

Supporting Students through the 2019-2020 FAFSA®: Guidance and Resources from Federal Student Aid

Claire Bucknor | 09.12.2018

Agenda

- The Future of FAFSA®
- FSA ID
- IRS DRT
- Dependency Status
- Breaking Down Barriers
- Student Scenarios
- FSA Resources

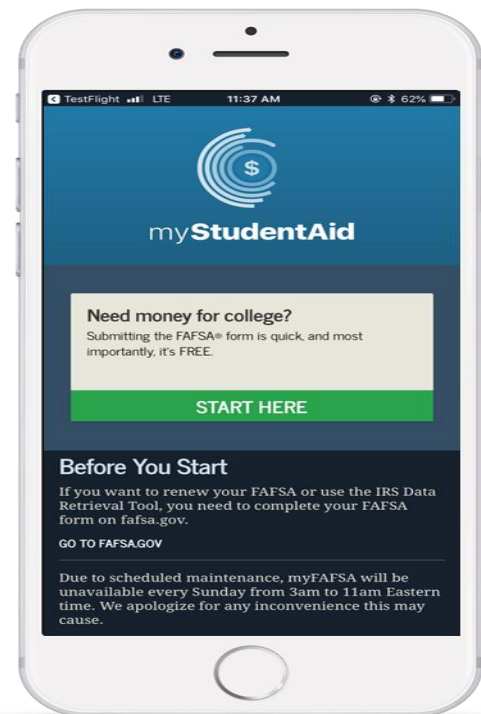
The Future of FAFSA®

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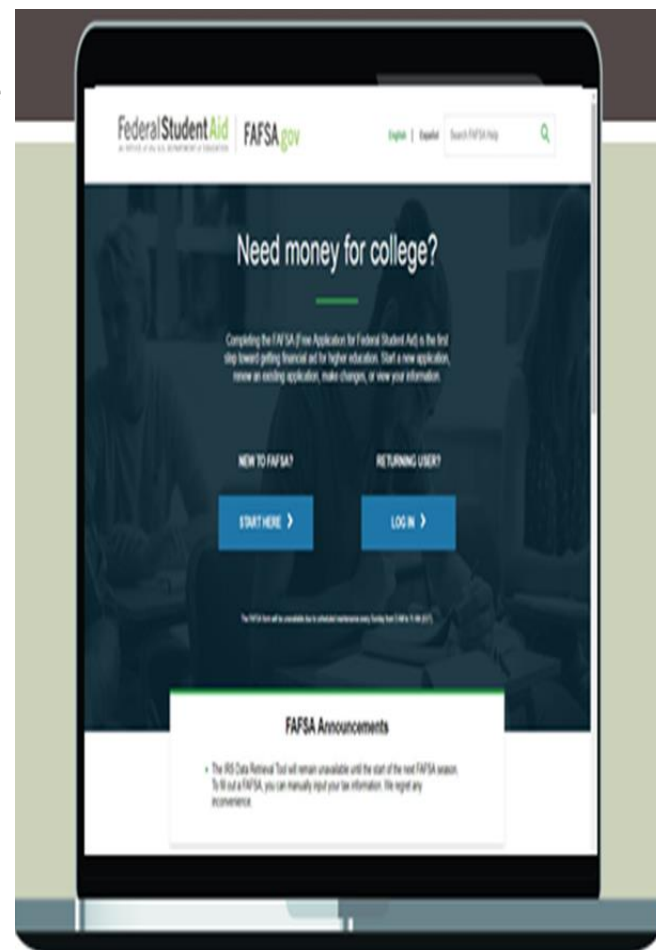
The Future of FAFSA®

There are two new ways to complete the FAFSA® form: a redesigned, mobile-friendly version of fafsa.gov and the mobile app myStudentAid.



Redesigned fafsa.gov

- The fafsa.gov website has been redesigned so that the site pages will fit the screen size and shape of devices such as smartphones or tablets.
- Students and parents can now complete the FAFSA form on a mobile device with the same ease as on a desktop or laptop computer.
- The questions are displayed in a more user-friendly way, with some now grouped in a different order to ease navigation through the site.





Need money for college?

Complete the FAFSA® (*Free Application for Federal Student Aid*) form to apply for financial aid for college, career school, or graduate school.

NEW TO FAFSA.GOV?

Submitting the FAFSA form is quick, and most importantly, it's FREE. Get started today.

START HERE >

RETURNING USER?

- Make a correction
- Add a school
- View your *Student Aid Report* (SAR)

LOG IN >

FAFSA ANNOUNCEMENTS

- The new 2018-2019 FAFSA (including the ready-to-use IRS Data Retrieval Tool) is here! FYI: Some states and schools have limited funds, so don't delay! To begin your application, click Start A New FAFSA.
- The IRS Data Retrieval Tool will remain unavailable for the 2017-2018 FAFSA form.



Get help filling out the FAFSA® form

Browse common questions and learn how to fill out the FAFSA form.

