

# Completing the FAFSA: 2018–19

August 16, 2017



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August 2017



# NASFAA Webinar

## Completing the FAFSA: 2018–19

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### Table of Contents

Slides .....	1
FAFSA .....	23
Summary of Enhancements - Paper.....	33
Summary of Enhancements - Web.....	37
Resources.....	41
Who Is My “Parent” When I Fill Out the FAFSA <sup>SM</sup> .....	43
Glossary for The Application Process.....	45

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# NASFAA's Webinar Series Completing the FAFSA: 2018–19 Presented August 16, 2017

National Association of Student  
Financial Aid Administrators

NASFAA's Webinar Series  
**Completing the FAFSA:  
2018–19**  
August 16, 2017



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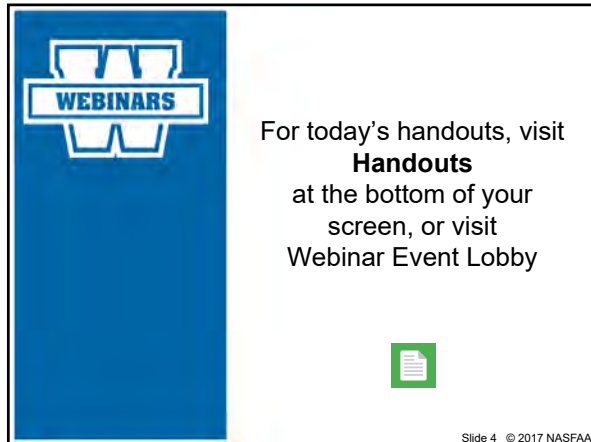
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For today's handouts, visit **Handouts** at the bottom of your screen, or visit Webinar Event Lobby



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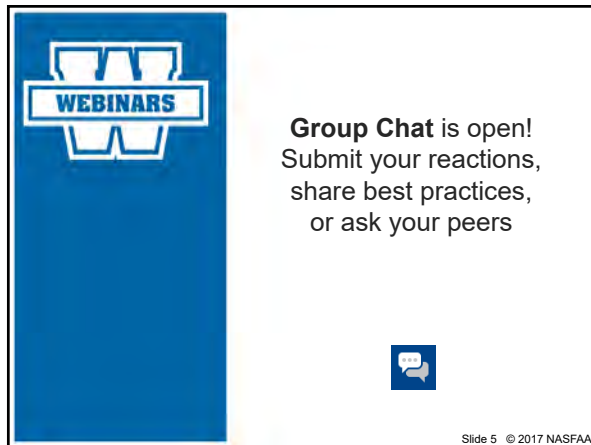
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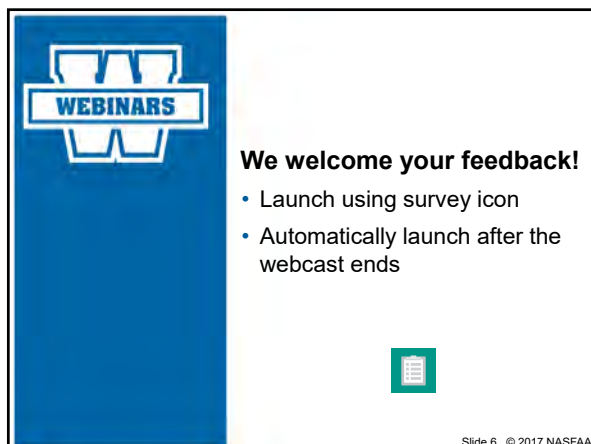
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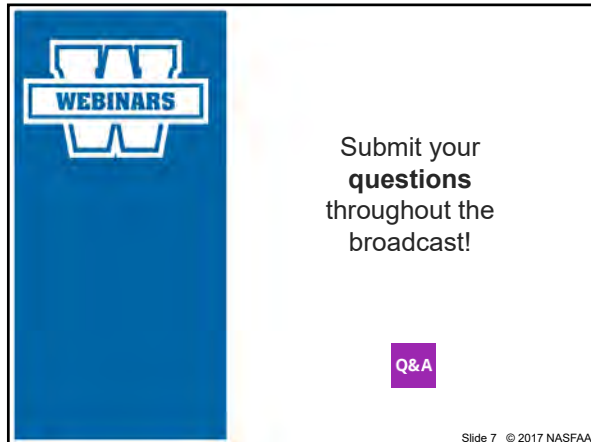
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Submit your **questions** throughout the broadcast!

**Q&A**

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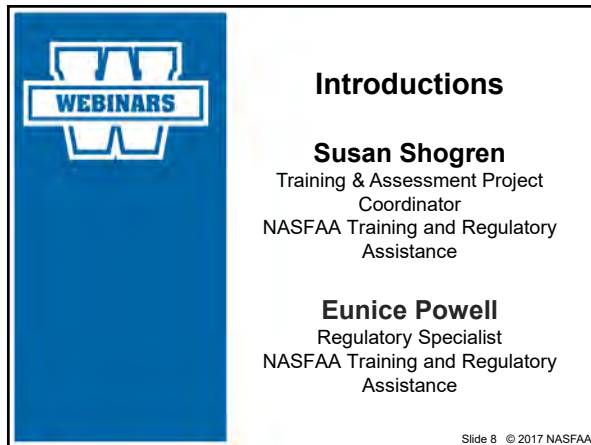
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**Introductions**

**Susan Shogren**  
Training & Assessment Project  
Coordinator  
NASFAA Training and Regulatory  
Assistance

**Eunice Powell**  
Regulatory Specialist  
NASFAA Training and Regulatory  
Assistance

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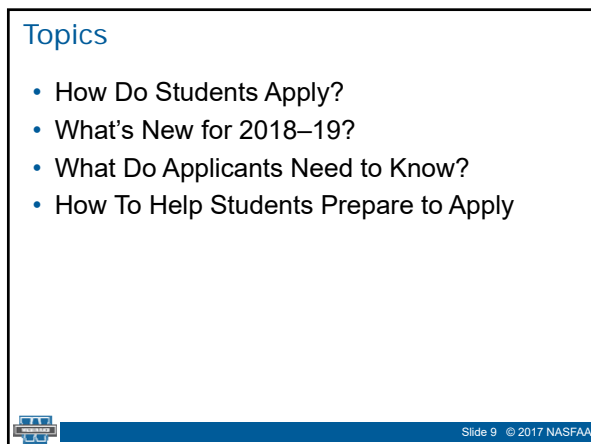
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**Topics**

- How Do Students Apply?
- What's New for 2018–19?
- What Do Applicants Need to Know?
- How To Help Students Prepare to Apply

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# NASFAA's Webinar Series

## Completing the FAFSA: 2018–19

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### Poll

How will you use what you learn today? [check all that apply]

- Help students and parents complete the FAFSA
- Review FAFSA application data
- Verify FAFSA application data for accuracy
- Prepare for application processing
- Update our policies and procedures
- Train others about the 2018–19 application cycle
- Other



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### Poll Results

How will you use what you learn today? [check all that apply]

- Help students and parents complete the FAFSA
- Review FAFSA application data
- Verify FAFSA application data for accuracy
- Prepare for application processing
- Update our policies and procedures
- Train others about the 2018–19 application cycle
- Other



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### How Do Students Apply?



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# NASFAA's Webinar Series

## Completing the FAFSA: 2018–19

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### Filing Methods

- Paper FAFSA
- FAFSA on the Web (FOTW)
- FAA Access to CPS Online
- FAFSA on the Phone

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### FAFSA on the Web (FOTW)

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### PREPARING FOR THE FAFSA

The FAFSA process is quicker and easier when you have a username and password called an FSA ID. (If your parent is providing information on your FAFSA, he or she will need his or her own FSA ID as well.) Learn more about the FSA ID and how to create yours at StudentAid.gov/fsaid.

**GATHER THIS INFORMATION**  
The FAFSA asks questions about you and your finances, so have the information below handy.

- Social Security number
- Alias registration number
- Federal tax information or tax returns
- Records of untaxed income
- Cash, savings, and checking account balances
- Investments other than the home in which you live

**DON'T HAVE ALL YOUR INFO READY YET?**  
That's okay! You can start the FAFSA, save it, and come back later to finish it. To find out whether you need to report only about your parents, visit StudentAid.gov/dependency.

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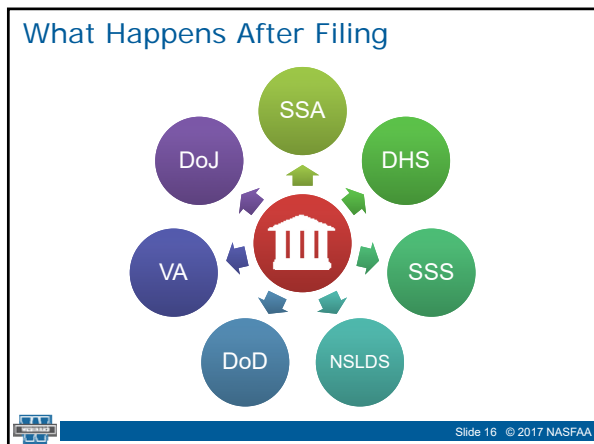
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## Completing the FAFSA: 2018–19

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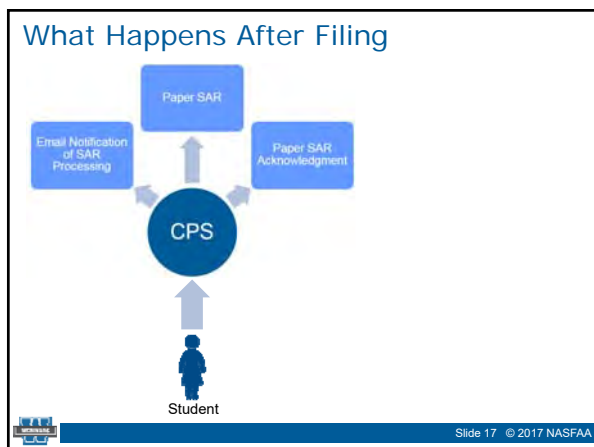
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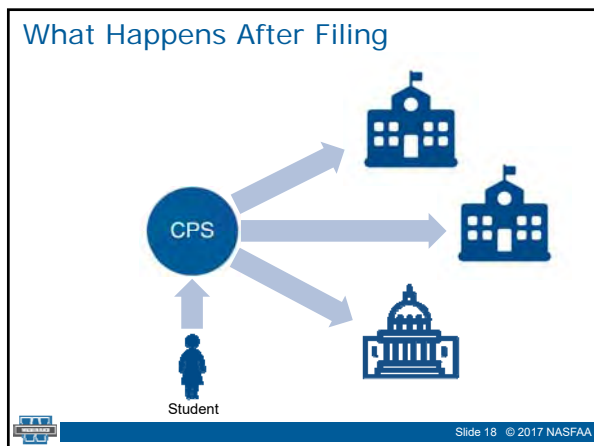
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## Completing the FAFSA: 2018–19

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### What Happens After Filing



- Changes to **incorrect** data must be made by the student, parent, or financial aid administrator, when errors are discovered

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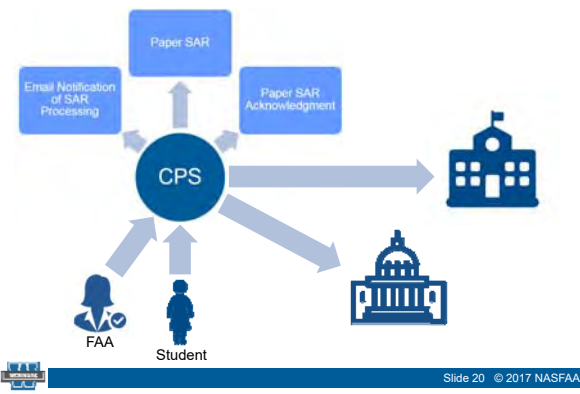
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### Corrections



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### Poll

How many FAFSAs does the U.S. Department of Education estimate will be submitted for the 2018–19 award year?

