

New Aid Officer Workshop

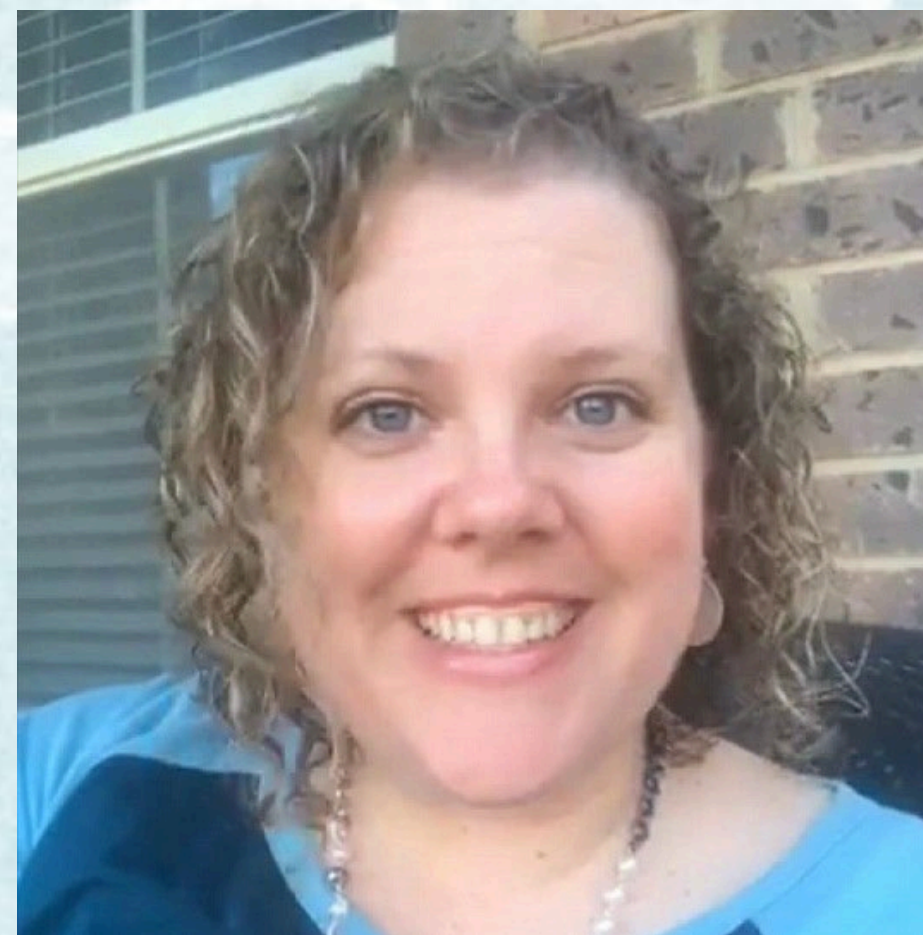


April 10-12, 2024 · Great Wolf Lodge · Dallas/Grapevine

Act 1:

FAFSA and Student Eligibility

Presenters



Melissa Jones

**Assistant Director of Financial Aid
University of Mary Hardin-Baylor**

Student Eligibility

- **File a Free Application for Federal Student Aid (FAFSA)**
- **Meet general and program-specific criteria**
 - **Prior to processing or disbursing aid**
 - **Schools may not impose additional eligibility requirements for the Title IV aid not established in the law or regulations**



General Eligibility Criteria



US Citizen or Eligible Non-Citizen
Not in default on Title IV loan
Do not owe Title IV Overpayment
Aggregate loan limits not exceeded
Maintain Satisfactory Academic Progress (SAP)

**Selective
Service?**

The Big Picture

- 1. Submit the FAFSA**
- 2. Application goes through database matches**
- 3. FPS sends the ISIR to the School**
 - **New for 24-25 - FAFSA Processing System (FPS)**
- 4. School matches ISIR to Student Record and completes criteria checks/documentation**
- 5. Financial Aid eligibility determined**



FSA ID

Federal Student Aid
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

UNDERSTAND AID ▾

APPLY FOR AID ▾

COMPLETE AID PROCESS ▾

MANAGE

- **Username/Password to access US Dept of ED systems**
- **Legal signature for electronic documents for Contributors**
 - Student (Spouse - if applicable)
 - Parent
 - Borrower
- **www.studentaid.gov**
 - **FSA recommends creating the FSA ID 3 days prior to completing the FAFSA**

Create an Account

Whether you're a student, parent, or borrower, you'll need to create your own account to apply for, receive, and manage your federal student aid.

Get Started

Already have an account? [Log In](#)

What You Can Do With Your Account

You must have an account to do the following:

- Fill out the *Free Application for Federal Student Aid (FAFSA®)* form online
- Complete other online forms (such as the *Master Promissory Note*) required to receive aid
- Review the federal student aid you've received

What You'll Need

- Your Social Security number (if applicable)
- Your own email address

Who is my Contributor?

PARENT INFORMATION

Whose Information Should I Provide?



For additional assistance determining what parent information to report on the FAFSA® form, refer to *Who's my Parent When Filling Out the FAFSA form?* fact sheet.

Since you have been identified as a dependent student, you will need to provide information about your parent(s). You must identify and report information about your parent(s) even if you don't live with him or her. Use the following criteria to determine whose information you should report in the "Parent Demographics" and "Parent Financials" sections of the FAFSA® form:

My parents live together (married or unmarried).

My parents are divorced or separated, and I live with one parent more than the other.

My parents are divorced or separated, and I live with both parents equally.

I was legally adopted.

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[Is my parent a contributor?](#) [Flow Chart](#)



Common FSA ID Problems

Forgot Username

Forgot Password

Used parent's email & student's SSN

Problem with the student's SSN

**Have you seen
any other FSA ID
problems?**





The FAFSA Application

The Application

- **Free Application for Federal Student Aid (FAFSA)**
- **Opens each year on October 1st**
- **Apply through:**
 - **FAFSA on the Web**
 - **Paper FAFSA**



What does your school do to promote FAFSA opening?

FAFA Result Student Aid Index (SAI)

Is replacing EFC (Expected Family Contribution)

An index number used to determine a student's eligibility for federal student aid

Calculated according to a formula established by law

The same at all schools

Paper FAFSA

Fillable **PDF Form**

Great resource to help answer questions

Similar information as the pop-up help from FAFSA on the Web

FAFSA on the Web pop-up help corresponds to question numbers



FAFSA® Form July 1, 2024 – June 30, 2025
Free Application for Federal Student Aid Federal Student Aid
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

Use this form to apply free for federal and state student grants, work-study, and loans. Or apply free online at fafsa.gov.

