.

Instruction:

- Disseminate the FAFSA Completion Steps handout to students and/or parents.
- The teacher will discuss the importance of completing all the steps on the FAFSA and entering all information correctly and completely.
- Students and/or parents will work together to begin completing the FAFSA using the FAFSA Completion Steps handout.
- The teacher monitors parents and/or students as they navigate through the FAFSA.

Closure:

- The teacher will discuss the importance of a thoroughly completed FAFSA and how it can positively impact the student.
- Students who need additional information or parental input to have a fully submitted application will be encouraged to revisit the saved FAFSA form once the information is obtained.

FAFSA Completion Steps

❖ Create a FSAID. Go to www.fsaid.ed.gov to create a FSAID. Parents and students must have separate FSAIDs.

❖ Gather the following documents for student and parent:
  ➢ Social Security Number
  ➢ Alien Registration Number (if you are not a U.S. citizen)
  ➢ The most recent federal income return, w-2s, and other records of money earned (note: You may be able to transfer your federal tax return information into your FAFSA using the IRS Data Retrieval Tool)
  ➢ Bank statements and records of investments (if applicable)
  ➢ Records of untaxed income (if applicable)
  ➢ The FSA ID so you may sign the application electronically

❖ Go to the FAFSA website www.fafsa.ed.gov and select "Start a New FAFSA."
  ➢ Log in with your FAFSA ID (email address and password.)
  ➢ Select the academic year you plan to attend.
  ➢ You must create a save key for this application (note: The save key allows you to return to this application later or if you need to stop and save your application.)
  ➢ If your parents need to add or make changes to their information, they will need this save key to access the saved application.

❖ Section 1: Student Demographic Information
  ➢ Under this section, this information should already be filled in. This information was taken from your FSAID.
  ➢ If any of this information isn't correct, make the necessary changes and contact Federal Student Aid at 1-800-433-3243 for assistance.
  ➢ If the pre-filled information is correct, answer all questions that are not complete.
  ➢ Next, is the student eligibility section, which has questions about citizenship, high school completion, college grade levels and will the student have his/her first bachelor's degree before the beginning of the academic year on this application.
  ➢ There is a very important question for male students.
    ▪ If are not registered for Selective Service System, make sure you select to register yourself now through this application.
  ➢ Next is a question about foster care. If you the student were in foster care at any time indicate it on the application.
  ➢ Next is a question about being convicted for the possession or sale of illegal drugs as an offense that occurred while you were receiving federal student aid (grants, work-study, and/or loans.) You must answer this question.

- Lastly, you must confirm the high school you attended by entering the name, city and state where the high school is located. Then click confirm. The school should appear and click select.
- At this point, the application should tell you if you may qualify for federal student aid. Once you continue through the application, it will determine how much aid you can receive. Please save your application at this point.

- ❖ Section 2: School Selection Summary
  - This section focuses on the colleges you would like to receive your FAFSA application. You can add up to 10 schools.
  - If you have the school's federal school code, you can put it in or search by the school's name.
  - Once the school's information is available, put a check in the box next to the school's name and then click add. If you click view selected school information, it will provide statistical information from College Navigator.
  - Please save your application again.

- ❖ Section 3: Dependency Determination
  - This section is to determine if the student is dependent or independent.
  - The first question asks if the student was born before January 1, 1994. Answer yes or no.
  - Next, as of today, is the student married?
  - Will the student be working on a master's or doctorate degree program?
  - Does the student have children or will have children for whom they will provide more than half the children's support within the academic year?
  - Does the student have other dependents for which the student is providing more than half of their support?
    - Note: If yes, the school may ask for additional documentation.
  - Is the student a veteran of the U.S. Armed Forces?
  - At any time since the student turned age 13, were both of his/her parents deceased? Was the student in foster care, or was the student a dependent or a ward of the court?
  - As determined by the court in the student's state of legal residence, was the student considered an emancipated minor?
    - Note if yes, the school may ask for additional documentation.
  - Does the student have someone other than his/her parent or stepparent who has legal guardianship of him/her as determined by a court in the student's state of legal residence?
    - Note: the school may ask for additional documentation.
  - On or after July 1, 2016, was the student homeless or self-supporting or at risk of being homeless?

- ➢ If the student is determined to be dependent, then the application will move to the parent demographic information.
- ➢ If the student is determined to be independent then the application will move to the financial information section.
- ➢ Please save your application again.
- ➢ Section 3A: Dependent- Parent Information
  - ▪ If the student is determined to be a dependent student, then the parent would provide the information in this section.
  - ▪ The first question discusses the parents' marital status.
  - ▪ The next question discusses which parent information will be provided.
  - ▪ Next, is the parents' personal information such as social security number, last name, first initial of first name, and date of birth.
  - ▪ An accessible email address should be placed on the application.
  - ▪ Parents should use the same email address that was used to setup the FSAID.
  - ▪ Household size is next.
    - • Parents should include all children for whom they provide more than half of their support.
    - • This number should also include any children that are in college as well.
    - • If you parents are unsure of which family members to include, within the application they can click the household size button to get more information.
- ➢ Please save your application again.

- ❖ Section 4: Financial Information
  - ➢ This section is where students and parents will provide financial information.
  - ➢ Parents' financial information is first. Select if the parent has completed his or her IRS income tax return.
  - ➢ Next, select the parents' tax filing status. During this section parents are encouraged to use the IRS Data Retrieval Tool to transfer income tax return information from the IRS into the FAFSA.
  - ➢ Once parents transfer the tax information into the application, changes should not be made or it will invalidate the information retrieved.
  - ➢ If by chance parents recently completed their IRS income tax return for the tax year in question, they can skip using the IRS Data Retrieval Tool and enter tax information.
  - ➢ Please note that when the IRS Data Retrieval Tool isn't used students may be subjected to a verification process.
  - ➢ Last are questions about parents eligibility for any of the programs listed on the application. If so, check the box.
  - ➢ Complete the remaining questions about student and parent income.
  - ➢ Please save your application again.

- ❖ Section 5: Sign and Submit
  - ➢ At this point the application should be viewed to ensure all information is correct.
  - ➢ If something is incorrect, click on the question link next to the incorrect information and make changes.
  - ➢ After all changes are made, print out the application if available.
  - ➢ Save your application again.
  - ➢ Next, there is the question about a preparer.
    - ▪ What is a preparer?
      - • A preparer is anyone who charges a fee for helping you fill out your FAFSA. If a fee was paid to someone for advice or for completing this form, that person must complete this section. Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help complete the application, so they are not considered preparers unless they were paid for their services. If this doesn't apply then move to signing the application.
  - ➢ Please read the terms and conditions for signing the application.
  - ➢ If the student agrees, click the agree button.
  - ➢ The student FSAID will need to be added to sign.
  - ➢ The parent will need to add their FSAID as well.
  - ➢ Once the FSAIDs have been applied; click the "Submit My FAFSA Now Button."
  - ➢ After the FAFSA is submitted, print out the "Congratulations your FAFSA has been submitted" page.
    - ▪ This page has important information.
    - ▪ It will have the student EFC number along with information about the school listed on the FAFSA.
  - ➢ Next, the student will receive an email from Federal Student Aid within 48 hours on the FAFSA results.