- 10.9 million
- 16.2 million
- 22.7 million

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## Completing the FAFSA: 2018–19

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### Poll Results

How many FAFSAs does the U.S. Department of Education estimate will be submitted for the 2018–19 award year?

- 10.9 million
- 16.2 million
- 22.7 million



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### What's New for 2018–19?



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### FSA ID

- Removed references to "FSA PIN"
- Increased security
- Added a disclaimer required by OIG and DoJ
- Improved self-help with account recovery
- Modified challenge questions
- Restricted Social Security Number updates



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## Completing the FAFSA: 2018–19

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**FSA ID**

Log in to StudentID.gov   Create an FSA ID   Manage My FSA ID

Please enter your:

Email:

Confirm Email:

Username:

Password:

Confirm Password:

<https://fsaid.ed.gov>

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**FSA ID**

Challenge Questions And Answers

Challenge questions and answers are used to retrieve your username or password if you forget them and to protect your account. Please provide the four required challenge questions and answers below and select CONTINUE.

Challenge Question 1:

Answer 1:

Challenge Question 2:

Answer 2:

Challenge Question 3:

Answer 3:

Challenge Question 4:

Answer 4:

Optional Question 1:

Would you like to provide an ID digit built by one or more of our best practices more than once?  
 Yes  No

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**Changes to URLs**

- URLs updated to remove “www” per OMB Memorandum M-15-13
- Secure internet connections only
- Example:

**fafsa.gov** This is the fastest and easiest way to apply for aid.

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## Completing the FAFSA: 2018–19

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### Modifications to Instructions

- Added “tuition expenses” back into list of unusual circumstances
- Replaced “tuition payment plans” with “tuition assistance plans”
- Notes for questions 56-58 modified:
  - Removed “youth” definition bullet
  - Deleted reference to “under 24 years of age”



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### Selective Service Registration

- Question 21 asks “Were you born male or female?”
- Question 22 text clarifies who must register



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### Parents

- Moved “legal” from question 59 into option
- Added “legal” to notes
- Defined as “biological, adoptive, or as determined by the state”



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## Exemption Amount

- Updated exemption amount to \$4,050 from \$4,000

### Notes for questions 38 (page 4) and 87 (page 7) — Notes for those who filed a 1040EZ

On the 1040EZ, if a person didn't check either box on line 5, enter 01 if he or she is single or has never been married, or 02 if he or she is married. If a person checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$4,050 equals one exemption).



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## Taxable Grants and Scholarships

- Added "**reported to the IRS**" in adjusted gross income to questions:
  - 44d (student)
  - 93d (parent)



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## List of Schools

- Clarified instructions about delivery of FAFSA data
  - Each school listed, without list
  - Student's state agency, with list
  - Check with state agency to find out whether order may affect eligibility for state aid
- Added "Consult your state agency or **StudentAid.gov/order** for details."
- Revised FOTW help text to list more than 10 schools



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## Completing the FAFSA: 2018–19

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### Access to the IRS DRT

- Available October 1, 2017 (2018–19 FAFSA)
- Voluntarily transfer 2016 tax data
- Transferred information masked
  - “Transferred from the IRS” on FOTW and SAR
  - Schools and state agencies can view data
- Removed “view” from instructions
- Corrections
  - Contact financial aid office to evaluate and submit any changes



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### Access to the IRS DRT

- New screening question for rollovers
  - If yes, rollover amount is entered in new field
- Joint return filers must manually enter income earned from work
- New IRS Data Field Flag “1”
  - Each data item that transferred without changes



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### Access to the IRS DRT

- IRS Request Flag “06”
  - Tax information transferred after initial FAFSA
  - School must contact the student or parent to review
- IRS Request Flag “07”
  - Amended tax return on file with IRS
  - School must contact the student or parent to review
- New Comment Codes 400 and 401
  - School must review and may contact student



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## Completing the FAFSA: 2018–19

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What Do Applicants  
Need to Know?

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"Timing is Everything"



Ivy Tech Community College

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**Frequent FAFSA Errors**

- Social Security Numbers
- Divorced/widowed/remarried parental information
- Income earned by parents/stepparents
- Untaxed income
- U.S. income taxes paid
- Household size
- Number of household members in college
- Real estate and investment net worth

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## Dependency Status

- Your answers in Step Three determine whether your parents' information is required
- You may be asked to document your status
- You may need to provide your parents' information even if you do not live with or receive support from them
- If this is a barrier, contact the financial aid office



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## "I'M GROWN – DEBUNKING DEPENDENCY STATUS MYTHS"



Houston Community College



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## Family Size and Structure

- Your "FAFSA household" is affected by:
  - Dependency status
  - Marital status of student (or parent)
  - Family members and additional persons
- You may be asked to document your answers
- FAFSA household size may differ from:
  - Exemptions claimed on income tax returns
  - Actual household



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## Completing the FAFSA: 2018–19

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### Reporting Assets

- Current assets as of the date FAFSA is filed
- Do not include:
  - Student financial aid
  - Family home
  - Family farm
  - Family business with 100 or fewer employees
  - Value of life insurance or retirement plans



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### Special Circumstances

- Change in income
- Change in employment status
- Unusual medical expenses not covered by insurance
- Change in parent marital status
- Unusual dependent care expenses
- Student cannot obtain parental information



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### How to Help Students Prepare to Apply



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"Best FAFSA Advice Ever"



Texas Tech University

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How Do You... ..answer questions about how to complete the FAFSA?



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"FAFSA Friday at EMU"



Eastern Michigan University

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## Completing the FAFSA: 2018–19

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How Do You... ..help students around barriers and road blocks?



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Poll

What is the average time it takes for students to complete the FAFSA?

- 60-90 minutes
- 45-59 minutes
- 30-44 minutes
- Less than 30 minutes

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Poll Results

What is the average time it takes for students to complete the FAFSA?

- 60-90 minutes
- 45-59 minutes
- 30-44 minutes
- Less than 30 minutes

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## Completing the FAFSA: 2018–19

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How Do You... ..help students with the FAFSA application process?



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### Helpful Resources

- Video tutorials on [FSA's YouTube channel](#):
  - [How to Create Your FSA ID](#)
  - [What To Do If I Forgot My FSA ID Username](#)
  - [What To Do If I Forgot My FSA ID Password](#)
- UCSB's video: [7 Easy Steps to the FAFSA](#)
- FAFSA Demo
  - Available on September 24, 2017
  - [fafsademo.test.ed.gov](http://fafsademo.test.ed.gov)
    - User Name: eddemo
    - Password: fafsatest

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Submit your **questions!**



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How to Find Answers to  
Your Regulatory Questions  
September 12, 2017  
2:00 pm ET

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NASFAA's 2017–18  
Webinar Series

Federal Work-Study and  
Community Service  
September 20, 2017  
2:00 pm ET

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## Completing the FAFSA: 2018–19

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**2017–18 Course Schedule**

- Overview of the Financial Aid Programs – 7/10/17
- Direct Loans (8 weeks) – 9/11/17
- Verification – 10/17/17
- Overview of the Financial Aid Programs – 11/27/17
- Verification – 1/16/18
- Return of Title IV Funds – 1/30/18
- Cash Management – 2/21/18
- Administrative Capability – 3/6/18
- Need Analysis & Professional Judgment (8 weeks) – 4/2/18



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NASFAA's Student Aid Index compiles important financial aid resources into one convenient tool so you have the information you need, when you need it.

[NASFAA.ORG/INDEX](http://NASFAA.ORG/INDEX)

- ✦ **Save time.** Direct access to regulations, legislation, and other key resources—no more conducting Google searches to find answers.
- ✦ **Look good.** Quickly locate the citations you need to support your decisions and recommendations—and demonstrate your expertise in front of parents, students, and your supervisor.
- ✦ **Increase your productivity.** Use this simple, intuitive tool to get more done by spending less time searching for the information you need.
- ✦ **Included with membership.** If you are a NASFAA member, you can enjoy the Student Aid Index gratis, and let us know how you like it.

AVAILABLE FOR NASFAA MEMBERS ONLY




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**Thank you for joining us!**



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Use this form to apply free for federal grants, work-study, and loans.

URLs no longer include "www."

Or apply free online at **fafsa.gov**.

Check with your financial aid administrator for these states and territories:  
AL, AS \*, AZ, CO, FM \*, GA, GU \*, HI \*, MH \*, MT \*, NE, NH \*, NM, PR, PW \*, RI \*, SD \*, UT, VA \*, VI \*, WI and WY \*.

Pay attention to any symbols listed after your state deadline.

### Applying by the Deadlines

For federal aid, submit your application as early as possible, but no earlier than October 1, 2017. We must receive your application no later than June 30, 2019. Your college must have your correct, complete information by your last day of enrollment in the 2018-2019 school year.

For state or college aid, the deadline may be as early as October 2017. See the table to the right for state deadlines. You may also need to complete additional forms.

Check with your high school guidance counselor or a financial aid administrator at your college about state and college sources of student aid and deadlines.