Apply by the Deadlines
For federal aid, submit your application as early as possible, but no earlier than **December 2023**. We must receive your application no later than **June 30, 2025**. Your college must have your correct, complete information by your last day of enrollment in the 2024–25 school year.
For state or college aid, the deadline may be as early as December 2023, and you may need to complete additional forms. Check with your high school counselor or a financial aid administrator at your college. See the state deadlines on page 2. If you are applying close to a deadline, we recommend you submit your FAFSA form online at fafsa.gov. It's the fastest and easiest way to apply for aid.

Fill Out the FAFSA® Form
The FAFSA form has five sections: Student, Student Spouse, Parent, Parent Spouse or Partner, and Preparer. To determine who needs to provide their information, consult "Who must provide information on the FAFSA form?", on page 3.
You may fill the answer fields electronically and then print the form, or print the form first and complete it by hand. If you complete the form by hand, use dark ink and write clearly, as shown below. A computer will process this form; therefore:

- Fill in both circle and square answer fields completely: Correct ● ■ Incorrect ⊗ ⊙ ⊗ ⊙
- For circle answer fields, choose only one response; for square answer fields, choose all that apply: ○ ● ○ ■ □ ■
- Print in BLOCK CAPITAL letters and skip a box between words; for multi-line responses, wrap any incomplete words onto next line: 1 4 1 6 P L U M S Continue on next line.
T A P T 4
- Report dollar amounts such as \$12,356.41 without cents; if negative, completely fill the circle (⊖) before the answer box: ⊖ \$ 1 2 3 5 6

Refer to the notes on pages 21–22 as instructed.
For help in filling out the FAFSA form, go to StudentAid.gov/fafsaahelp or call 1-800-4-FED-AID (1-800-433-3243). If you need assistance in another language, visit StudentAid.gov/apply-for-aid/fafsa/filling-out/request-interpretor.

Special Circumstances
If you or your family experienced significant changes to your financial situation (such as loss of employment or pay cuts), or other special circumstances (such as tuition expenses at an elementary or secondary school or high unreimbursed medical or dental expenses), complete and submit this form as instructed. Once you submit the form, discuss your special circumstances with the financial aid office at the college(s) you applied to or plan to attend.

Mail Your FAFSA® Form
After you complete this application, make a copy of pages 7 through 20 for your records. Then mail the original of pages 7 through 20 to:
Federal Student Aid Programs, P.O. Box 70204, London, KY 40742-0204
Extra postage will be required. After your application is processed, you will receive a summary of your information in your FAFSA Submission Summary. If you provide an email address, your summary will be sent by email within three to five days. If you do not provide an email address, your summary will be mailed to you within three weeks. If you would like to check the status of your application, go to StudentAid.gov or call 1-800-433-3243.

FAFSA is a registered trademark of Federal Student Aid, U.S. Department of Education.

2024–25 FAFSA® Form 1

FAFSA on the Web (2024-25)

English or Spanish

Pop up Help

**Mandatory Federal Tax
Information Approval
(FA-DDX)**

Pop up Chat

Electronic Signatures

Skip Logic

Real Time Submission

Edit Checks

Online Status Update

Experiencing Technical Issues

Videos for Assistance



FA DDX

Stands for: FUTURE Act Direct Data Exchange

What it does: Transfers IRS data into the FAFSA directly without the contributor seeing or manipulating the data

Requires FAFSA Federal Tax Information Approval, which is: Formal approval granted by an applicant and any applicable contributors for a given FAFSA cycle to retrieve and use Federal Tax Information (FTI) to determine an applicant's federal financial aid eligibility



Tax Information and Consent

Applicant and Contributor(s) (if applicable) must provide approval once each year.

If FAFSA FTI approval is not provided, the student will not be eligible for any Title IV aid until the approval is provided by each contributor



FAFSA Partner Portal



The new FAA Access site.

Financial Aid Administrators are no longer able to submit FAFSAs on behalf of students.

<https://fafsa.partnerportal.ed.gov/#/home>

FAFSA Partner Portal

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

Welcome to FAFSA Partner Portal

FAFSA Partner Portal is a new website for financial aid administrators available for the 2024-2025 award year. To access 2023-2024 student information, go to [FAA Access to CPS Online](#).

Start here

Enter your 5 character alphanumeric TG Number to start the login process.

TG	<input type="text" value="TG Number"/>	<input type="button" value="Log In"/>
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A feature-rich toolkit for Financial Aid Administrators



Applicant View

Applicant View displays the processed applicant data.
Coming Soon: the ability to compare up to four transactions, and correct transaction data.



Coming Soon Verification of Identity

The Verification of Identity feature allows a user to provide the required results of verification for students selected to verify their identity (Verification Tracking Group V4 or V5).



Coming Soon ISIR Request

The ISIR Request feature allows a user to request a single ISIR or a specified group of ISIRs from the FAFSA Processing System.

Stepping through the 2024025 FAFSA

FAFSA[®] FORM
2024-25

Student

Understanding the FAFSA[®] Form

1 of 4

What is the FAFSA[®] form?

Use the *Free Application for Federal Student Aid* (FAFSA[®]) form to apply for grants, scholarships, work-study funds, and loans for college or graduate school.



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Understanding the FAFSA[®] Form