[GET FAFSA HELP →](#)



Find your state's FAFSA® deadline

State deadlines may be different than school and federal deadlines.

[SEARCH STATE DEADLINES →](#)



Browse videos and fact sheets

Find videos, checklists, fact sheets, and more to help you plan for college.

[BROWSE RESOURCES →](#)

Additional Resources

[LOOK UP A SCHOOL CODE →](#)

[GET A PDF OR PAPER FAFSA FORM →](#)

[GET AN FSA ID →](#)

Starting to think about college?

Compare colleges using the *College Scorecard* →

Get financial aid guidance at [StudentAid.gov](https://studentaid.gov) →

Estimate your federal aid using *FAFSA4caster* →



[Home](#) | [About Us](#)



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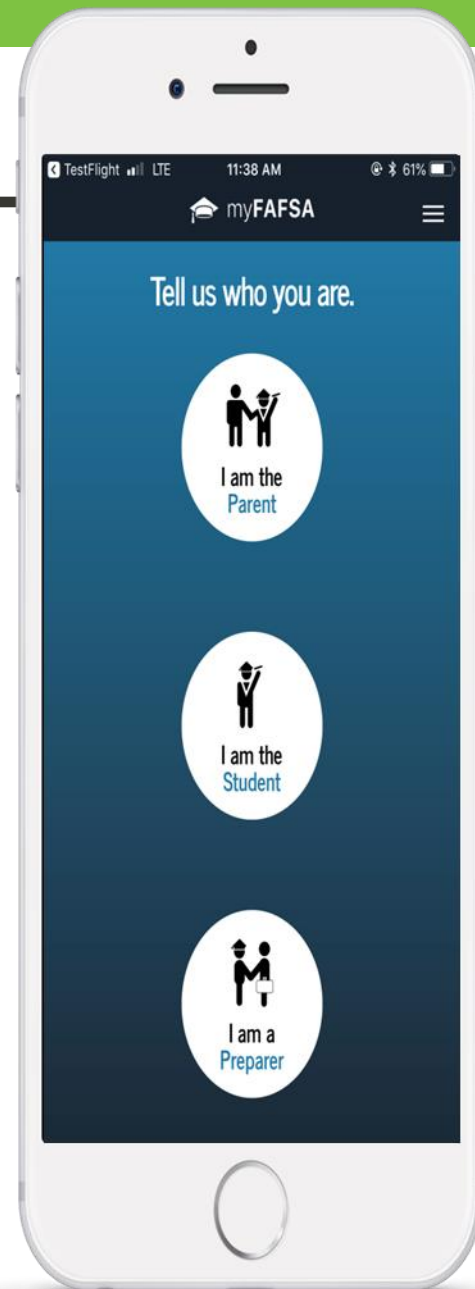
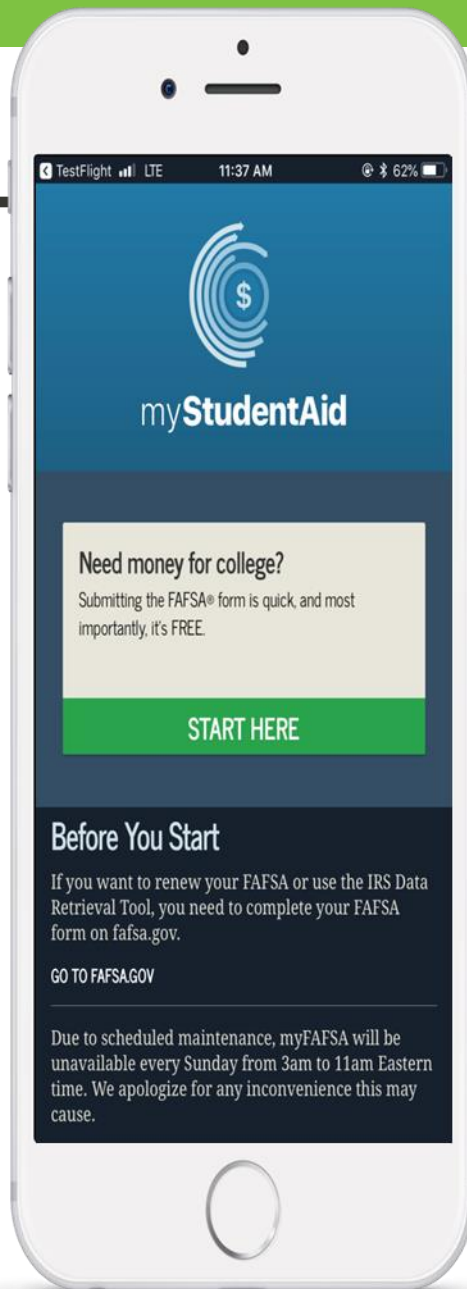
Site Last Updated: Friday, February 9, 2018