If you are filing close to one of these deadlines, we recommend you file online at **fafsa.gov**. This is the fastest and easiest way to apply for aid.

### Filing deadlines updated and state deadlines estimated.

### Using Your Tax Return

We recommend that you complete and submit your FAFSA as soon as possible on or after October 1, 2017. The easiest way to complete or correct your FAFSA with accurate tax information is by using the IRS Data Retrieval Tool through **fafsa.gov**. In a few simple steps, most students and parents who filed a 2016 tax return can transfer their tax return information directly into their FAFSA.

If you (or your parents) have missed the 2016 tax return deadline (IRS), you should submit your FAFSA now using estimated tax information, and then you **must correct** that information **after you file** your return.

**Note:** Both parents or both the student and spouse may need to report income information on the FAFSA if they did not file a joint tax return for 2016. For assistance with answering the income information questions in this situation, call 1-800-4-FED-AID (1-800-433-3243).

### Filling Out the FAFSA<sup>®</sup>

If you or your family experienced significant changes to your financial situation (such as loss of employment), or other unusual circumstances (such as high unreimbursed medical or dental expenses), complete this form to the extent you can and submit it as instructed. Consult with the financial aid office(s) you applied to or plan to attend.

For help in filling out the FAFSA, go to **studentaid.gov**, complete **fafsa** or call 1-800-433-3243. TTY users (for the hearing impaired) may call 1-800-730-8913.

Fill the answer fields directly on your screen or print the form and complete it by hand. Your answers will be read electronically; therefore if you complete the form by hand:

- use black ink and fill in circles completely: Correct ● Incorrect (X) ✓
- print clearly in CAPITAL letters and skip a box between words:  
1 5 ) E L M S T
- report dollar amounts (such as \$12,356.41) like this:  
\$ 1 2 3 5 6 no cents

Blue is for student information and purple is for parent information.

### Mailing Your FAFSA<sup>®</sup>

After you complete this application, make a copy of pages 3 through 8 for your records. Then mail the original of pages 3 through 8 to:

**Federal Student Aid Programs, P.O. Box 7650, London, KY 40742-7650.**

After your application is processed, you will receive a summary of your information in your *Student Aid Report (SAR)*. If you provide an e-mail address, your SAR will be sent by e-mail within three to five days. If you do not provide an e-mail address, your SAR will be mailed to you within three weeks. If you would like to check the status of your FAFSA, go to **fafsa.gov** or call 1-800-433-3243.

### Let's Get Started!

Now go to page 3 of the application form and begin filling it out. Refer to the notes on pages 9 and 10 as instructed.

Higher Education Opportunity Grant – June 1, 2018 (date received)  
For many state financial aid programs – March 2, 2018 (date postmarked) + \*  
For additional community college Cal Grants – September 2, 2018 (date postmarked) + \*  
Contact the California Student Aid Commission or your financial aid administrator for more information.

CA	For additional community college Cal Grants – September 2, 2018 (date postmarked) + *
CT	February 15, 2018 (date received) # *
DC	FAFSA completed by May 1, 2018 # For DCTAG, complete the DC OneApp and submit supporting documents by May 31, 2018. #
DE	April 15, 2018 (date received)
FL	May 15, 2018 (date processed)
IA	July 1, 2018 (date received) – Earlier priority deadlines may exist for certain programs. *
ID	Opportunity Grant – March 1, 2018 (date received) # *
IL	As soon as possible after October 1, 2017 \$
IN	March 10, 2018 (date received)
KS	April 1, 2018 (date received) # *
KY	As soon as possible after October 1, 2017 \$
LA	July 1, 2019 (July 1, 2018 recommended)
MA	May 1, 2018 (date received) #
MD	March 1, 2018 (date received)
ME	May 1, 2018 (date received)
MI	March 1, 2018 (date received)
MN	30 days after term starts (date received)
MO	February 1, 2018 # Applications accepted through April 2, 2018 \$ (date received)
MP	April 30, 2018 # *
MS	MTAG and MESH Grants – September 15, 2018 (date received) HELP Scholarship – March 31, 2018 (date received)
NC	As soon as possible after October 1, 2017 \$
ND	As soon as possible after October 1, 2017 \$
NJ	2017-2018 Tuition Aid Grant recipients – April 15, 2018 (date received) All other applicants: - Fall and spring terms – September 15, 2018 (date received) - Spring term only – February 15, 2019 (date received)
NV	Silver State Opportunity Grant – As soon as possible after October 1, 2017 \$ All other aid – Check with your financial aid administrator. *
NY	June 30, 2019 (date received) *
OH	October 1, 2018 (date received)
OK	As soon as possible after October 1, 2017 \$ OSAC Private Scholarships – March 1, 2018 * Oregon Promise Grant – Contact state agency. *
OR	Oregon Opportunity Grant – As soon as possible after October 1, 2017 \$
PA	All first-time applicants enrolled in a: community college; business/trade/technical school; hospital school of nursing; designated Pennsylvania Open-Admission institution; or non-transferable two-year program – August 1, 2018 (date received) All other applicants – May 1, 2018 (date received) *
SC	Tuition Grants – June 30, 2018 (date received) SC Commission on Higher Education Need-based Grants – As soon as possible after October 1, 2017 \$
TN	State Grant – Prior-year recipients receive award if eligible and apply by January 16, 2018. All other awards made to neediest applicants. \$ Tennessee Promise – January 16, 2018 State Lottery – Fall term, September 1, 2018 (date received); spring & summer terms, February 1, 2019 (date received)
TX	As soon as possible after October 1, 2017 Texas public colleges – March 15, 2018 # * Texas private colleges – Check with your financial aid administrator. *
VT	As soon as possible after October 1, 2017 # *
WA	As soon as possible after October 1, 2017 \$
WV	PROMISE Scholarship – March 1, 2018. New applicants must submit additional application. Contact your financial aid administrator or state agency. WV Higher Education Grant Program – April 15, 2018

STATE AID DEADLINES

# What is the FAFSA® ?

## Why fill out a FAFSA?

The **Free Application for Federal Student Aid** (FAFSA) is the first step in the financial aid process. You use the FAFSA to apply for federal student aid, such as grants, work-study, and loans. In addition, most states and colleges use information from the FAFSA to award nonfederal aid.

## Why all the questions?

The questions on the FAFSA are required to calculate your Expected Family Contribution (EFC). The EFC measures your family's financial strength and is used to determine your financial aid. Your state and the colleges you list may also use this information. They will determine if you may be eligible for state and institutional aid.

Notes are being modified.

## How do I find out what my Expected Family Contribution (EFC) is?

Your EFC will be listed on your *Student Aid Report* (SAR). Your SAR summarizes the information you submitted on your FAFSA. It is important to review your SAR to make sure all of your information is correct and complete. Make corrections or provide additional information, as necessary.

## How much student financial aid will I receive?

Using the information on your FAFSA and your EFC, the financial aid office at your college will determine the amount of aid you will receive. The college will use your EFC to prepare a financial aid package to help you meet your financial need. Financial need is the difference between the cost of attendance (which can include living expenses), as determined by your college, and your EFC. If you are eligible for a Federal Pell Grant, you may receive it from only one college for the same period of enrollment. If you or your family has unusual circumstances that should be taken into account, contact your college's financial aid office. Some examples of unusual circumstances are: unusual medical or dental expenses or a large change in income from 2016 to this year.

## When will I receive the student financial aid?

Any financial aid you are eligible to receive will be paid to you through your college. Typically, your college will first use the aid to pay tuition, fees and room and board (if provided by the college). Any remaining aid is paid to you for your other educational expenses.

## How can I have more colleges receive my FAFSA information?

If you are completing a paper FAFSA, you can only list four colleges in the school code step. You may add more colleges by doing one of the following:

- After your FAFSA has been processed, go to *FAFSA on the Web* at [fafsa.gov](http://fafsa.gov). Click the "Login" button on the home page to log in to *FAFSA on the Web*, then click "Make FAFSA Corrections."
- Use the *Student Aid Report* (SAR), which you will receive after your FAFSA is processed. Your Data Release Number (DRN) verifies your identity and will be listed on the first page of your SAR. You can call 1-800-433-3243 and provide your DRN to a customer service representative, who will add more school codes for you.
- Provide your DRN to the financial aid administrator at the college you want added, and he or she can add their school code to your FAFSA.
- **Note:** Your FAFSA record can only list up to ten school codes. If there are ten school codes on your record, each new code will need to replace one of the school codes listed.

## Where can I receive more information on student financial aid?

The best place for information about student financial aid is the financial aid office at the college you plan to attend. The financial aid administrator can tell you about student aid available from your state, the college itself and other sources.

- You can also visit our web site [StudentAid.gov](http://StudentAid.gov).
- For information by phone you can call our Federal Student Aid Information Center at 1-800-433-3243. TTY users (for the hearing impaired) may call 1-800-730-8913.
- You can also check with your high school counselor, your state aid agency or your local library's reference section.

Information about other nonfederal assistance may be available from foundations, faith-based organizations, community organizations and civic groups, as well as organizations related to your field of interest, such as the American Association or American Bar Association. Check with your parents' employers or unions to see if they award scholarships or have **tuition payment plans**.

Notes are being modified.

# Information on the Privacy Act and use of your Social Security Number

We use the information that you provide on this form to determine if you are eligible to receive federal student financial aid and the amount that you are eligible to receive. Sections 483 and 484 of the Higher Education Act of 1965, as amended, give us the authority to ask you and your parents these questions, and to collect the Social Security Numbers of you and your parents. We use your Social Security Number to verify your identity and retrieve your records, and we may request your Social Security Number again for those purposes.

State and institutional student financial aid programs may also use the information that you provide on this form to determine if you are eligible to receive state and institutional aid and the need that you have for such aid. Therefore, we will disclose the information that you provide on this form to each institution you list in questions 103a - 103h, state agencies in your state of legal residence and the state agencies of the states in which the colleges that you list in questions 103a - 103h are located.

If you are applying solely for federal aid, you must answer all of the following questions that apply to you: 1-9, 14-16, 18, 21-23, 26, 28-29, 32-37, 39-59, 61-68, 70, 73-86, 88-102, 104-105. If you do not answer these questions, you will not receive federal aid.

Without your consent, we may disclose information that you provide to entities under a published "routine use." Under such a routine use, we may disclose information to third parties that we have authorized to assist us in administering the above programs; to other federal agencies under computer matching programs, such as those with the Internal Revenue Service, Social Security Administration, Selective Service System, Department of Homeland Security, Department of Justice and Veterans Affairs; to your parents or spouse; and to members of Congress if you ask them to help you with student aid questions.