2 of 4

Contributors to the FAFSA[®] Form



Parents or Spouses

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

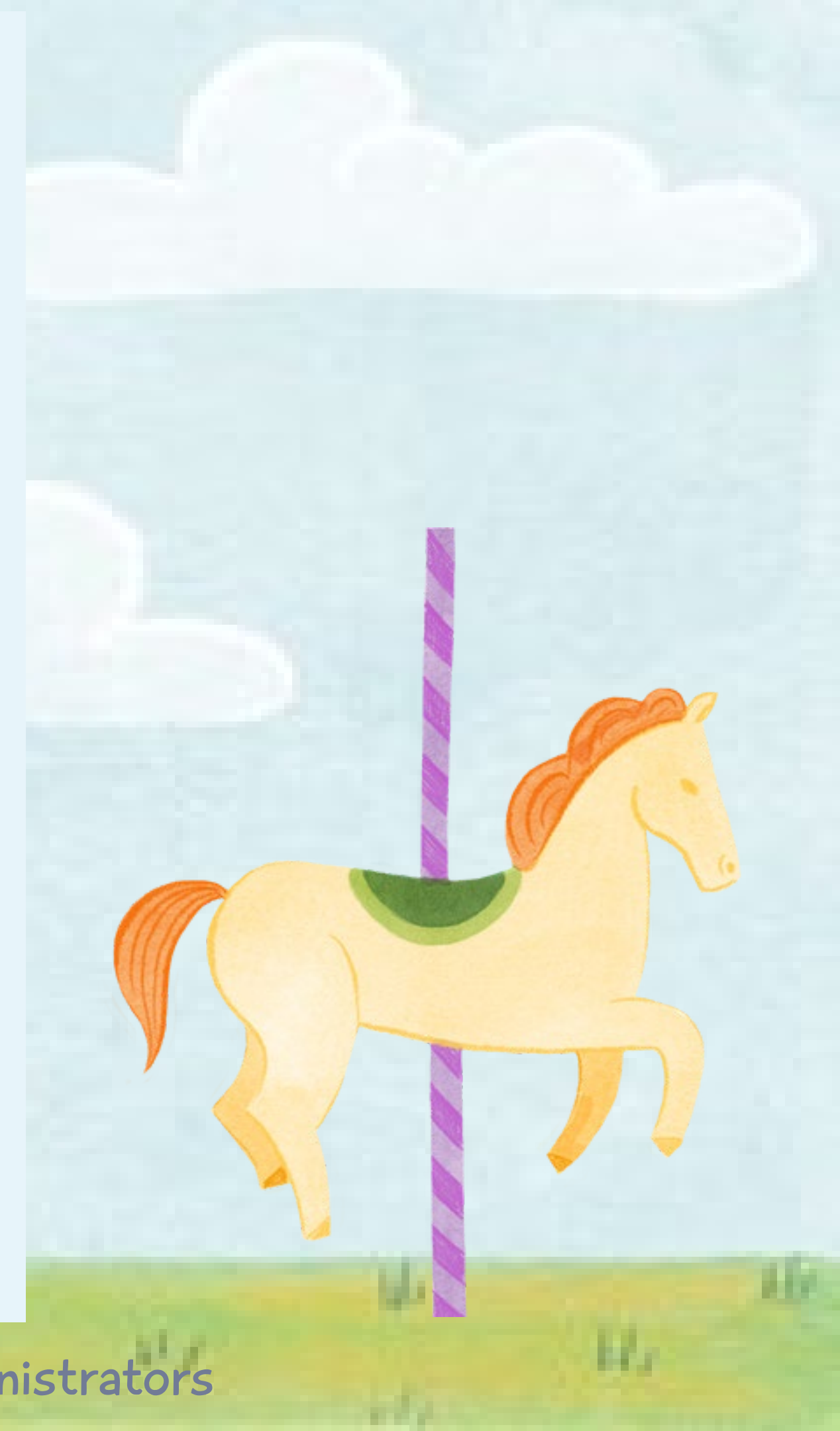
How To Invite

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

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

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Continue



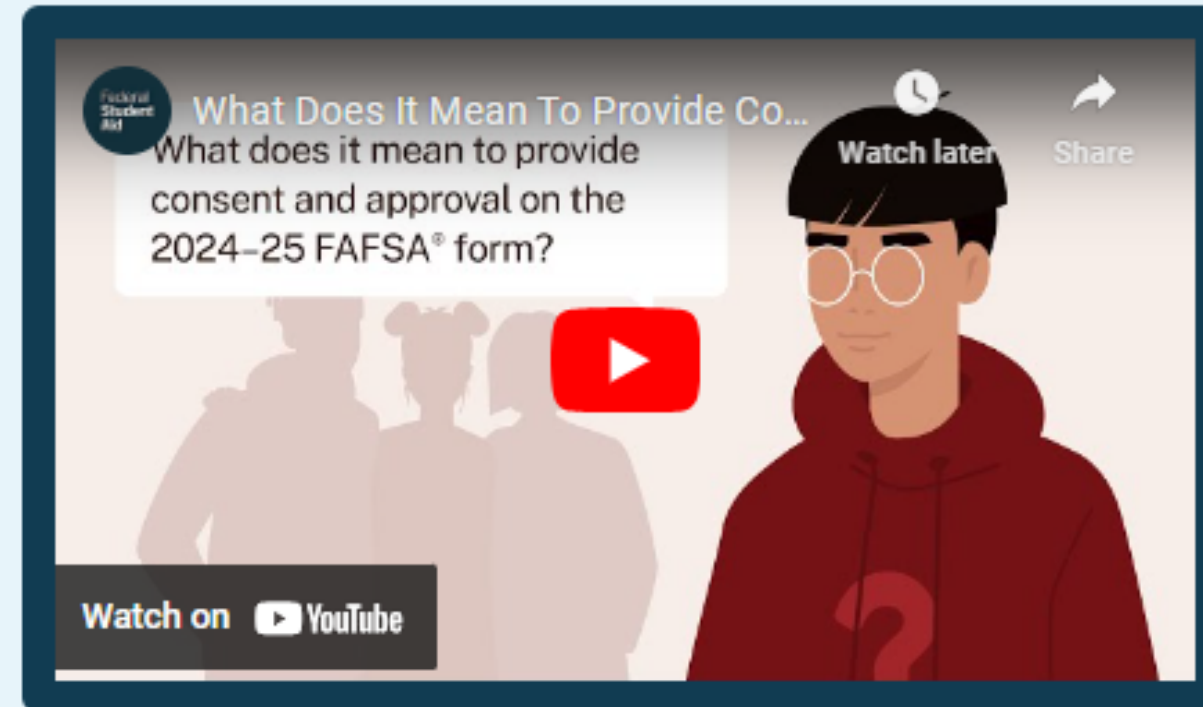
Understanding the FAFSA[®] Form

3 of 4

What To Expect

How long will this take? ⌚ 1 hour

Every contributor must provide consent and approval for you to be eligible for federal student aid. With your consent and approval, we can obtain your federal tax information automatically from the IRS to help you complete the FAFSA[®] form. You can save the form and return to it later if you need more time.



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Understanding the FAFSA[®] Form

4 of 4

After Submitting the FAFSA[®] form

After completing the FAFSA[®] form, you will receive a confirmation with preliminary information related to your eligibility for federal student aid.



→ The schools you selected will receive your FAFSA eligibility information in the first half of March. You will receive an email to let you know when this information has been sent to your selected schools.

→ You will receive an email when your official Student Aid Index (SAI) is available. To review your SAI, log in to StudentAid.gov with your username and password (FSA ID). Your official SAI is a number used to determine federal aid eligibility.