myStudentAid Mobile App

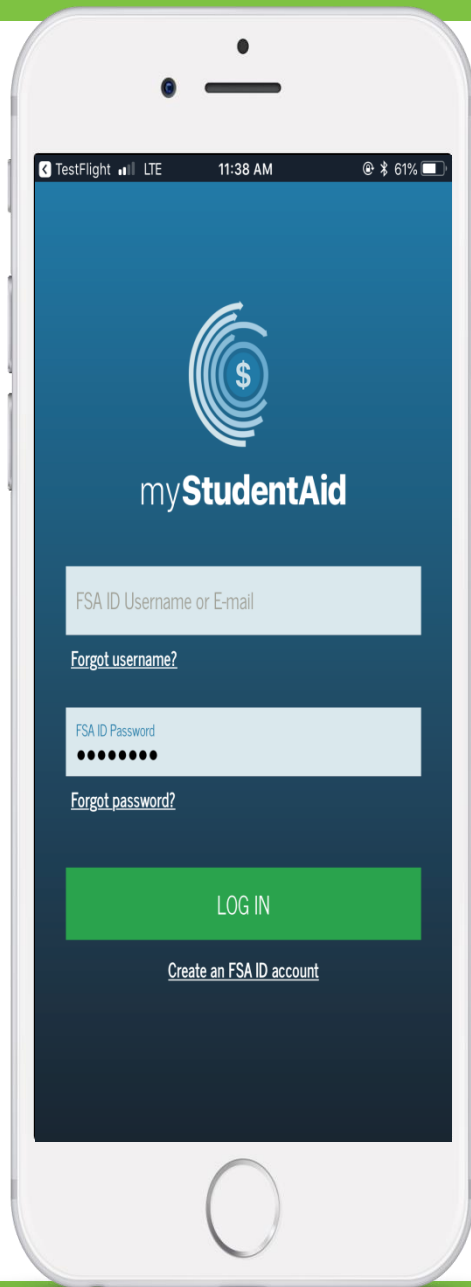
- Students and parents may now download the beta version of the **myStudentAid app** from the Apple App Store and Google Play. The **myFAFSA** component, which can be used to complete the FAFSA form, is currently the mobile app's featured function.
- This **initial release** of myFAFSA offers the following features:
 - ability to begin, complete, and submit a new FAFSA form for the 2018–19 FAFSA processing cycle
 - customized experience based on whether the user is a student, parent, or preparer
 - secure environment with the same data protections as fafsa.gov
- An enhanced version of myFAFSA will be released this fall and will include additional functionality such as the IRS DRT and Renewal Applications.

myFAFSA


- Making the FAFSA form accessible through a mobile device provides students and their parents with improved options for completing the form.
- myFAFSA's ability to customize the experience based on a specific role also makes it easier for students and parents to understand and complete the form.
- In addition, students and parents will have the ability to complete the FAFSA form on any device that they prefer.



Log In



TestFlight LTE 11:38 AM 61%



myStudentAid

FSA ID Username or E-mail

[Forgot username?](#)

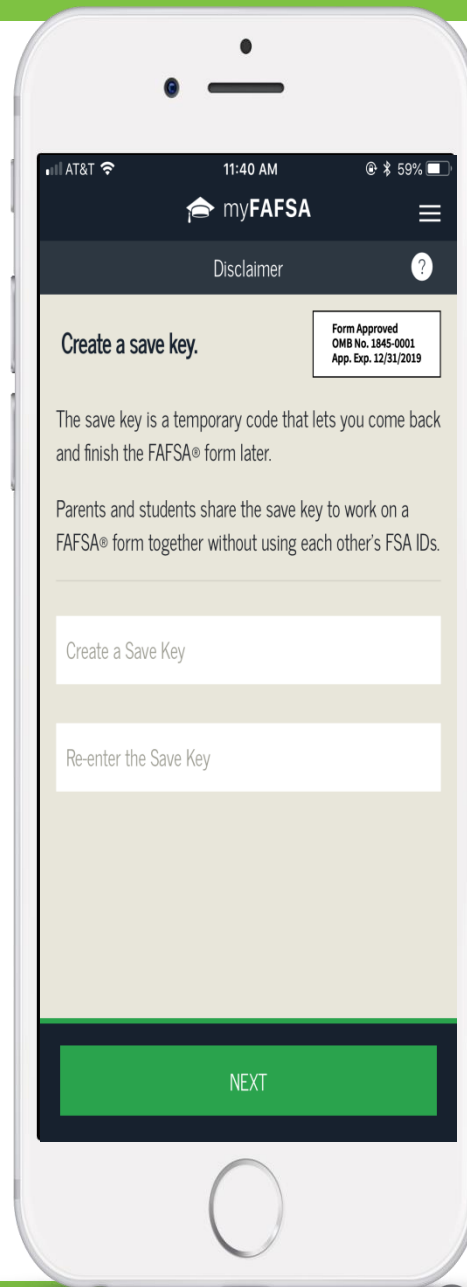
FSA ID Password

••••••••


[Forgot password?](#)

LOG IN

[Create an FSA ID account](#)



AT&T 11:40 AM 59%

 myFAFSA

Disclaimer

Create a save key.

Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2019

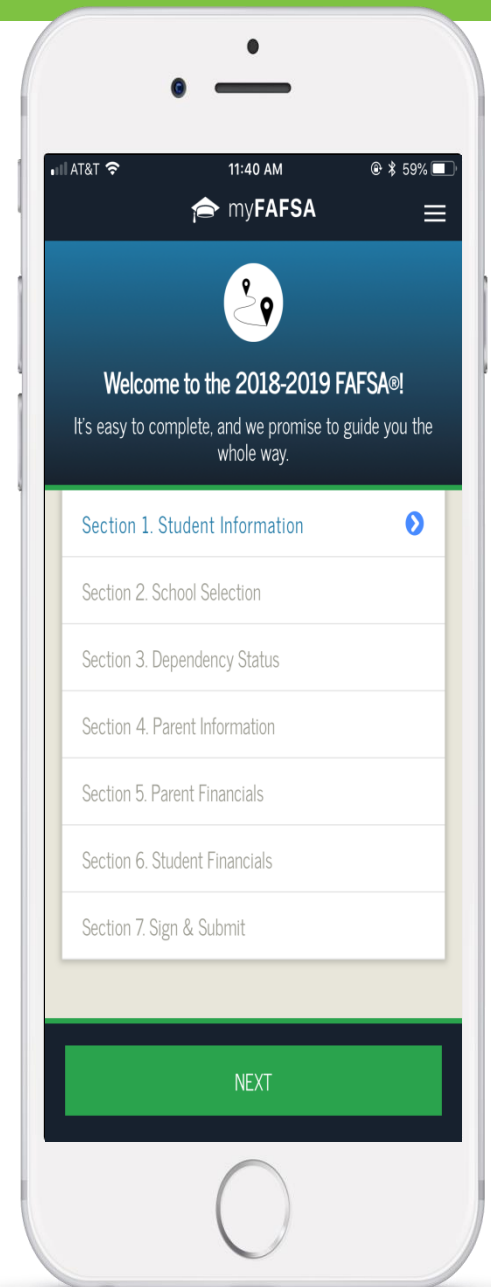
The save key is a temporary code that lets you come back and finish the FAFSA® form later.

Parents and students share the save key to work on a FAFSA® form together without using each other's FSA IDs.


Create a Save Key


Re-enter the Save Key

NEXT



AT&T 11:40 AM 59%

 myFAFSA



Welcome to the 2018-2019 FAFSA®!

It's easy to complete, and we promise to guide you the whole way.