If the federal government, the U.S. Department of Education, or an employee of the U.S. Department of Education is involved in litigation, we may send information to the Department of Justice, or a court or adjudicative body, if the disclosure is related to financial aid and certain conditions are met. In addition, we may send your information to a foreign, federal, state, or local enforcement agency if the information that you submitted indicates a violation or potential violation of law, for which that agency has jurisdiction for investigation or prosecution. Finally, we may send information regarding a claim that is determined to be valid and overdue to a consumer reporting agency. This information includes identifiers from the record; the amount, status and history of the claim; and the program under which the claim arose.

## State Certification

By submitting this application, you are giving your state financial aid agency permission to verify any statement on this form and to obtain income tax information for all persons required to report income on this form.

## The Paperwork Reduction Act of 1995

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is 1845-0001. Public reporting burden for this collection of information is estimated to average one and a half hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is voluntary. If you have comments or concerns regarding the status of your individual submission of this form, please contact the Federal Student Aid Information Center, P.O. Box 84, Washington, D.C. 20044 directly. [Note: Please do not return the completed form to this address.]

We may request additional information from you to process your application more efficiently. We will collect this additional information only as needed and on a voluntary basis.





27. What is the name of the high school where you received or will receive your high school diploma?  
Enter the complete high school name, and the city and state where the high school is located.

High School Name

High School City

STATE

28. Will you have your first bachelor's degree before you begin the 2018-2019 school year?

Yes  1 No  2

29. What will your college grade level be when you begin the 2018-2019 school year?

- Never attended college and 1st year undergraduate .....  0
- Attended college before and 1st year undergraduate .....  1
- 2nd year undergraduate/sophomore .....  2
- 3rd year undergraduate/junior .....  3
- 4th year undergraduate/senior .....  4
- 5th year/other undergraduate .....  5
- 1st year graduate/professional .....  6
- Continuing graduate/professional or beyond .....  7

30. What degree or certificate will you be working on when you begin the 2018-2019 school year?

- 1st bachelor's degree .....  1
- 2nd bachelor's degree .....  2
- Associate degree (occupational or technical program) .....  3
- Associate degree (general education or transfer program) .....  4
- Certificate or diploma (occupational, technical or education program of less than two years) .....  5
- Certificate or diploma (occupational, technical or education program of two or more years) .....  6
- Teaching credential (nondegree program) .....  7
- Graduate or professional degree .....  8
- Other/undecided .....  9

31. Are you interested in being considered for work-study?

Yes  1 No  2 Don't know  3

**Step Two (Student):**

Answer questions 32–58 about yourself (the student). If you were never married, or are separated, divorced or widowed and are not remarried, answer only about yourself. If you are married or remarried as of today, include information about your spouse.

32. For 2016, have you (the student) completed your IRS income tax return or another tax return listed in question 33?

- I have already completed my return .....  1
- I will file but have not yet completed my return .....  2
- I'm not going to file. **Skip to question 39.**  3

33. What income tax return did you file or will you file for 2016?

- IRS 1040 .....  1
- IRS 1040A or 1040EZ .....  2
- A foreign tax return. **See Notes page 9.** .....  3
- A tax return with Puerto Rico, another U.S. territory, or Freely Associated State. **See Notes page 9.** .....  4

34. For 2016, what is or will be your tax filing status according to your tax return?

- Single .....  1
- Head of household .....  4
- Married—filed joint return .....  2
- Married—filed separate return .....  3
- Qualifying widow(er) .....  5
- Don't know .....  6

35. If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ?  
**See Notes page 9.**

Yes  1 No  2 Don't know  3

For questions 36–45, if the answer is zero or the question does not apply to you, enter 0. Report whole dollar amounts with no cents.

36. What was your (and spouse's) adjusted gross income for 2016? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.

\$

37. Enter your (and spouse's) income tax for 2016. Income tax amount is on IRS Form 1040—line 56 minus line 46; 1040A—line 28 minus line 36; or 1040EZ—line 10.

\$

38. Enter your (and spouse's) exemptions for 2016. Exemptions are on IRS Form 1040—line 6d or Form 1040A—line 6d. For Form 1040EZ, **see Notes page 9.**

Questions 39 and 40 ask about earnings (wages, salaries, tips, etc.) in 2016. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms or on the tax return selected in question 33: IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1. If any individual earning item is negative, do not include that item in your calculation.

39. How much did you earn from working in 2016?

\$

40. How much did your spouse earn from working in 2016?

\$

41. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? **Don't include** student financial aid.

\$

42. As of today, what is the net worth of your (and spouse's) investments, including real estate? **Don't include** the home you live in. **See Notes page 9.**

\$

43. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? **Don't include** a family farm or family business with 100 or fewer full-time or full-time equivalent employees. **See Notes page 9.**

\$

44. Student's 2016 Additional Financial Information (Enter the combined amounts for you and your spouse.)

- a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33. \$
- b. Child support paid because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in your household, as reported in question 95. \$
- c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. \$
- d. Taxable college grant and scholarship aid **reported to the IRS in your adjusted gross income**. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. \$
- e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. **Don't include** untaxed combat pay. \$
- f. Earnings from work under a cooperative education program offered by a college. \$

Question modified.

\$									
\$									
\$									
\$									
\$									
\$									

45. Student's 2016 Untaxed Income (Enter the combined amounts for you and your spouse.)

- a. 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 forms 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). \$
  - b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17. \$
  - c. Child support received for any of your children. **Don't include** foster care or adoption payments. \$
  - d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b. \$
  - e. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). **Exclude rollovers**. If negative, enter a zero here. \$
  - f. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). **Exclude rollovers**. If negative, enter a zero here. \$
  - g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing. \$
  - h. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. \$
  - i. Other untaxed income not reported in items 45a through 45h, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. **Don't include** extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. \$
  - j. 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. \$
- See Notes page 9.**

\$									
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**Step Three (Student):** Answer the questions in this step to determine if you will need to provide parental information. Once you answer **"Yes" to any** of the questions in this step, skip Step Four and go to Step Five on page 8.

- 46. Were you born before January 1, 1995? ..... Yes  1 No  2
- 47. As of today, are you married? (Also answer "Yes" if you are separated but not divorced.) ..... Yes  1 No  2
- 48. At the beginning of the 2018-2019 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)? ..... Yes  1 No  2
- 49. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training? **See Notes page 9.** .... Yes  1 No  2
- 50. Are you a veteran of the U.S. Armed Forces? **See Notes page 9.** ..... Yes  1 No  2
- 51. Do you now have or will you have children who will receive more than half of their support from you between July 1, 2018 and June 30, 2019? ..... Yes  1 No  2
- 52. 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, 2019? ..... Yes  1 No  2
- 53. 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? **See Notes page 10.** ..... Yes  1 No  2
- 54. As determined by a court in your state of legal residence, are you or were you an emancipated minor? **See Notes page 10.** ... Yes  1 No  2
- 55. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence? **See Notes page 10.** ..... Yes  1 No  2
- 56. At any time on or after July 1, 2017, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 10.** ..... Yes  1 No  2
- 57. At any time on or after July 1, 2017, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 10.** ..... Yes  1 No  2
- 58. At any time on or after July 1, 2017, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 10.** ..... Yes  1 No  2

Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2
Yes	<input type="radio"/>	1	No	<input type="radio"/>	2





For questions 85–94, if the answer is zero or the question does not apply, enter 0. Report whole dollar amounts with no cents.

- 85. What was your parents' adjusted gross income for 2016? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4. \$
- 86. Enter your parents' income tax for 2016. Income tax amount is on IRS Form 1040—line 56 minus line 46; 1040A—line 28 minus line 36; or 1040EZ—line 10. \$
- 87. Enter your parents' exemptions for 2016. Exemptions are on IRS Form 1040—line 6d or on Form 1040A—line 6d. For Form 1040EZ, see Notes page 9.

Questions 88 and 89 ask about earnings (wages, salaries, tips, etc.) in 2016. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms or on the tax return selected in question 81: IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1. If any individual earning item is negative, do not include that item in your calculation. Report the information for the parent listed in questions 61-64 in question 88 and the information for the parent listed in questions 65-68 in question 89.

- 88. How much did Parent 1 (father/mother/stepparent) earn from working in 2016? \$
- 89. How much did Parent 2 (father/mother/stepparent) earn from working in 2016? \$

- 90. As of today, what is your parents' total current balance of cash, savings, and checking accounts? **Don't include** student financial aid. \$
- 91. As of today, what is the net worth of your parents' investments, including real estate? **Don't include** the home in which your parents live. See Notes page 9. \$
- 92. As of today, what is the net worth of your parents' current businesses and/or investment farms? **Don't include** a family farm or family business with 100 or fewer full-time or full-time equivalent employees. See Notes page 9. \$

93. Parents' 2016 Additional Financial Information (Enter the amounts for your parent[s].)
- a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33. \$
  - b. Child support paid because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in your parents' household, as reported in question 73. \$
  - c. Your parents' taxable earnings from need-based employment programs, such as Federal Work-Study and need-based portions of fellowships and assistantships. \$
  - d. Your parents' taxable college grant and scholarship aid **reported to the IRS in your parents' adjusted gross income**. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. \$
  - e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. **Don't include** untaxed combat pay. \$
  - f. Earnings from work under a cooperative education program offered by a college. \$

Question modified.

94. Parents' 2016 Untaxed Income (Enter the amounts for your parent[s].)
- a. 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 forms 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). \$
  - b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17. \$
  - c. Child support received for any of your parents' children. **Don't include** foster care or adoption payments. \$
  - d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b. \$
  - e. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). **Exclude rollovers.** If negative, enter a zero here. \$
  - f. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). **Exclude rollovers.** If negative, enter a zero here. \$
  - g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing. \$
  - h. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. \$
  - i. Other untaxed income not reported in items 94a through 94h, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. **Don't include** extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels. \$

**Step Five (Student):** Complete this step only if you (the student) answered "Yes" to any questions in Step Three.

95. How many people are in your household?  
Include:  
 • yourself (and your spouse),  
 • your children, if you will provide more than half of their support between July 1, 2018 and June 30, 2019, even if they do not live with you, and  
 • other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2018 and June 30, 2019.

96. How many people in your (and your spouse's) household (from question 95) will be college students between July 1, 2018 and June 30, 2019? Always count yourself as a college student. Do not include family members who are in U.S. military service academies. Include others only if they will attend, at least half-time in 2018-2019, a program that leads to a college degree or certificate.