→ Schools will use your official SAI to create your financial aid offer that explains the types and amounts of aid they are offering you. You should begin to receive your personalized aid information from the schools you've been accepted to several weeks after they receive your FAFSA information.



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Start FAFSA Form

Student Provides FTI Consent

Provide Consent and Approval or Be Ineligible for Federal Student Aid ⓘ

Summary

Your consent and approval is needed to retrieve and disclose federal tax information. With your consent and approval, we can obtain tax return information automatically from the IRS to help you complete the FAFSA® form. If you don't provide consent and approval, you will not be eligible for federal student aid, including grants and loans. You must provide consent and approval even if you didn't file a U.S. federal tax return or any tax return at all.

→ Get your 2022 tax return information for the 2024-25 FAFSA form.

→ Federal tax information is used to determine your eligibility for federal student aid.

→ Tax return information is required to complete the FAFSA form.

By accepting below, I consent to the disclosure of information about me, as described below, and further affirmatively approve of the receipt and use of my federal tax information and to the U.S. Department of Education's (ED) redisclosure of my federal tax information, as described below. By accepting below, I consent to and affirmatively approve of, as applicable, the following:

1. ED may disclose my Social Security number (SSN)/ Taxpayer Identification Number (TIN), last name, date of birth, unique identifier, the tax year for which federal tax information is required, and the date and timestamp of my approval for the use of my federal tax information in determining eligibility by ED for which approval is provided to the U.S. Department of the Treasury, Internal Revenue Service (IRS). I understand that in response to such a request from ED, the IRS shall then disclose my federal tax information to "authorized persons" (i.e., specifically designated officers and employees of ED and its contractors (as defined in 26 U.S.C. § 6103(X)(13)(E)) for the purpose of determining eligibility for, and the amount of, federal student aid under a program authorized under subpart 1 of part A, part C, or part D of Title IV of the Higher Education Act of 1965, as amended, for myself or an applicant for federal student

Frequently Asked Questions

Who should provide consent and approval? ⌵

If I'm married and didn't file a joint tax return with my current spouse, does my spouse have to provide consent and approval for you to access their tax information? ⌵

What happens after I provide consent and approval? ⌵

What happens if I decline consent and approval? ⌵

Select "Approve" to consent and approve to using your federal tax information to determine your eligibility for federal student aid. If you select "Decline," you will not be eligible for federal student aid.

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Decline

Approve

Student's Personal Circumstances

Answers based on the date FAFSA is completed

Your Personal Circumstances

We'll ask you questions that help us determine your eligibility for federal student aid. This information can affect the types of federal student aid you're eligible to receive.

→ Sometimes we need to collect information from other people after we review your answers. We'll let you know if this is the case.



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- 1 Personal Circumstances
- 2 Demographics
- 3 Financials
- 4 Colleges
- 5 Signature

Student Current Marital Status ⓘ

Single (never married)

Married (not separated)

Remarried

Separated

Divorced

Widowed

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Student College or Career School Plans

When the student begins the 2024–25 school year, what will their college grade level be? ⓘ

- First year (freshman)
- Second year (sophomore)
- Other undergraduate (junior and beyond)
- Master's, doctorate, or graduate certificate program (such as MA, MBA, MD, JD, PhD, EdD, etc.)

When the student begins the 2024–25 school year, will they already have their first bachelor's degree? ⓘ

- Yes
- No

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Student Personal Circumstances

Select all that apply.

- The student is currently serving on active duty in the U.S. armed forces for purposes other than training. ⓘ
- The student is a veteran of the U.S. armed forces. ⓘ
- The student has children or other people (excluding their spouse) who live with them and receive more than half of their support from the student now and between July 1, 2024, and June 30, 2025. ⓘ
- At any time since the student turned 13, they were an orphan (no living biological or adoptive parent). ⓘ
- At any time since the student turned 13, they were a ward of the court. ⓘ
- At any time since the student turned 13, they were in foster care. ⓘ
- The student is or was a legally emancipated minor, as determined by a court in their state of residence. ⓘ
- The student is or was in a legal guardianship with someone other than their parent or stepparent, as determined by a court in their state of residence. ⓘ
- None of these apply.

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Unusual Circumstances



Student Other Circumstances

At any time on or after July 1, 2023, was the student unaccompanied and either (1) homeless or (2) self-supporting and at risk of being homeless? ⓘ

 Yes No

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Student Unusual Circumstances

This information will help us evaluate the student's ability to pay for school.

Do unusual circumstances prevent the student from contacting their parents or would contacting their parents pose a risk to the student? ⓘ

A student may be experiencing unusual circumstances if they

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

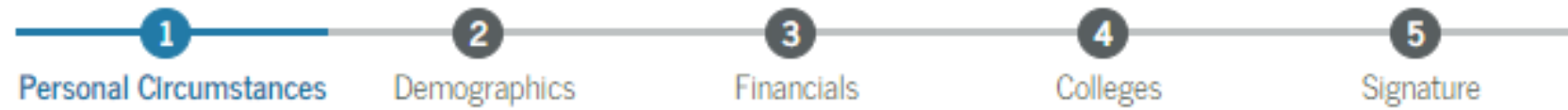
If the student's circumstances resulted in not having a safe and stable place to live, they may be considered a homeless youth and should review the answer to the previous question about being unaccompanied and homeless.

 Yes No

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Special Circumstances



Your Dependency Status



Dependent Student

Based on your answers, you are a dependent student. This means you must provide parent information on your FAFSA® form. This information helps determine how much federal student aid you're eligible to receive.

Direct Unsubsidized Loan Only

Are the student's parents unwilling to provide their information, but the student doesn't have an unusual circumstance that prevents them from contacting or obtaining their parents' information? ⓘ

Select "No" if the student wants a financial aid administrator at their school to determine eligibility for ALL types of financial aid, including grants, loans, and work-study funds. The student's parent(s) will be required to provide their information on the FAFSA form.

Yes

No

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This is the question that is causing the UNSUB Only issue on so many FAFSA's

Dependent students must select NO if they want to be considered for need based aid

Student's Parent Situation

1 Personal Circumstances 2 Demographics 3 Financials 4 Colleges 5 Signature

Tell Us About the Student's Parents

On the FAFSA® form, the "parent" is the student's legal (biological or adoptive) parent.

Are the parents married to each other?

Yes No

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Contributor Invite

Invite Parent(s) to This FAFSA® Form



We Need Information for Your Parent(s) Now



Based on your answers in the previous section, you'll need to provide information about both of your parents on your FAFSA® form. This does not make them financially responsible for your education. Right now, you can invite one or both of your parents to your form and have them complete their required sections.