Section 1. Student Information

Section 2. School Selection

Section 3. Dependency Status

Section 4. Parent Information

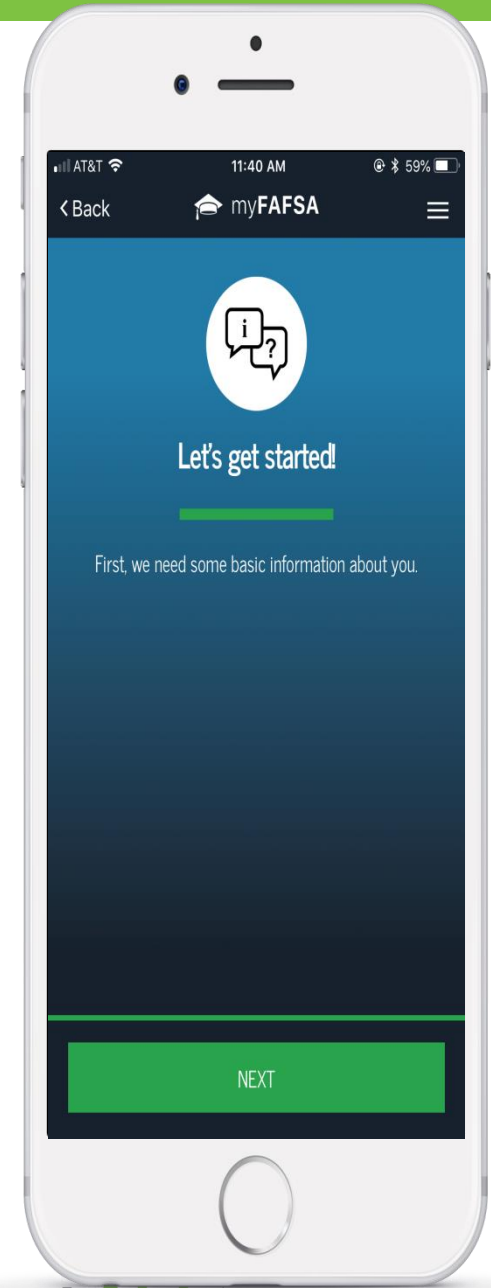
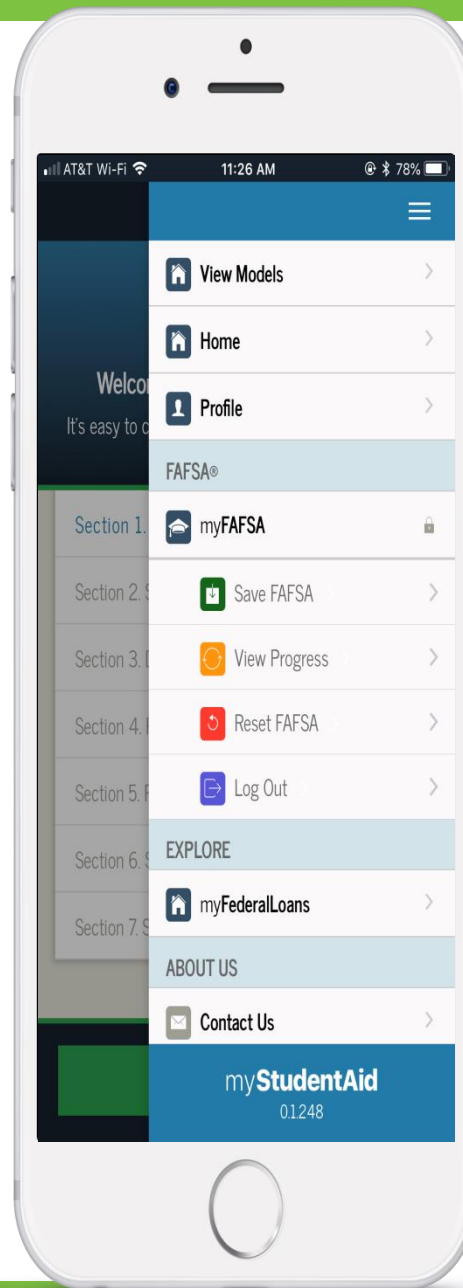
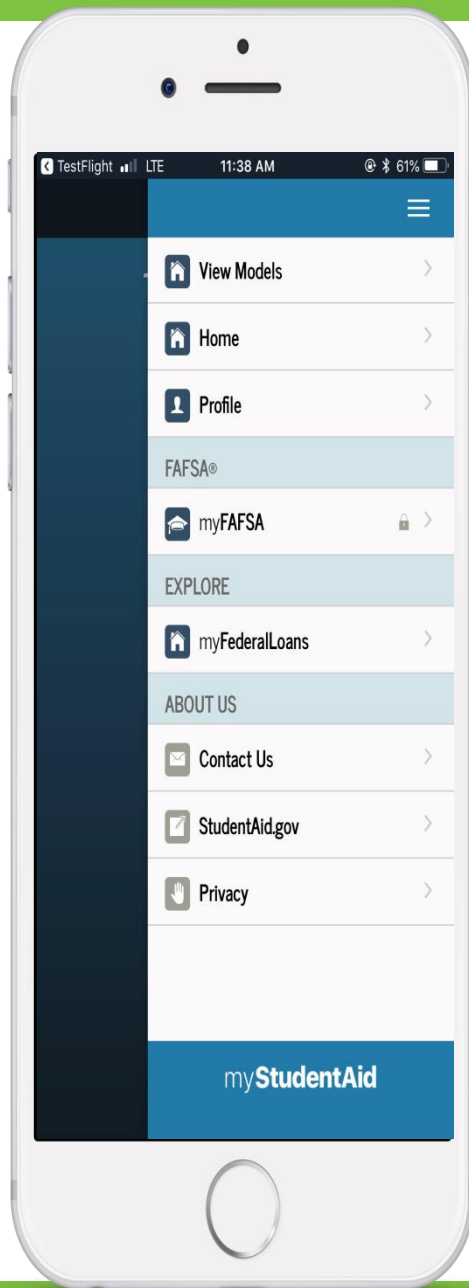
Section 5. Parent Financials

Section 6. Student Financials

Section 7. Sign & Submit

NEXT

Get Started



FSA ID

WHO NEEDS AN FSA ID?

- A student applying for aid
- One parent, if the student is considered dependent

More details at StudentAid.gov/fsaid

Frequently Asked FSA ID Questions

- **Do I need an email to create an FSA ID?**
 - No, an email is not required to create an FSA ID, but it is highly recommended.
- **What if I try to sign my FAFSA with an FSA ID and I get an error message?**
 - Your name must be typed exactly how it appears on your social security card on your FSA ID profile and FAFSA. Verify your name is spelled the exact same way in each place and make sure your DOB and SSN are correct as well.
- **Do I need a SSN to create an FSA ID?**
 - Yes, and your SSN, name, and DOB must all match with what the Social Security Administration has on file.
- **Can I still complete the FAFSA form without an FSA ID?**
 - Yes, you can print the signature page and mail it in.

IRS DRT

IMPORTANT INFORMATION: THE IRS DATA RETRIEVAL TOOL

Why can't I see
my own tax return
information?

Your tax return information is no longer visible because of added security and privacy protections. Not displaying your information prevents potential identity thieves from accessing it.



IMPORTANT INFORMATION:

THE IRS DATA RETRIEVAL TOOL

Q If I enter my tax information manually, will I be able to see it?

A Yes. Tax return information that's entered manually will be visible on fafsa.gov and on your Student Aid Report (SAR).