At any time during 2016 or 2017, did you (or your spouse) or anyone in your household (from question 95) receive benefits from any of the federal programs listed? Mark all that apply. Answering these questions will NOT reduce eligibility for student aid or these programs. TANF has different names in many states. Call 1-800-433-3243 to find out the name of your state's program. If you (or your spouse) or anyone in your household receives any of these benefits after filing the FAFSA but before December 31, 2017, you must update your response by logging in to **fafsa.gov** and selecting "Make FAFSA Corrections."

97. Medicaid or Supplemental Security Income (SSI)  98. Supplemental Nutrition Assistance Program (SNAP)  99. Free or Reduced Price School Lunch  100. Temporary Assistance for Needy Families (TANF)  101. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

102. As of today, are you (or your spouse) a dislocated worker? **See Notes page 10.** Yes  1 No  2 Don't know  3

**Step Six (Student):** Indicate which colleges you want to receive your FAFSA information.

**Instructions modified.**

Enter the six-digit federal school code and your housing plans for each college or school you want to receive your FAFSA information. Find the school codes at **fafsa.gov** or by calling 1-800-433-3243. If you cannot obtain a code, write in the complete name, address, city and state of the college. If you want more schools to receive your FAFSA information, read **What is the FAFSA?** on page 2. All of the information you included on your FAFSA, with the exception of the list of colleges, will be sent to each of the colleges you listed. In addition, all of your FAFSA information, including the list of colleges, will be sent to your state student grant agency. 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. Check with your state grant agency for more information.

	1ST FEDERAL SCHOOL CODE	OR	NAME OF COLLEGE ADDRESS AND CITY	STATE	HOUSING PLANS
103.a	<input type="text"/>		<input type="text"/>	<input type="text"/>	103.b on campus <input type="radio"/> 1 with parent <input type="radio"/> 2 off campus <input type="radio"/> 3
103.c	<input type="text"/>		<input type="text"/>	<input type="text"/>	103.d on campus <input type="radio"/> 1 with parent <input type="radio"/> 2 off campus <input type="radio"/> 3
103.e	<input type="text"/>		<input type="text"/>	<input type="text"/>	103.f on campus <input type="radio"/> 1 with parent <input type="radio"/> 2 off campus <input type="radio"/> 3
103.g	<input type="text"/>		<input type="text"/>	<input type="text"/>	103.h on campus <input type="radio"/> 1 with parent <input type="radio"/> 2 off campus <input type="radio"/> 3

**Step Seven (Student and Parent):** Read, sign and date.

If you are the student, by signing this application you 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 college if you default on a federal student loan and (5) will not receive a Federal Pell Grant from more than one college for the same period of time.

If you are the parent or the student, by signing this application 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. This information may include U.S. or state income tax forms that you filed or are required to file. Also, you certify that you understand that **the Secretary of Education has the authority to verify information reported on this application with the Internal Revenue Service and other federal agencies.** If you electronically sign any document related to the federal student aid programs using an FSA ID (username and password) and/or any other credential, you certify that you are the person identified by that username and password and/or other credential, and have not disclosed that username and password and/or other credential to anyone else. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison or both.

104. Date this form was completed  
 MONTH DAY 2017   
 2018   
 2019

105. Student (Sign below)

Parent (A parent from Step Four sign below.)

If a fee was paid to someone for advice or for completing this form, that person must complete this section.

Preparer's name, firm and address

106. Preparer's phone number (or 107)

107. Employer ID number (or 106)

108. Preparer's signature and date

COLLEGE USE ONLY

D/O  1 Homeless Youth Determination  4

FAA Signature

DATA ENTRY USE ONLY:  P  \*  L  E

### Notes for question 8 (page 3)

Enter your Social Security Number (SSN) as it appears on your Social Security card. If you are a resident of the Freely Associated States (i.e., the Republic of Palau, the Republic of the Marshall Islands, or the Federated States of Micronesia) and were issued an identification number beginning with "666" when submitting a FAFSA previously, enter that number here. If you are a first-time applicant from the Freely Associated States, enter "666" in the first three boxes of the SSN field and leave the remaining six positions blank and we will create an identification number to be used for federal student aid purposes.

### Notes for questions 14 and 15 (page 3)

If you are an eligible noncitizen, write in your eight- or nine-digit Alien Registration Number. Generally, you are an eligible noncitizen if you are (1) a permanent U.S. resident with a Permanent Resident Card (I-551); (2) a conditional permanent resident with a Conditional Green Card (I-551C); (3) the holder of an Arrival-Departure Record (I-94) from the Department of Homeland Security showing any one of the following designations: "Refugee," "Asylum Granted," "Parolee" (I-94 confirms that you were paroled for a minimum of one year and status has not expired), T-Visa holder (T-1, T-2, T-3, etc.) or "Cuban-Haitian Entrant;" or (4) the holder of a valid certification or eligibility letter from the Department of Health and Human Services showing a designation of "Victim of human trafficking."

If you are in the U.S. and have been granted Deferred Action for Childhood Arrivals (DACA), an F1 or F2 student visa, a J1 or J2 exchange visitor visa, or a G series visa (pertaining to international organizations), select "No, I am not a citizen or eligible noncitizen." You will not be eligible for federal student aid. If you have a Social Security Number but are not a citizen or an eligible noncitizen, including if you have been granted DACA, you should still complete the FAFSA because you may be eligible for state or college aid.

### Notes for questions 16 and 17 (page 3)

Report your marital status as of the date you sign your FAFSA. If your marital status changes after you sign your FAFSA, check with the **financial aid office at the college**.

### Notes for questions 21 and 22 (page 3)

To be eligible for federal student aid, male citizens and male immigrants residing in the U.S. aged 18 through 25 are required to register with the Selective Service System, with limited exceptions. This requirement applies to any person assigned the sex of male at birth. The Selective Service System and the registration requirement for males preserve America's ability to provide resources in an emergency to the U.S. Armed Forces (Army, Navy, Air Force, Marines, or Coast Guard). For more information about the Selective Service System, visit [sss.gov](http://sss.gov). Forms are available at your local U.S. Post Office.

### Notes for questions 33 (page 4) and 81 (page 6)

If you filed or will file a foreign tax return, a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island or the Northern Marianas Islands) or one of the Freely Associated States, use the information from that return to fill out this form. If you filed a foreign return, convert all monetary units to U.S. dollars, using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to [federalreserve.gov/releases/h10/current](http://federalreserve.gov/releases/h10/current).

### Notes for questions 35 (page 4) and 83 (page 6)

In general, a person is eligible to file a 1040A or 1040EZ if he or she makes less than \$100,000, does not itemize deductions, does not receive income from his or her own business or farm and does not receive alimony. A person is not eligible to file a 1040A or 1040EZ if he or she makes \$100,000 or more, itemizes deductions, receives income from his or her own business or farm, is self-employed, receives alimony or is required to file Schedule D for capital gains. If you filed a 1040 only to claim the American Opportunity Tax Credit or Lifetime Learning Tax Credit, and you would have otherwise been eligible to file a 1040A or 1040EZ, answer "Yes" to this question. If you filed a 1040 and were not required to file a tax return, answer "Yes" to this question.

### Notes for questions 38 (page 4) and 87 (page 7) — Notes for those who filed a 1040EZ

On the 1040EZ, if a person didn't check either box on line 5, enter 01 if he or she is single or has never been married, or 02 if he or she is married. If a person checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$4,050 equals one exemption).

### Notes for questions 42 and 43 (page 4), 45j (page 5), and 91 and 92 (page 7)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

**Investments include** real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

**Investments also include** qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student's spouse) are reported as student investments in question 42. For a student who must report parental information, the accounts are reported as parental investments in question 91, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

**Money received, or paid on your behalf**, also includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, uncles, and non-custodial parents). You must include these distribution amounts in question 45j.

**Investments do not include** the home you live in, the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 41 and 90.

**Investments also do not include** UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

**Business and/or investment farm value includes** the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

**Business value does not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

**Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

### Notes for question 49 (page 5)

Answer "Yes" if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.

Answer "No" if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes.

### Notes for question 50 (page 5)

Answer "Yes" (you are a veteran) if you (1) have engaged in active duty (including basic training) in the U.S. Armed Forces, or are a National Guard or Reserves enlistee who was called to active duty for other than state or training purposes, or were a cadet or midshipman at one of the service academies, **and** (2) were released under a condition other than dishonorable. Also answer "Yes" if you are not a veteran now but will be one by June 30, 2019.

Answer "No" (you are not a veteran) if you (1) have never engaged in active duty (including basic training) in the U.S. Armed Forces, (2) are currently an ROTC student or a cadet or midshipman at a service academy, (3) are a National Guard or Reserves enlistee activated only for state or training purposes, or (4) were engaged in active duty in the U.S. Armed Forces but released under dishonorable conditions.

**Notes modified.** you are currently serving in the U.S. Armed Forces serve through June 30, 2019.



### Notes for question 53 (page 5)

Answer **“Yes”** if at any time since you turned age 13:

- You had no living parent, even if you are now adopted; or
- You were in foster care, even if you are no longer in foster care today; or
- You were a dependent or ward of the court, even if you are no longer a dependent or ward of the court today. For federal student aid purposes, someone who is incarcerated is not considered a ward of the court.

If you are not sure if you were in foster care, check with your state child welfare agency. You can find that agency’s contact information at [childwelfare.gov/nfcad](http://childwelfare.gov/nfcad).

The financial aid administrator at your school may require you to provide proof that you were in foster care or a dependent or ward of the court.

### Notes for questions 54 and 55 (page 5)

The definition of legal guardianship does not include your parents, even if they were appointed by a court to be your guardians. You are also not considered a legal guardian of yourself.

Answer **“Yes”** if you can provide a copy of a court’s decision that as of today you are an emancipated minor or are in legal guardianship. Also answer **“Yes”** if you can provide a copy of a court’s decision that you were an emancipated minor or were in legal guardianship immediately before you reached the age of being an adult in your state. The court must be located in your state of legal residence at the time the court’s decision was issued.

Answer **“No”** if you are still a minor and the court decision is no longer in effect or the court decision was not in effect at the time you became an adult. Also answer **“No”** and contact your school if custody was awarded by the courts and the court papers say “custody” (not “guardianship”).

The financial aid administrator at your college may require you to provide proof that you were an emancipated minor or in legal guardianship.