Enter information about your parents identified on the prior page, and we'll send an email on your behalf.

If they already have a StudentAid.gov account username and password (FSA ID), the information entered here must exactly match that account.

IMPORTANT: If your contributor doesn't have a Social Security number (SSN), you may encounter an issue that impacts your ability to add them to your form. If you receive this error, review [this guidance](#) and recommended workaround and try again.

Only the email address does not need to match the email associated with their StudentAid.gov account. Please use the email address that you know is most likely to reach your contributor.

 Parent	 Parent Spouse or Partner <i>Optional</i>
First Name ⓘ <input type="text"/>	First Name ⓘ <input type="text"/>
Last Name ⓘ <input type="text"/>	Last Name ⓘ <input type="text"/>

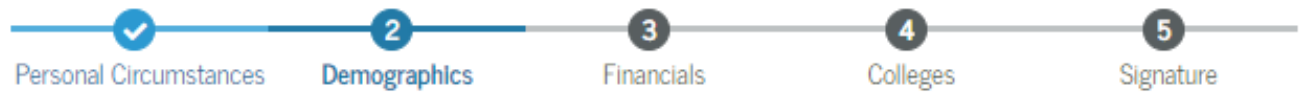
Look Up FSA ID Info

<https://fsapartners.ed.gov/home/>

The screenshot shows the top of the FSA Partner Connect website. The header includes the 'Federal Student Aid' logo and the text 'PROUD SPONSOR of the AMERICAN MIND®'. Below the header is a navigation bar with several menu items: 'KNOWLEDGE CENTER', 'TRAINING', 'FINANCIAL AID DELIVERY', 'TITLE IV PROGRAM ELIGIBILITY', and 'PARTNER CONNECT SERVICES'. The 'PARTNER CONNECT SERVICES' menu is open, showing a list of options: 'Student, Parent, Borrower Accounts' (highlighted with a red box), 'Account Search', 'Date Range Search', 'Record ID Search', 'Partner Profiles', 'School Search', 'School Third-Party Servicer Search', 'Additional Resources', 'Reports', and 'Case Management'. The main content area features a large image of three people in a meeting, with the text 'FSA PARTNER CONNECT' overlaid. Below the image is a 'Log In' button and a paragraph of text starting with 'If you are a student or a parent, please...'. At the bottom of the page, there is a footer that reads 'Partner Connect is the new home of the E-App'.

Thank you,
Rebecca
from UIW!

Student Demographic Information



Student Demographic Information

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

Your answers will not

- affect the student's eligibility for federal student aid,
- be used in any calculations, or
- be shared with the schools to which the student applies.

What is the student's gender? ⓘ

Male

Female

Nonbinary

Prefer not to answer

Previous

Continue



Student Race and Ethnicity ⓘ

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

Your answers will not

- affect the student's eligibility for federal student aid,
- be used in any calculations, or
- be shared with the schools to which the student applies.

Is the student of Hispanic, Latino, or Spanish origin? ⓘ

Select all that apply.

No, not of Hispanic, Latino, or Spanish origin

Yes, Mexican, Mexican American, or Chicano

Yes, Puerto Rican

Yes, Cuban

Yes, another Hispanic, Latino, or Spanish origin

Prefer not to answer

What is the student's race? ⓘ

Select all that apply.

White

Black or African American

Asian

American Indian or Alaska Native

Native Hawaiian or Other Pacific Islander

Prefer not to answer

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Continue



Student Citizenship Status ⓘ

U.S. citizen or national

Eligible noncitizen

Neither U.S. citizen nor eligible noncitizen

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Parent Education Status

Did either of the student's parents attend college or complete college? ⓘ

Neither parent attended college

One or both parents attended college, but neither parent completed college

One or both parents completed college

Don't know

Previous



Parent Killed in Line of Duty

Was the student's parent or guardian killed in the line of duty while either (1) serving on active duty as a member of the U.S. armed forces on or after the events of 9/11, or (2) performing official duties as a public safety officer? ⓘ

Public safety officers include law enforcement officers, firefighters, and emergency service workers.

Yes

No

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Continue

School Selection

Progress: 1 Personal Circumstances (checked), 2 Demographics, 3 Financials, 4 Colleges, 5 Signature

Student High School Completion Status

What will the student's high school completion status be at the beginning of the 2024–25 school year? ⓘ

- High school diploma
- State-recognized high school equivalent (e.g., GED certificate)
- Homeschooled
- None of the above