IMPORTANT INFORMATION: THE IRS DATA RETRIEVAL TOOL

Can I change the tax return information that I transfer into the FAFSA® form via the IRS DRT?

No. Information you transfer via the IRS DRT cannot be changed. Remember, the information transferred is coming from your filed 2016 tax return, so it should not need to be changed. If your financial situation has changed or you filed a 1040X amended return, contact your school's financial aid office to discuss whether it would be appropriate for the school to adjust the information on your FAFSA form.

Ineligible to Use IRS DRT

- The filer is **married**, and either the filer or his/her spouse filed as **Married Filing Separately**.
- The filer is **married**, and either the filer or his/her spouse filed as **Head of Household**.
- The parents' marital status is "**Unmarried and both parents living together.**"
- The filer filed a **Puerto Rican or foreign** tax return.

Dependency Status

GETTING FINANCIAL AID

THE FAFSA: WHAT YOU'LL NEED

- ♦ An FSA ID ([StudentAid.gov/fsaid](https://studentaid.gov/fsaid))
- ♦ Social Security number
- ♦ Alien registration number (if applicable)
- ♦ Cash, savings, and checking account balances
- ♦ Records of untaxed income
- ♦ Investments other than your home
- ♦ Federal tax information or tax returns
(Note: eligible applicants will be able to transfer (or import) this information into their FAFSA from the IRS)



Parents' Marital Status:	Provide Information for:
Married	Both of your parents
Remarried (after being widowed or divorced)	Parent and Stepparent
Unmarried and both legal parents living together	Both of your legal parents
Never Married	The parent that you lived with most during the last 12 months. If you did not live with one parent more than the other, provide information about the parent who provided more financial support during the last 12 months, or during the most recent year that you actually received support from a parent.
Divorced or Separated	The parent that you lived with most during the last 12 months. If you did not live with one parent more than the other, provide information about the parent who provided more financial support during the last 12 months, or during the most recent year that you actually received support from a parent.
Widowed	Your parent

FAFSA® Dependency Status

If any of the following criteria applies, the student is considered **independent**:

- ✓ 24 years or older
- ✓ Married
- ✓ Pursuing a Master's or Doctorate Program
- ✓ Children and you provide ½ support
- ✓ In foster care since turning the age of 13
- ✓ Emancipated minor
- ✓ Currently or was in legal guardianship
- ✓ Homeless or self supporting and at risk of being homeless
- ✓ Veteran or serving active duty in U.S. Armed Forces

Special Circumstances

- Some examples of special circumstances are:
 - Parents are incarcerated or deceased
 - Student left home due to an abusive family environment
 - Unsure of parents whereabouts or no contact with parents
- Circumstances must be well documented
- **Financial aid office determines dependency status**

Supporting Students in Special Circumstance

- Although the FAFSA form will be submitted, it will not be fully processed. The student will not receive an EFC and must immediately contact the financial aid office.
- The financial aid staff may ask for additional information to determine whether the student can be considered independent and have an EFC calculated without parent data.
- Advise your students to gather as much written evidence of their situation they can. Written evidence may include court or law enforcement documents; letters from a clergy member, school counselor or social worker; and/or any other relevant data that explains their special circumstance.

Breaking Down Barriers

**What are some of the barriers
to the financial aid and/or
FAFSA process for students and
parents?**

Common Barriers

- **Parents do not want to complete the FAFSA form** (mistrust or misunderstanding of the process)
- **Student or parent is undocumented** (student is not eligible for federal aid and/or parent thinks they cannot complete the form)
- **Student or parent has a complicated family or financial situation** (divorced parents, parents live abroad, don't file taxes, unable to use IRS DRT, student is homeless or in foster care etc.)
- **Technical issues with the FSA ID or FAFSA form** (SSN match issues, error messages, etc.)

Breaking Down Barriers

Parents do not want to complete the FAFSA form

Explain that the information reported on the FAFSA is only used to determine their student's eligibility for financial aid, by completing the FAFSA they are not obligated to pay their students expenses, and if they don't complete it their student is only eligible for unsubsidized loans from FSA.

Breaking Down Barriers

Student or parent is undocumented

If a student is undocumented they do not qualify for federal student aid, but they can work with their counselor to find state, institutional, and outside sources for financial aid. If the parent is undocumented they can complete the FAFSA by using 000-00-0000 in place of the SSN and they must print, sign, and mail in the signature page.

Breaking Down Barriers

Student or parents have a complicated family or financial situation

There are many resources that help families determine who the [reporting parent\(s\) is on the FAFSA](#) and how to report financial and tax information for [parents living abroad](#). Also, you are [not required to file taxes or use the IRS DRT](#) in order to complete the FAFSA. Call 1-800-4-FEDAID to get help with difficult situations.

A student is not required to provide parent information if they are considered an [independent student](#). There is guidance on our website to help students in these [special circumstances](#) get the support they need to get through the FAFSA process and work with the financial aid office.