### Notes for questions 56–58 (page 5)

Answer **“Yes”** if you received a determination at any time on or after July 1, 2017, that you were an unaccompanied youth who was homeless or at risk of being homeless.

- **“Homeless”** means lacking fixed, regular and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent, you may be considered homeless even if your parent would otherwise provide a place to live.
- **“Unaccompanied”** means you are not living in the physical custody of your parent or guardian.

Answer **“No”** if you are not homeless or at risk of being homeless, or do not have a determination. However, even if you answer **“No”** to each of questions 56, 57, and 58, you should contact the financial aid administrator at the college you plan to attend if you are either (1) homeless and unaccompanied or (2) at risk of being homeless, unaccompanied, and providing for your own living expenses - as your college financial aid office can determine that you are “homeless” and are not required to provide parental information.

The financial aid administrator at your college may require you to provide a copy of the determination if you answered **“Yes”** to any of these questions.

### Notes for students unable to provide parental information on pages 6 and 7

Under very limited circumstances (for example, your parents are incarcerated; you have left home due to an abusive family environment; or you do not know where your parents are and are unable to contact them), you may be able to submit your FAFSA without parental information. **If you are unable to provide parental information**, skip Steps Four and Five, and go to Step Six. Once you submit your FAFSA without parental data, **you must follow up with the financial aid office at the college you plan to attend**, in order to complete your FAFSA.

### Notes for Step Four, questions 59–94 (pages 6 and 7)

Review all instructions below to determine who is considered a parent on this form:

Notes modified.

- If your parent was never married and does not have a legal parent, or if your parent is widowed and remarried, answer the questions about that parent.
- If your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]) are not married to each other and **live together**, select “Unmarried and both legal parents living together” and provide information about both of them regardless of their gender. Do not include any person who is not married to your parent and who is not a legal or biological parent. Contact 1-800-433-3243 for assistance in completing questions 80-94, or visit [StudentAid.gov/fafsa-parent](http://StudentAid.gov/fafsa-parent).
- If your legal parents are married, select “Married or remarried.” If your legal parents are divorced but living together, select “Unmarried and both legal parents living together.” If your legal parents are separated but living together, select “Married or remarried,” not “Divorced or separated.”
- If your parents are divorced or separated, answer the questions about the parent you lived with more during the past 12 months. (If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent.) **If this parent is remarried as of today, answer the questions about that parent and your stepparent.**
- If your widowed parent is remarried as of today, answer the questions about that parent and your stepparent.

### Notes for questions 84 (page 6) and 102 (page 8)

In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster; or
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of relocating due to permanent change in duty station; or
- is the spouse of an active duty member of the Armed Forces and is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment; or
- is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay-at-home mom or dad), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.

Except for the spouse of an active duty member of the Armed Forces, if a person quits work, generally he or she is not considered a dislocated worker even if, for example, the person is receiving unemployment benefits.

Answer **“Yes”** to question 84 if your parent is a dislocated worker. Answer **“Yes”** to question 102 if you or your spouse is a dislocated worker.

Answer **“No”** to question 84 if your parent is not a dislocated worker. Answer **“No”** to question 102 if neither you nor your spouse is a dislocated worker.

Answer **“Don’t know”** to question 84 if you are not sure whether your parent is a dislocated worker. Answer **“Don’t know”** to question 102 if you are not sure whether you or your spouse is a dislocated worker. You can contact your financial aid office for assistance in answering these questions.

The financial aid administrator at your college may require you to provide proof that your parent is a dislocated worker, if you answered **“Yes”** to question 84, or that you or your spouse is a dislocated worker, if you answered **“Yes”** to question 102.

**Summary of Enhancements to the  
2018-2019 Free Application for Federal Student Aid (FAFSA®)**

**Section 1: In this section, we've described changes to the 2018-2019 PDF FAFSA resulting from public comments. Some of these changes also impact fafsa.gov**

**Page 1**

Column 1

- Under the Filling Out the FAFSA section, we added text to the first sentence so that it now reads, "If you or your family experienced significant changes to your financial situation (such as loss of employment), or other unusual circumstances (such as tuition expenses at an elementary or secondary school or high unreimbursed medical or dental expenses), complete this form to the extent you can and submit it as instructed."

Column 2

- We updated state deadline information.

**Page 2**

Column 1

- In the first sentence of the "Why all the questions?" section, we changed the start of the sentence so that it now reads "Most of the questions on the FAFSA are required to calculate your Expected Family Contribution (EFC)."
- We also changed the last sentence in the "Where can I receive more information about student financial aid?" section to replace "tuition payment plans" with "tuition assistance plans," so that it now reads "Check with your parents' employers or unions to see if they award scholarships or have tuition assistance plans."

**Page 3**

We updated question 22 from "Are you male or female?" to "Were you born male or female?"

In addition, we updated question 23 text so that it now reads "**If female, skip to question 23.** Most male students must register with the Selective Service System to receive federal aid. If you were born male, are age 18-25, and have not registered, fill in the circle and we will register you."

**Page 5**

We updated the text in Question 44d so that it now reads "Taxable college grant and scholarship aid **reported to the IRS as income.** Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships."

**Page 7**

We updated the text in Question 93d so that it now reads “Your parents’ taxable college grant and scholarship aid **reported to the IRS as income**. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.”

**Page 8**

We removed “student” from references to state student grant agencies and added a hyperlink to a resource page with information about how state grant agencies award aid so that the text reads as follows:

“Enter the six-digit federal school code and your housing plans for each college or school you want to receive your FAFSA information. You can find the school codes at [fafsa.gov](http://fafsa.gov) or by calling 1-800-433-3243. If you cannot obtain a code, write in the complete name, address, city and state of the college. If you want more schools to receive your FAFSA information, read *What is the FAFSA?* on page 2. All of the information you included on your FAFSA, *with the exception of the list of colleges*, will be sent to each of the colleges you listed. In addition, all of your FAFSA information, *including the list of colleges*, will be sent to your state grant agency. 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. Consult your state agency or [StudentAid.gov/order](http://StudentAid.gov/order) for details.”

**Section 2: 2018-2019 Enhancements to the PDF FAFSA communicated in the Federal Register posted April 17, 2017**

**Global Changes:** We’ve updated date and year references.

URLs have been updated to remove [www](http://www). to comply with an Office of Management and Budget (OMB) federal memorandum (OMB Memorandum M-15-13) that requires all publicly-accessible federal Web sites to provide service only through a secure internet connection.

**Page 1**

We’ve removed “view and” from the first paragraph, last sentence of the “Using Your Tax Return” section so it reads, “In a few simple steps....can transfer their tax return...”

We’ve updated the year references in Column 2. However, deadline dates in this draft of the FAFSA are not final. Dates will be finalized in consultation with the states, and included in the draft of the FAFSA posted for the 30-day public comment period. (See update in Section 1)

**Page 6**

- We removed “legal” from Question 59 so it now reads: “As of today, what is the marital status of your parents?”.
- We added “legal” to the second response for Question 59 so it now reads: “Unmarried and both legal parents living together”.
- We added “legal” to the note before Question 80 to match the revised response option for Question 59.

## Page 8

- We've updated the text in the Step Six instructions to read:

"Enter the six-digit federal school code and your housing plans for each college or school you want to receive your FAFSA information. You can find the school codes at [fafsa.gov](http://fafsa.gov) or by calling 1-800-433-3243. If you cannot obtain a code, write in the complete name, address, city and state of the college. If you want more schools to receive your FAFSA information, read *What is the FAFSA?* on page 2. All of the information you included on your FAFSA, *with the exception of the list of colleges*, will be sent to each of the colleges you listed. In addition, all of your FAFSA information, *including the list of colleges*, will be sent to your state student grant agency. 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. Check with your state grant agency for more information." (See update in Section 1)

- We updated the second paragraph of the Certification Statement in Step Seven to remove references to "PIN." The new sentence reads:  
"If you electronically sign any document related to the federal student aid programs using an FSA ID (username and password) and/or any other credential, you certify that you are the person identified by that username and password and/or other credential, and have not disclosed that username and password and/or other credential to anyone else."

## Page 9

We updated the exemption amount in the "Notes for questions 38 (page 4) and 87 (page 7)" section from \$4,000 to \$4,050.

## Page 10

In the "Notes for questions 56–58 (page 5)" section, we made the following changes:

- We removed the "Youth" definition bullet.
- We deleted "under 24 years of age and are" in the second sentence of the second paragraph so it now reads: "However, even if you answer **No** to each of questions 56, 57, and 58, you should contact the financial aid administrator at the college you plan to attend if you are either (1) homeless and unaccompanied or (2) at risk of being homeless, unaccompanied, and providing for your own living expenses - as your college financial aid office can determine that you are "homeless" and are not required to provide parental information."
- We updated the second and third bullets in the "Notes for Step Four, question 59-94 (pages 6 and 7)" section by adding "legal" to "Unmarried and both parents living together".

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**Summary of Enhancements to fafsa.gov for  
2018-2019**

This document describes changes specific to fafsa.gov. It has been updated to incorporate more detail about planned changes previously described, as well as those changes resulting from public comments. Changes that impact both the PDF FAFSA and fafsa.gov are described in the *Summary of Enhancements to the 2018-2019 Free Application for Federal Student Aid (FAFSA®)*

Most applicants fill out the *Free Application for Federal Student Aid (FAFSA®)* online. Because we are unable to create an online experience that allows the public to view the 2018-2019 changes to fafsa.gov during the public comment period, reviewers are encouraged to utilize the 2017-2018 FAFSA Demonstration Site to view the current online application experience. When viewing the FAFSA online, please keep the following in mind:

- Experiences will vary based on how each FAFSA question is answered due to the dynamic display of text and extensive built-in skip logic. For example, some questions are worded differently based on marital status, tax filing status, etc. Also, certain questions are hidden depending on the selected state of legal residence and whether the answers to relevant questions make an applicant eligible for an automatic zero EFC.
- Changes to fafsa.gov for 2018-2019 start-up will not be available for viewing until the 2018-2019 Demonstration Site becomes available on September 24, 2017. You can access the 2017-2018 version of the FAFSA Demonstration Site at <https://fafsademo.test.ed.gov> using the following user name and password:

**User Name: eddemo**

**Password: fafsatest**

The changes described in this document do not impact the PDF FAFSA.

### **Planned Changes for 2018-2019 Start-up**

In partnership with the Internal Revenue Service (IRS), we will make changes to the IRS Data Retrieval Tool (IRS DRT) to enhance the privacy of applicant and parent IRS tax return information. In addition, we will expand the population of applicants and parents who are eligible to use the IRS DRT, as described below, to include those who filed an amended tax return.