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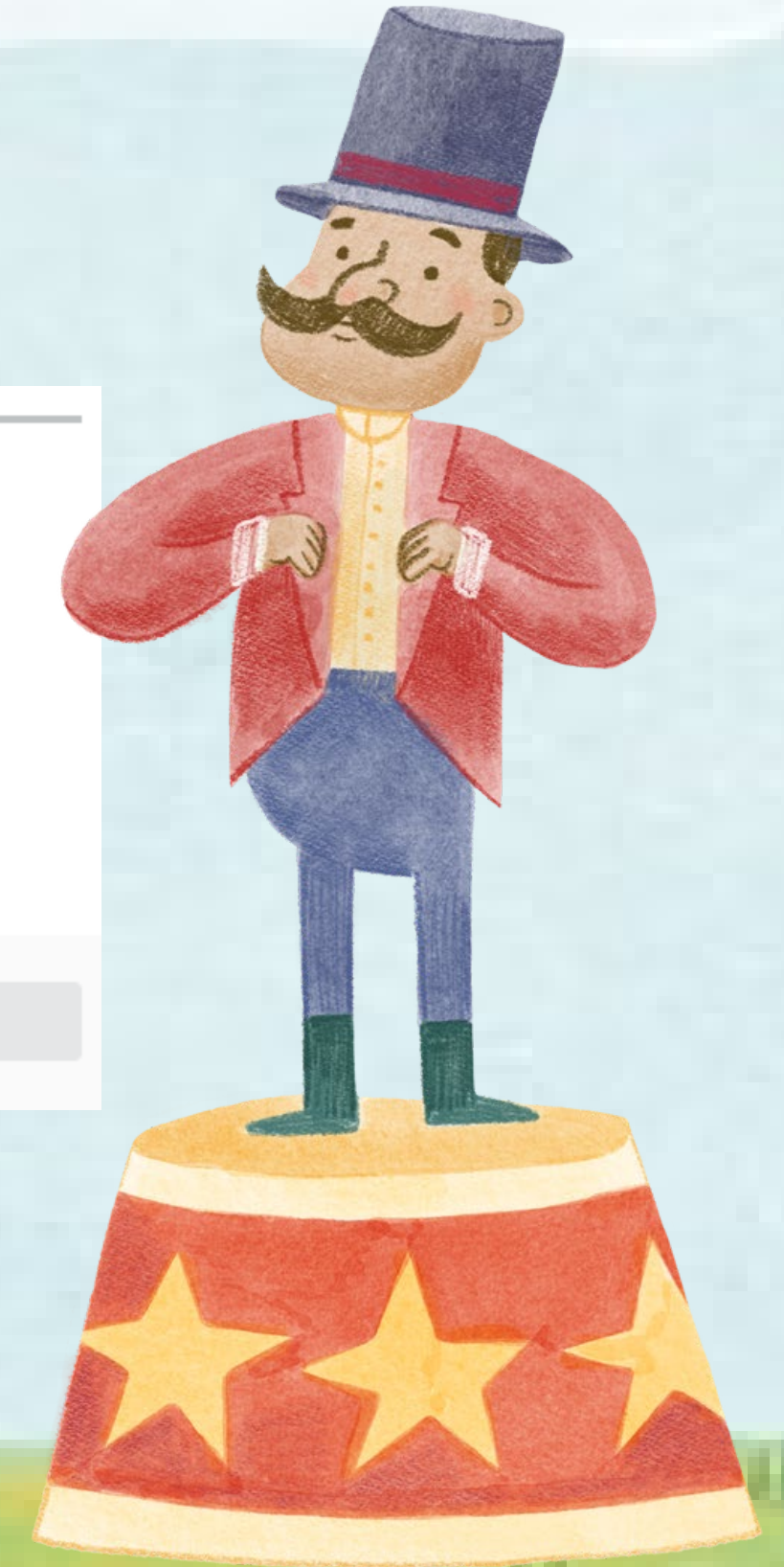
Progress: 1 Personal Circumstances (checked), 2 Demographics, 3 Financials, 4 Colleges, 5 Signature

Student High School Information

From what high school did or will the student graduate? ⓘ

State

[Previous](#) [Continue](#)



Student Financial Info

FAFSA[®] FORM 2024-25

Your Finances

The FAFSA[®] form helps determine your ability to pay for school. In this section, we ask about your financial information.



What if you have special financial circumstances?

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Student 2022 Tax Return Information

Refer to the student's 2022 tax return to answer the following questions.
If the answer is zero or the question does not apply, enter 0.

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

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

\$.00 ⓘ

Foreign Earned Income Exclusion

\$.00 ⓘ

Previous

Continue



Student Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student financial aid.

\$.00 ⓘ

Current Net Worth of Investments, Including Real Estate

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

\$.00 ⓘ

Current Net Worth of Businesses and Investment Farms

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

\$.00 ⓘ

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Continue

College Selections

Select Colleges

Search for and select colleges and career schools you're considering so they automatically receive an electronic copy of the FAFSA® form.



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Continue




Where should we send the FAFSA® information?

Search and select colleges and career schools.


If you can't find your school when searching by School Name or State, try searching by School Code.

You can add up to 20 colleges and career schools to the FAFSA® form. Make sure to list all the schools you're considering, even if you're not certain you'll apply to all of them.

 0 out of 20 schools selected [View Selected Schools](#)

[Search by School Name](#) [Search by School Code](#)

State

 Search

Previous

Continue

Student Review

Select "Continue" To Sign Your Form

After reviewing your answers, scroll to the bottom of the page to continue. You must continue past this page to sign your section of this FAFSA form.



Student Sections

Collapse All ^

- Introduction
- Personal Identifiers**



Sign and Complete Your Section ⓘ

Summary

This page confirms that you understand the terms and conditions of the FAFSA® form and filled out the form accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

By signing this application electronically using your FSA ID, YOU, THE STUDENT, certify that you

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

Full Summary

Sign and Submit

By signing this application electronically using your account username and password, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide

- information that will verify the accuracy of your completed form, and
- U.S. or foreign income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application.

If you sign this application or any document related to the federal student aid programs electronically using a username and password, and/or any other credential, you certify that you are the person identified by the username and password, and/or any other credential and have not disclosed that username and password, and/or any other credential to anyone else. If you purposefully give false or misleading information, including applying as an independent student without meeting the unusual circumstances required to qualify for such a status, you may be subject to criminal penalties under 20 U.S.C. 1097, which may include a fine up to \$20,000, imprisonment, or both.

Sign Your FAFSA Form

I, [REDACTED], agree to the terms outlined above.

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Sign

You're Almost There!
The student section is complete!

Parent Contributors

Requirements for Dependent Students
Your FAFSA® form is not complete until your parent(s) fill in the contributor section of the form and sign it. Once completed, your FAFSA form will be submitted for processing.

Contributor(s)	Role	Date Added	Status
[REDACTED]	Parent	3/29/2024	Invite Sent

Contributor Status

Parent Invited by Student

My Activity

██████████ Wants Your Help on a FAFSA® Form

██████████ has identified you as a parent on their *Free Application for Federal Student Aid* (FAFSA®) form.

Parents are required to provide their financial and demographic information on the student's FAFSA form. This does not make you financially responsible for Michael's educational costs or any federal student loans they decide to accept.

Visit the [2024–25 FAFSA Help Center](#)

Accept Invitation

Decline Invitation



By accepting this invitation, you agree to share your personal and contact information from your StudentAid.gov account on the student's FAFSA form. Once you accept, your information will be linked to this form.

By Accepting This Invitation You Agree to Share Your Information

We will need to use some personal information we already have on file about you in order to fill out the necessary steps in this FAFSA® form. To accept this invitation, select "Continue."

Go Back

Continue

Parent Provides FTI Consent



Consent and approval will be applied to all FAFSA Applications

By providing consent and approval, you approve the use and disclosure of 2022 federal tax information to the U.S. Department of Education for the purpose of completing this and all other 2024–25 FAFSA® forms.

Provide Consent and Approval or the Student Will Be Ineligible for Federal Student Aid ⓘ

Summary

Your consent and approval is needed to retrieve and disclose federal tax information. With your consent and approval, we can obtain tax return information automatically from the IRS to help you complete your section of the student's FAFSA® form. If you don't provide consent and approval, the student will not be eligible for federal student aid, including grants and loans. You must provide consent and approval even if you didn't file a U.S. federal tax return or any tax return at all.