Breaking Down Barriers

Technical issues with the FSA ID or FAFSA form

There are plenty of resources to for technical assistance: [website](#) with FAQs, [YouTube videos](#), recorded webinars, electronic handouts, and [customer service reps at that can be reached via live chat, email, and phone.](#)

Student Scenarios

Scenarios

My parents do not want to provide their information on the FAFSA form and are not going to contribute to my college expenses. Is this considered a special circumstance?

Answer: No. However, in situations where your parent refuses to provide their information on the FAFSA and refuses to provide you with any financial support, there is an exception that allows a student to submit the FAFSA without parental information and receive an Unsubsidized Loan only.

Scenarios

I live at home with my mother and stepparent. I know I need to report information about my mother, but do I need to provide information about my stepparent?

Answer: Yes. If you have a stepparent who is married to the legal parent whose information you're reporting, you must provide information about that stepparent as well.

Scenarios

I am the grandmother and legal guardian of a student. Can I fill out the FAFSA form in place of the parent?

Answer: No. Only legal parents (biological, adoptive, as determined by the state) should report parental information on the FAFSA form. Also, being in legal guardianship determined by the court makes this student an independent student who is **not** required to provide parental information on the FAFSA form.

Scenarios

“I am a student and my parents are divorced. Do both of my parents need to complete a FAFSA?”

Answer: If your parents are divorced or separated and don't live together, answer the questions about the parent with whom you lived more during the past 12 months. If you lived the same amount of time with each divorced or separated parent, give answers about the parent who provided more financial support during the past 12 months.

FSA Resources

FinancialAidToolkit.ed.gov

Site structured around four main content areas:

- Learn About Financial Aid
- Conduct Outreach
- Get Training
- Search Tools and Resources

The screenshot shows the homepage of the Financial Aid Toolkit. At the top, there is a navigation bar with links for 'ABOUT US' and 'STUDENTAID.GOV', and a search bar. Below this is the main header with the 'Federal Student Aid' logo (An OFFICE of the U.S. DEPARTMENT of EDUCATION) and the 'Financial Aid Toolkit' title. A secondary navigation bar contains four main sections: 'Learn About Financial Aid', 'Conduct Outreach', 'Get Training', and 'Search Financial Aid Tools and Resources'. A central banner reads: 'Help students and parents prepare for college and career school. The online source of federal student aid information and outreach tools for counselors, college access professionals, nonprofit mentors, and others.' Below the banner are four content cards, each with a photo and a description: 1. 'LEARN ABOUT FINANCIAL AID' with a photo of a man and a woman looking at a laptop; 2. 'CONDUCT OUTREACH' with a photo of a woman speaking at a podium; 3. 'GET TRAINING' with a photo of a man in a blue shirt; 4. 'SEARCH TOOLS AND RESOURCES' with a photo of a woman looking at a screen. At the bottom, there is an 'ANNOUNCEMENTS' section with a link to 'LEARN ABOUT FINANCIAL AID'. The footer contains links for 'FOIA', 'Privacy', 'Notices', 'usa.gov', 'ed.gov', 'whitehouse.gov', 'Contact Us', and 'Leave Us Feedback', along with social media icons for Facebook, Twitter, and YouTube.

ABOUT US | STUDENTAID.GOV | Search

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Financial Aid Toolkit

Learn About Financial Aid | Conduct Outreach | Get Training | Search Financial Aid Tools and Resources

Help students and parents prepare for college and career school.
The online source of federal student aid information and outreach tools for counselors, college access professionals, nonprofit mentors, and others.

LEARN ABOUT FINANCIAL AID
Understand the basics of federal student aid and the FAFSA, and get updates on the tools you need to educate the students you work with.

CONDUCT OUTREACH
Get sample financial aid night agendas and PowerPoint presentations, as well as suggested messages for social media, e-mails, or newsletters.

GET TRAINING
Find training or conference opportunities and learn about the National Training for Counselors and Mentors (NT4CM) program.

SEARCH TOOLS AND RESOURCES
Sort available Financial Aid Toolkit resources by content, audience, topic, and time of the year.

ANNOUNCEMENTS | [LEARN ABOUT FINANCIAL AID](#)

FOIA | Privacy | Notices | usa.gov | ed.gov | whitehouse.gov | Contact Us | Leave Us Feedback

f t y

Social Media Outreach

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Financial Aid Toolkit

Learn About Financial Aid

Conduct Outreach


Get Training

Search Financial Aid Tools and Resources

Help students and parents p

The Financial Aid Toolkit provides fe

professionals, nonprofit mentors, an



LEARN ABOUT FINANCIAL AID

Understand the basics of federal student aid, the FAFSA, and loan repayment

Host an Event


Make a Presentation

Targeting Your Outreach

Social Media Outreach

Articles and E-mails

Public Service Announcements




CONDUCT OUTREACH

Get tips on hosting events; sample financial aid night PowerPoint presentations; and

ool.