Enhanced Privacy for IRS DRT users: In an [electronic announcement posted May 3, 2017](#), we informed the community that in order to address both privacy and security concerns related to the IRS DRT, the IRS and FSA agreed to implement a solution that will reinstate the use of the IRS DRT beginning with the 2018–19 FAFSA cycle. The solution, however, will limit the information that displays to the applicant in order to enhance the security and privacy of sensitive personal data transferred to the FAFSA from the IRS. Students’ and taxpayers’ information will be encrypted and hidden from the applicant’s view on both the IRS DRT web page and on [fafsa.gov](#). Messaging will be presented to applicants using the IRS DRT on both the IRS DRT web page and on [fafsa.gov](#) informing them that they will be unable to view their tax information on either web site.

More details regarding the encryption solution will be posted to IFAP as they become available.

Amended Tax Return Filers: Applicants and parents who have amended their tax return will be able to use the IRS DRT to transfer their IRS tax return information into the FAFSA. While the information transferred will be from the *original* tax return, the IRS will provide an indicator that communicates whether or not the taxpayer amended his/her tax return. This information will be included on the Institutional Student Information Record (ISIR) as an IRS Request Flag of 07, as appropriate for student or parent, or both.

As a result of this change, we will remove the filtering question “Did you file a Form 1040X amended tax return?” from the Student and Parent Financial Information pages. We have also added messaging informing applicants that the IRS indicated that an amended return is on file with the IRS and directing the applicant to contact the financial aid administrator if changes are needed to any of the data transferred from the IRS.

### Changes resulting from public comments

As a result of a public comment regarding applicants that wish to list more than 10 colleges on any particular transaction, we have revised help text to better inform applicants that every school listed on any transaction will receive an ISIR.

The revised help text will read as follows:

#### **If I want to apply to more than ten colleges, what should I do?**

You can list up to 10 colleges on your Free Application for Federal Student Aid (FAFSA). Once you receive your Student Aid Report (SAR), you can make the information available to more than 10 colleges through one of the options listed below. Each option will allow the college to receive an electronic copy of your SAR, and you will also receive an updated SAR.

Option 1: Click **Login** on the home page and log in to your FAFSA account. You will be given the option to **Make FAFSA Corrections**. Remove some of the colleges listed on your FAFSA, add the additional school codes, and submit the corrections for processing.

Option 2: Call the Federal Student Aid Information Center and have them add the colleges for you. When you call, you must provide the DRN from your SAR or confirmation page. Refer to the [Help](#) page for contact information.

Option 3: If you have a paper SAR, you can replace the colleges listed on the SAR with other colleges, and mail the SAR back to Federal Student Aid. Note that the paper SAR allows you to change up to four colleges – not all 10.

**Note:** If there are 10 colleges on your FAFSA, any new school codes that you add will replace one or more of the school codes already listed. When this change is made, any college removed from the list will not have automatic access to any **new** information you provide after you've removed that college. However, the college will still have the data you submitted when you listed that college on your FAFSA form. You are not deleting your FAFSA information from the college's system.

### Planned Mid-Cycle Changes

The following changes to [fafsa.gov](#) will not be available on October 1, 2017, but are expected to be implemented sometime during calendar year 2018. An Electronic Announcement will be posted to the [Information for Financial Aid Professionals](#) Web site prior to implementation to provide the community with more detailed information about the planned changes.

**Responsive Web Application:** The online user experience will be improved for all FAFSA filers due to responsive web design. By having a flexible Web portal that automatically adjusts view settings to meet the requirements of the accessing device, users can more efficiently access specific areas of the redesigned web pages. This enhancement allows those who choose to complete the FAFSA using a mobile device or tablet to have a better experience; it also benefits those who complete the FAFSA on a computer due to the improved overall look and feel.

Responsive web design is being applied via a multi-phased approach, so not all functions in [fafsa.gov](#) are impacted for 2018-2019.

**Integration with College Scorecard:** When a new applicant logs in to [fafsa.gov](#), he/she will be given the opportunity to link to the [College Scorecard](#) Web site to research colleges, and then transfer up to ten college selections into the FAFSA. If fewer than ten colleges are transferred, additional schools can still be selected while in the FAFSA by utilizing the current School Code Search functionality.

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## Resources

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[Free Application for Federal Student Aid \(FAFSA®\)](#)

[FSA ID](#)

[FSA Financial Aid Toolkit for Counselors](#)

[StudentAid.ed.gov](#)

U.S. Department of Education's (ED's) Infographics:

- [The FAFSA Process](#)
- [Do I Have to Provide My Parents' Information on the Free Application for Federal Student Aid \(FAFSA®\)?](#)
- [Who's My Parent When I Fill Out the FAFSA?](#)
- [The Financial Aid Process](#)

ED's guides for [Foster Youth](#) and [Financial Aid and Undocumented Students](#)

### FAFSA Processing Resources

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*Federal Register*, 5/1/17, p. 20322: [Federal Need Analysis Methodology for the 2018-2019 Award Year](#)

Dear Colleague Letter [GEN-16-07](#)

Electronic Announcement, 8/7/17: [Changes to the IRS Data Retrieval Tool Process for the 2018-19 FAFSA® Form](#)

Electronic Announcement, 7/13/17: [Notice of the updated Draft 2018-2019 Federal Student Aid Application Materials](#)

Electronic Announcement, 4/17/17: [Notice of the Draft 2018-2019 Federal Student Aid Application Materials](#)

Electronic Announcement, 8/4/16: [Revised Special Handling Process for FAFSA® Filers Under the Age of 13 Application and Verification Guide of the \*Federal Student Aid Handbook\*](#)

[SAR Comment Codes and Text, 2018-2019](#)

[The EFC Formula, 2018-2019](#)

### Outreach

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[FSA ID Digital & Social Outreach Tools to Help You Encourage Students \(and Parents\) to Get Their FSA IDs](#)

FSA Financial Aid Toolkit: [FAFSA Completion Social Media Resources](#) (2015–16)

ED's Homeroom blog post: ["9 Myths About the FSA ID"](#)

University of California Santa Barbara's video: ["7 Easy Steps to the FAFSA"](#)

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# Who Is My “Parent” When I Fill Out the FAFSA<sup>SM</sup>?

## Which parent’s information should I report on the FAFSA<sup>SM</sup>?

Maybe you know you’re considered a dependent student\* by the *Free Application for Federal Student Aid* (FAFSA<sup>SM</sup>), and you’re supposed to put information about your parents on the application. But what if your parents are divorced? Remarried? What if you live with your sister? Whose information should you report?

Below are some guidelines that might help. Unless otherwise noted, “parent” means your legal (biological and/or adoptive) parent or your stepparent. In addition, the rules below apply to your legal parents regardless of their gender.

- If your parents are living and legally married to each other, answer the questions about both of them.
- If your parents are living together and are not married, answer the questions about both of them.
- If your parent is widowed or was never married, answer the questions about that parent.
- 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 parent, give answers about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent.
- If your parents are divorced but live together, you’ll indicate their marital status as “Unmarried and both parents living together,” and you’ll answer the questions about both of them.
- If your parents are separated but live together, you’ll indicate their marital status as “Married or remarried,” and you’ll answer the questions about both of them.
- 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.
- The following people are not your parents unless they have adopted you: grandparents, foster parents, legal guardians, older brothers or sisters, and uncles or aunts.

**EXCEPTION:** The FAFSA asks about your parents’ education level. For these two questions, your parents are considered to be your birth parents or adoptive parents—your stepparent is not your parent in those questions.

## What if my parents are worried about providing their private information on the FAFSA?

Their information is safe with us. We recommend you fill out your FAFSA online, where your information is put into special code before it’s sent over the Internet to our processor. Also, we won’t share your FAFSA information with anyone except the schools you tell us you want to attend (so they can use the information to award financial aid to you) and a few federal and state government agencies (so they can check to be sure you’ve reported your information accurately or can assess your information to see what financial aid they could offer you).

## What if I don’t live with my parents?

You still must answer the questions about them if you’re considered a dependent student.

## What if my parents aren’t going to help me pay for college and refuse to provide information for my FAFSA?

You can’t be considered independent of your parents just because they refuse to help you with this process. If you do not provide their information on the FAFSA, the application will be considered “rejected,” and you might not be able to receive any federal student aid. The most you would be able to get (depending on what the financial aid administrator at your college decides) would be a loan called an unsubsidized loan.

The FAFSA will tell you what to do if you are in this situation. You also will need to speak to the financial aid administrator at the college or career school you plan to attend.

## What if I have no contact with my parents?

If you don’t know where your parents live, or you’ve left home due to an abusive situation, fill out the FAFSA and then immediately get in touch with the financial aid office at the college or career school you plan to attend. The financial aid administrator will tell you what to do next. Don’t put this off or you might miss financial aid deadlines!

*\*Find out whether you’re a dependent student: see “Am I Dependent or Independent?” at [StudentAid.gov/resources](http://StudentAid.gov/resources).*

For more information on federal student aid, visit [StudentAid.gov](http://StudentAid.gov) or call 1-800-4-FED-AID (1-800-433-3243).

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## Glossary for The Application Process

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**Adjustments:** Changes to data elements by a financial aid administrator exercising his or her professional judgment (PJ) authority.

**Award year:** The period from July 1 of one year to June 30 of the following year.

**Central Processing System (CPS):** The system used by the ED to process the FAFSA, calculate the expected family contribution (EFC), match applicant information against several federal databases, and notify the student and the school of the processing results.

**Citizenship status:** Whether the student is a U.S. citizen, U.S. national, eligible noncitizen, or neither citizen nor eligible noncitizen, will factor into an applicant's eligibility for Federal Student Aid.

**Conflicting information:** Information in a student's financial aid file that is contrary to information present elsewhere within the institution and that may affect his or her eligibility to receive Title IV aid. Conflicting information must be resolved in order for federal financial aid processing to proceed.

**Corrections:** Changes to incorrect data that must be made when errors are discovered.

**Database match:** Data Title IV aid applicants provide on the FAFSA is matched against available information in several government databases to confirm the information is true, provide additional information to institutions, and/or flag possible problems.

**Dependent student:** A student who does not meet the definition of an independent student as prescribed under section 480(d) of the HEA.

**Direct PLUS:** Long-term loans made through the Direct Loan Program to parents of dependent students and to graduate/professional students. The amount borrowed is limited to the COA minus EFA. A PLUS loan may be used to replace the EFC.