- Get your 2022 tax return information for the 2024–25 FAFSA form.
- FTI is used to determine the student's eligibility for federal student aid.
- Tax return information is required to complete the FAFSA form.

By accepting below, I consent to the disclosure of information about me, as described below, and further affirmatively approve of the receipt and use of my federal tax information (FTI) and to the U.S. Department of Education's (ED) redisclosure of my federal tax information, as described below.

By accepting below, I consent to and affirmatively approve of, as applicable, the following:

1. ED may disclose my Social Security number (SSN)/ Taxpayer Identification Number (TIN)/, last name, date of birth, unique identifier, the tax year for which federal tax information is

under false pretenses is a criminal offense under the *Privacy Act of 1974*, subject to a fine of not more than \$5,000 fine (5 U.S.C. § 552(a)(i)(3)). By accepting and submitting my part of the FAFSA, my execution (including date and time) of consent and approval will be logged in ED's Person Authentication Service (PAS) System of Record (18-11-12).

Frequently Asked Questions

Who should provide consent and approval? ⌵

If I'm married and didn't file a joint tax return with my current spouse, does my spouse have to provide consent and approval for you to access their tax information? ⌵

What happens after I provide consent and approval? ⌵

What happens if I decline consent and approval? ⌵

Select "Approve" to consent and approve to using your federal tax information to determine the student's eligibility for federal student aid. If you select "Decline," the student will not be eligible for federal student aid.

Previous

Decline

Approve

Parent Demographic Information

Parent Demographics

We'll ask questions about you and your family. These questions will help determine how much federal student aid the student is eligible to receive for school.



Previous



1 Demographics 2 Financials 3 Signature

Parent Current Marital Status ⁱ

Single (never married)

Unmarried and both legal parents living together

Married (not separated)

Remarried

Separated

Divorced

Widowed

Previous Continue

1 Demographics 2 Financials 3 Signature

Parent State of Legal Residence

State ⁱ

Texas (TX)

Date the Parent Became a Legal Resident of Texas (TX)

Month Year ⁱ

Previous Continue

Parent Financial Info

Parent Finances

The FAFSA® form helps determine the student's eligibility for federal student aid. In this section, we ask about your financial information.

What if you have special financial circumstances?

Previous



Texas Ass

1 Demographics

2 Financials

3 Signature

Federal Benefits Received

Questions Don't Affect Federal Student Aid Eligibility

Your answers to these questions will not affect the student's eligibility for federal student aid or these federal benefits.

At any time during 2022 or 2023, did the parent or anyone in their family receive benefits from any of the following federal programs? ⓘ

Select all that apply.

- Earned Income Credit (EIC) ⓘ
- Federal Housing Assistance ⓘ
- Free or Reduced Price School Lunch ⓘ
- Medicaid ⓘ
- Refundable Credit for Coverage Under a Qualified Health Plan (QHP) ⓘ
- Supplemental Nutrition Assistance Program (SNAP) ⓘ

- Supplemental Security Income (SSI) ⓘ
- Temporary Assistance for Needy Families (TANF) ⓘ
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) ⓘ
- None of these apply.

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Continue



✓ Demographics 2 Financials 3 Signature

Parent Tax Filing Status

Did or will the parent file a 2022 joint tax return with their current spouse? ⓘ

Yes No

✓ Demographics 2 Financials 3 Signature

Family Size

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

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

Yes No

✓ Demographics 2 Financials 3 Signature

Number in College

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

Do not include parent(s).

ⓘ



Parent 2022 Tax Return Information

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

If the answer is zero or the question does not apply, enter 0.

i Report Combined Taxes

Please report the combined tax information for the parent and their spouse.

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

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

\$.00 ⓘ

Foreign Earned Income Exclusion

\$.00 ⓘ

Previous

Continue

i Report Combined Assets and Child Support Received

Report the combined assets and child support received for both parents.

Annual Child Support Received

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

\$.00 ⓘ

Parent Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student financial aid.

\$.00 ⓘ

Current Net Worth of Investments, Including Real Estate

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

\$.00 ⓘ

Current Net Worth of Businesses and Investment Farms

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

\$.00 ⓘ

Previous

Continue

Parents who File Jointly

The parent who is signing the FAFSA will have to enter the SSN, DOB and email for the other parent.

Progress: 1 Demographics (checked), 2 Financials (active), 3 Signature


Parent Spouse's or Partner's Information

Enter the following information about your spouse and we'll send an email on your behalf.

If they already have a StudentAid.gov account username and password (FSA ID), the information entered here must exactly match that account. Only the email address does not need to match.

We highly recommend you provide the necessary information on this page and select either "Continue" or "Save" before exiting the form.

IMPORTANT: If your contributor doesn't have a Social Security number (SSN), you may encounter an issue that impacts your ability to add them to your form. If you receive this error, review [this guidance](#) and recommended workaround and try again.

 Parent Spouse or Partner

First Name ⓘ

Full Summary

Select "Continue" To Sign Your Form

After reviewing your answers, scroll to the bottom of the page to continue. You must continue past this page to sign your section of this FAFSA form.



Parent Sections

Collapse All ^

- Introduction
- Personal Identifiers



Parent Sign and Submit

✓
Demographics

✓
Financials

3
Signature

Sign and Submit the FAFSA Form ⓘ

Summary

This page confirms that you understand the terms and conditions of the FAFSA® form and filled out the form accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

By signing the student's application electronically using your account username and password, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide

- information that will verify the accuracy of your completed form, and
- U.S. or foreign income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application.

If you sign this application or any document related to the federal student aid programs electronically using a username and password, and/or any other credential, you certify that you are the person identified by the username and password, and/or any other credential and have not disclosed that username and password, and/or any other credential to anyone else. If you purposefully give false or misleading information, including applying as an independent student without meeting the unusual circumstances required to qualify for such a status, you may be subject to criminal penalties under 20 U.S.C. 1097, which may include a fine up to \$20,000, imprisonment, or both.

Sign for yourself and submit the application for [REDACTED] (Student).

I, [REDACTED] agree to the terms outlined above.