reach tools for counselors, college access




How to Use Federal Student Aid's Twitter Feed

How to Use Federal Student Aid's Facebook Page

How to Use Federal Student Aid's Youtube Channel

How to Use Federal Student Aid's Infographics



SEARCH TOOLS AND RESOURCES




opportunities and

Search our resource library by content, audience, topic, and time of year

ANNOUNCEMENTS

CORINTHIAN COLLEGES - INFORMATION ON EVEREST HEALTH

FOIA | Privacy | Notices | Plug-ins and Viewers | usa.gov | ed.gov | whitehouse.gov | Contact Us | Leave Us Feedback



Finding Resources on the Toolkit

“Search Tools & Resources” section

- Use filter search
- Browse all
- Subscribe to RSS feed

The screenshot shows the 'Financial Aid Toolkit' search interface. At the top, it features the 'Federal Student Aid' logo and the text 'PROUD SPONSOR of the AMERICAN MIND®'. Below the header is a navigation bar with links: 'Learn About Financial Aid', 'Conduct Outreach', 'Get Training', and a search bar labeled 'Search Financial Aid Tools and Resources'. The main content area includes a search instruction: 'Search for tools and resources to help you or your students learn about financial aid for college. Filter resources by file type, audience, topic, and the time of year the resource is most relevant.' It then provides a detailed search filter section with four dropdown menus: 'I AM LOOKING FOR' (Resource Type), 'TO HELP' (Audience Type), 'LEARN ABOUT' (Topic), and 'DURING' (Time of Year). Each dropdown has a 'Selected Options' box below it. To the right of these filters is a 'GET RESOURCES' button with a link to 'Clear Selection'. Below the filters, the 'Your Search Results' section states 'Your search resulted in 5 results.' and provides instructions on how to sort the results. The results are listed in a table-like format, showing the title, description, resource type, and related resources for three videos: 'After the FAFSA: What Happens Next Video', 'FAFSA Overview Video', and 'FAFSA: Determining Dependency Status Video'. Each result includes a 'Download Video' icon and a 'Spanish Captioned' link.

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Financial Aid Toolkit

Learn About Financial Aid Conduct Outreach Get Training Search Financial Aid Tools and Resources

Home » Search Financial Aid Tools and Resources

Search for tools and resources to help you or your students learn about financial aid for college.
Filter resources by file type, audience, topic, and the time of year the resource is most relevant.

Use the search tool below to filter our Financial Aid Toolkit resources to find just what you need. You can select one or more options in each dropdown box. If you don't select any options from a dropdown box, that box will default to all options being selected.

You may need certain [plugins or viewers](#), such as Adobe Reader, to view some resources.

Would you like to know each time we add a resource to the site? Subscribe to our RSS feed.

I AM LOOKING FOR TO HELP LEARN ABOUT DURING

Resource Type Audience Type Topic Time of Year

Selected Options: Selected Options: Selected Options: Selected Options:

Videos High School Students FAFSA All

GET RESOURCES or Clear Selection

Your Search Results

Your search resulted in 5 results. If you'd like to get more results, try broadening your search by selecting more criteria in the dropdown filter boxes.

The resources below are, by default, listed in alphabetical order. To change the order to sort the resources by Resource Type, please select the "Resource Type" radio button below.

Please note that a resource could be classified as more than one Resource Type but will appear just once in the list below.

Sort results by:

☒ Resource Title ☐ Resource Type

Download Video

[After the FAFSA: What Happens Next Video](#)

Description: Learn what happens after you complete the FAFSA, including information about the Student Aid Report, EFC, the role of schools, award letters, and receiving aid.

Resource Type: Videos

Also Available in: [Spanish Captioned](#)

Related: [Responsible Borrowing Video](#), [Student Loans: Avoiding Deceptive Offers](#)

Download Video

[FAFSA Overview Video](#)

Description: Provides an overview of the Free Application for Federal Student Aid (FAFSA) and the application process.

Resource Type: Videos

Also Available in: [Spanish Captioned](#)

Related: [How to Fill Out the FAFSA Video](#), [After the FAFSA: What Happens Next Video](#)

Download Video

[FAFSA: Determining Dependency Status Video](#)

Description: Walk through the criteria for determining whether a FAFSA applicant is an independent or dependent student.

Resource Type: Videos

Also Available in: [Spanish Captioned](#)

Connect With Us!

Social Media



StudentAid.gov

1-800-4FED-AID



E-mail Us

You can email us anytime.



Chat with Us

Ask a live agent your questions via a web chat.



Call Us

1-800-4FED-AID

(1-800-433-3243)

International Caller? Can't make a toll-free call?

1-334-523-2691

Hours of Operation

Monday–Friday
8 a.m.–11 p.m. Eastern time (ET)

Saturday–Sunday
11 a.m.–5 p.m. Eastern time (ET)

We are closed on federal holidays, the day after Thanksgiving and on December 24th.

We are open on New Year's Day, Martin Luther King Jr.'s Birthday, and Washington's Birthday from 11 a.m.–5 p.m. ET.

Hearing Impaired?
TTY calls only.
1-800-730-8913



**GOT A QUESTION
ABOUT THE FAFSA?**