**Dislocated worker:** A person who:

- Meets all of the following:
  - Was terminated or laid off from employment or received a notice of termination or layoff,
  - Is eligible for or has exhausted his or her unemployment compensation, or is not eligible because, even though employed long enough to demonstrate attachment to the workforce, he or she had insufficient earnings or performed services for an employer that were not covered under a state's unemployment compensation law, and
  - Is unlikely to return to a previous industry or occupation;
- Was terminated or laid off from employment or received a notice of termination or layoff as a result of any permanent closure or substantial layoff at a plant, facility, or enterprise;
- Is employed at a facility at which the employer made a general announcement that such facility is closing, or will close within 180 days; or
- Is the spouse of an active duty member of the Armed Forces who:
  - Has experienced a loss of employment because of relocating due to permanent change in duty station, or
  - Is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment;
- Was self-employed, including farmers, ranchers, or fishermen, but is now unemployed due to general economic conditions in his or her community, or due to a natural disaster; or

- Is a displaced homemaker who:
  - Has been providing unpaid services to family members in the home;
  - Has been dependent on the income of another family member, but is no longer supported by that income; and
  - Is unemployed or underemployed and is having difficulty obtaining or upgrading employment.

[Note: an “underemployed” person is one who is working part time and wants to work full time, or one who is working below the demonstrated level of her education or job skills.]

**Emancipated minor:** One who has been released by the court from the control of a parent or guardian.

**Expected family contribution (EFC):** Estimate of a family’s ability to contribute toward postsecondary educational costs, derived by a formula known as “Federal Methodology.”

**Federal Student Aid (FSA):** The office within the U.S. Department of Education with administrative oversight for Title IV aid.

**Federal Student Aid Information Center (FSAIC):** The ED service that enables applicants to file a FAFSA or make changes to the data that was provided on the FAFSA. FSAIC customer service representatives also provide general federal student financial aid information and FAFSA guidance.

**Federal Student Aid (FSA) ID:** A personal identifier students and parents of dependent students may use to:

- Access personal information on the various Federal Student Aid electronic systems;
- Provide electronic signatures on the FAFSA on the Web;
- Sign Title IV loan master promissory notes (MPNs);
- Access and complete online Direct Loan counseling; and
- Review financial aid history information in the National Student Loan Data System (NSLDS).

**Financial need:** The difference between the institution’s cost of attendance and the family’s ability to pay (i.e., EFC). Ability to pay is represented by the EFC for federal need-based aid and for many state and institutional programs.

**Free Application for Federal Student Aid (FAFSA®):** The application used to apply for all Title IV aid. The FAFSA collects financial and other information used to calculate the EFC and to confirm a student’s eligibility via various database matches with other federal agencies.

**Higher Education Act of 1965, as amended (HEA):** The authorizing legislation for most of the federal student financial assistance programs. Established in 1965 by Congress, Title IV of the HEA authorizes the following programs: Federal Pell Grant, Iraq and Afghanistan Service Grant (IASG), Teacher Education Assistance for College and Higher Education (TEACH) Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Federal Work-Study (FWS), Federal Perkins Loan, and Federal Direct Student Loan (Direct Loan). Collectively, these programs are known as the Title IV programs and are administered by ED.

**Homeless or at risk of being homeless:** Lacking fixed, regular, and adequate housing, which includes living in shelters, motels, or automobiles, or temporarily living with other people because the student has nowhere else to go. A homeless student may use the school’s address as his or her home address on the FAFSA. “Fixed housing” means stationary, permanent, and not subject to change. “Regular housing” means used on a predictable, routine, or consistent basis. “Adequate housing” means sufficient for meeting both the physical and psychological needs typically met in the home.

**Independent student:** Under section 480(d) of the HEA, a student who:

- Will be 24 years of age by December 31 of the award year;
- Is married;
- Is a graduate or professional student;
- Is currently serving on active duty in the U.S. Armed Forces for purposes other than training;
- Is a veteran of the U.S. Armed Forces;
- Has children who will receive more than half of their support from the student during the award year;
- Has legal dependents other than children or a spouse who will receive more than half of their support from the student during the award year;
- Is or was an orphan, in foster care, or a dependent/ward of the court at any time since turning age 13;
- Is or was an emancipated minor as determined by a court in the student's state of legal residence;
- Is or was in legal guardianship as determined by a court in the student's state of legal residence;
- Was an unaccompanied youth who was homeless at any time on or after July 1 preceding the award year, as determined by a high school, school district homeless liaison, or director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development;
- Was homeless or self-supporting and at risk of being homeless at any time on or after July 1 preceding the award year, as determined by the director of a runaway or homeless youth basic center or transitional living program; or
- Based on the professional judgment decision of the financial aid administrator at the institution the student is attending, demonstrates independence based on documented unusual circumstances.

**Institutional Student Information Record (ISIR):** The electronic record the school receives as the result of the student listing that school on the FAFSA. If sufficient data is provided to the CPS, when the school receives the ISIR, it should contain information about the student's EFC, verification selection, database matches, and financial aid history.

**Legal dependents:** Children of the student (including those who will be born before the end of the award year) who receive more than half their support from the student, as well as other individuals (except a spouse) who live with and receive more than half their support from the student as of the date the FAFSA is signed and throughout the remainder of the award year covered by the FAFSA.

**Legal guardian:** Someone appointed by the court to serve as guardian to a minor under various circumstances. A student who has a legal guardian is not a ward of the court. The legal guardian or surrogate parent cannot act as the parent for the purpose of obtaining Title IV aid and cannot complete and sign the FAFSA.

**Means-tested federal benefit program:** A federal mandatory spending program, other than a Title IV program, in which eligibility for benefits or the amount of benefits is determined based on income or resources. Some examples of such programs include:

- Supplemental Security Income (SSI) Program;
- Supplemental Nutrition Assistance Program (SNAP);
- Free and Reduced Price School Lunch Program;
- Temporary Assistance for Needy Families (TANF) Program;
- Special Supplemental Nutrition Programs for Women, Infants, and Children (WIC);
- Medicaid Program; and
- Other programs identified by ED.

**National Student Loan Data System (NSLDS):** A national database containing Title IV loan information and selected Title IV grant data. NSLDS is used for a number of functions, including monitoring a student's annual and aggregate loan limits, loan defaults, loan and grant overpayments, as well as for enrollment reporting. Schools, guaranty agencies, and other entities provide data to NSLDS.

**Parent:** For Title IV purposes, a parent is the student's biological or adoptive mother or father. A stepparent also is considered a parent for PLUS purposes if the student's biological or adoptive parent has remarried at the time the FAFSA is filed. A stepparent is eligible to borrow PLUS if his or her income and assets would be taken into account when calculating the dependent student's EFC. A grandparent, another relative, or a legal guardian is not treated as a parent for FSA purposes unless that individual has legally adopted the student.

**Preparer:** A preparer is an individual who is paid a fee to help the student fill out the application.

**Professional judgment (PJ):** The authority provided under the HEA for financial aid administrators to exercise discretion and deal with unique circumstances affecting individual students on a case-by-case basis in a number of specific areas of federal student aid administration.

**Student Aid Report (SAR):** A paper or electronic output document sent to students as a result of the CPS receiving a FAFSA for the student. The CPS computes the official EFC and performs various checks and federal agency matches to confirm certain aspects of the student's eligibility for Title IV funds. The results of the matches and the EFC computation are conveyed on the output document.

**Student Aid Report (SAR) Acknowledgement:** A paper output document sent to a student that provides a summary of the processing result of applications entered electronically by the school or input via FAFSA on the Web and no email address was provided. It is also an eligibility document and provides the EFC number, but it cannot be used to make corrections like the SAR.

**Student eligibility:** Students must meet certain criteria to be eligible to receive Title IV aid. Eligibility is determined based on self-certified information, as well as information submitted to ED on the FAFSA, and data provided directly to higher education institutions.

**Title IV:** The section of the HEA pertaining to administration of the federal student financial assistance programs.

**Updates:** Required changes in certain situations where the applicant data were correct at the time the original application was filed, but have since changed.

**U.S. Department of Education (ED):** The Cabinet-level department of the United States government with oversight of the programs and funds authorized under the HEA that provide financial assistance to eligible students enrolled in postsecondary educational programs. Also referred to as "the Department."

**Veteran:** For Title IV purposes, someone who: 1) has engaged in at least 1 day of active duty in the U.S. Armed Forces (Army, Navy, Air Force, Marines, or Coast Guard) or as a member of the National Guard or Reserves who was called to active duty for purposes other than training, or was a cadet or midshipman at one of the service academies, or was a cadet or midshipman at one of the U.S. military academy preparatory schools; and 2) was released under a condition other than "dishonorable."

**Ward of the court:** For Title IV purposes, someone for whom the court has assumed full custody until the age of 18. Someone who has been emancipated (that is, a child who has been released from the control of a parent or guardian by the court) or who has been incarcerated is not considered a ward of the court.

# What's next?

## Please join us for the 2017-18 NASFAA Webinar Series



NASFAA's [live webinars](#) bring you the latest information, hot off the press, and allow you to actively engage with NASFAA staff and featured presenters from government, partner organizations, and fellow aid administrators.

[On Demand Webinars](#) are recordings of previously broadcasted events. The recordings are available for purchase and viewing at your convenience.

### Webinar Schedule for 2017-18 - See You Online!

Topic	Air Date
Completing the FAFSA: 2018-19	8/16/2017
FWS & Community Service	9/20/2017
Citizenship Issues Spotlight	10/18/2017
Verification 2018-19	11/1/2017
Direct Loan Issues Spotlight	12/6/2017
NASFAA Policy Update*	12/12/2017
Cash Management: Disbursements	1/10/2018
Student Eligibility Spotlight	1/24/2018
The Ethics of Enrollment Management	2/21/2018
Graduate Professional Town Hall*	3/7/2018
Trending Legal Issues in Financial Aid	3/14/2018
Student Financial Wellness in a Credit Card World	4/18/2018
Return of Title IV with Modules	5/16/2018
NASFAA Policy Update*	5/22/2018
Top 5 Compliance Issues and How to Avoid Them	6/6/2018

\* Complimentary for all Members. All other webinars are offered at the following rates:  
Site License: \$120 members/\$240 non-members/no charge for [webinar package](#) purchasers or Value Plus Members.

**This listing is current as of July 31, 2017. For additions and changes to this schedule, visit [nasfaa.org/2017-2018 webinars](http://nasfaa.org/2017-2018-webinars)**

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