Previous

Sign and Submit



Troubleshooting

Missing Signatures

Invite Sent – No FAFSA form started for contributor to add info

Completing Student and Parent Portions concurrently on different computers

FAFSA Disclosures

Agree to use aid only for educational purposes

Certify the information is correct

Give ED authority to verify information with other agencies

Agree to provide the school with requested documents

Certify student's identity

Acknowledge consequences of false information

Certify not in loan default

Agree to only receive Pell from one institution per enrollment period

Certify student does not owe for a grant overpayment

Successfully Submitted

- **Student receives email their FAFSA is submitted**
- **Student receives 2nd email confirmation that FAFSA was processed – including their **FAFSA Submission Summary (FSS)****
 - **Usually takes 3-5 business days**
 - **Provides Estimated Eligibility Information**
 - **Grants**
 - **Loans**
 - **Work Study**
 - **Notifies student to contact school with questions**
- **Schools listed on the students FAFSA can access the students Institutional Student Information Record (ISIR) through the FAFSA Processing System (FPS)**

Common FAFSA Mistakes

Missing Signatures

Wrong SSN

Wrong Name

Wrong DOB





The FAFSA Processing

Student Submits FAFSA

Federal Processing System (FPS) sends information to federal databases to be reviewed (Database Matches)

Federal databases send match data back to FPS

FPS adds database match results and reject codes to ISIR

FPS sends ISIR to School

Eligibility Criteria Checks

**Checks
throughout
the
application
process**

- **Checked through the application process**
- **Checked/monitored by the school**
- **Not specifically checked but reviewed if conflicting information exists**
- **Database Matches**
- **FAFSA Submission Summary (FSS)**
- **Institutional Student Information Record (ISIR)**
- **FAFSA Rejects**
- **C-codes or C-flag**

Database Matches

Social Security Administration

- **Citizenship**
- **SSN**
- **Deceased Persons**
- **Both Student and Contributors**

Department of Homeland Security

- **Eligible Non-Citizen Status**
- **Alien Registration Number Sent for Match**
- **Primary and Secondary Confirmation Process**

Department of Veteran Affairs

- **Veteran Status**



Database Matches

National Student Loan Data System (NSLDS)

- **Verifies Default/Overpayment Status**
- **Reports Unpaid Title IV Fraud**
- **Ensures Annual and Aggregate Limits are not Exceeded**
- **Informs School if Student Subsequently Becomes Ineligible based on New Data in NSLDS**
- **Identifies Unusual Enrollment History**

Special Rule for Pell Grants

**Formerly the Iraq and Afghanistan Service Grant (IASG)
and Children of Fallen Heroes (CFH)**

Beginning with 2024-25, there is no longer a Department of Defense Database check. The DoD is no longer able to provide confirmation that a service member killed in the line of duty meets the revised special eligibility criteria. Students will self-report their parent died in the line of duty and schools will have to certify eligibility



FPS Review and Processing

- **Adds data match results to the FAFSA**
- **Reviews FAFSA data for completion and errors**
- **Adds reject codes and c-codes which identify problems**
- **Sends the ISIR to the School**
- **Usually occurs within 3-5 business days of FAFSA submission**

Resolving Rejects

Reject reason will be present in FAA information section

Follow instructions for resolution

No SAI will be calculated on rejected ISIRS

Resolving Rejects



- **Your Institution's Financial Aid Management System (FAMS) likely provides ways to view reject codes and potentially resolve some rejects**
- **Review student in FAFSA Partner Portal (Not currently working)**
- **Usually involves correction- documentation required from the student**

Resolving Rejects

ISIR Comment Codes and Text

Released each Award Year

Review resolution required for codes in FAFSA Partner Portal or [Volume 7 of the FAFSA Specifications Guide](#)

Not all comment codes are bad



2024–25 Comment Text (Continued)

Comment Code	Comment Text	Notes	Reason for Comment	FPS C Flag	Reject Code	Action Needed
066	The amount of taxes that your parent reported is very high compared to their adjusted gross income. Your parent must log in to StudentAid.gov, select your FAFSA form from their Dashboard, and select "Make a Correction" if they need to update their information.	Updated reason for comment and action needed	Dependent student and parents' Income Tax Paid is greater than zero and equal to or greater than Adjusted Gross Income	No	35	Resolution Required. Review and correct or confirm the parents' income tax paid or AGI.

Resolving Flags

**Record is flagged with “C”
SAI Calculated, but cannot be used**

Student is ineligible until resolved

**School Collects documentation and
submits corrections**



346	There is a limit to the total amount of Federal Pell Grants that a student may receive, which is the equivalent of 6 school years. Based on information reported to the National Student Loan Data System (NSLDS) by the schools you have attended, you have received a total amount of Pell Grants that is close to the cumulative total you can receive. Therefore, your eligibility for additional Pell Grants may be limited.	There is a limit to the total amount of Federal Pell Grants that a student may receive (6 school years). You have received a total amount of Pell Grants that is close to the cumulative total you can receive. Therefore, your eligibility for additional Pell Grants may be limited.		Applicant's Pell Lifetime Eligibility Used amount is close to the Pell limit	Y		Resolution required. Check NSLDS records to verify that the applicant is not exceeding lifetime eligibility.
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Common Resolutions

Mismatches between SSN and DOB

- **Resolved with Social Security Card or student contacts Social Security Administration**

Invalid Citizenship Status Matches

- **Resolved with documentation (Certificate of Naturalization/Passport)**



**Eligibility
regained for
SSN and
Citizenship
Issue for
entire aid
year**

Criteria Checked and Monitored by School

Regular Student

- **HS Diploma or Equivalent**

Satisfactory Academic Progress (SAP)

Financial Need

- **Pell Grant**
- **Direct Subsidized Loan**

Individual Title IV Program Eligibility Requirements

- **ie., TEACH Grant**



Criteria Not Specifically Checked



- **Simultaneous enrollment in elementary or secondary school**
- **Property liens/debt owed to the US**
- **Incarceration**
- **Suspected Fraud**
- **Conflicting information must ALWAYS be resolved**


Other Eligibility Factors

- **Prior Degrees**
- **Correspondence Courses, Distance Education, Remedial Coursework**
- **Enrollment Status**
- **Program of Study**

The Proverbial



How does your institution send award notifications?



Before the
Curtain Closes:
Questions?

Resources

- **Paper [FAFSA](#)**
- **[FAFSA Partner Portal](#)**
- **[FAFSA on the Web Demo](#)**
- **[SAR Comment Codes and Text](#)**
- **NASFAA**
 - **Today's News**
 - **AskRegs**
 - **Webinars**
 - **Self-Study Guides**
- **[FSA Knowledge Center](#)**
 - **FSA Handbook**
 - **Application and Verification Guide**
 - **Student Eligibility, Volume 1**
 - **This site is your best friend!**
- **TASFAA/SWASFAA Training Opportunities**
- **[Dear Colleague Letters](#)**
- **[Electronic Announcements](#)**

Thank You for
Completing our
Survey



FAFSA/Student Eligibility