How to file the FAFSA

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PHEAA
Pennsylvania Higher Education Assistance Agency

Welcome

We plan to provide you with information about:

- how to apply for an FSA Account (FSA ID)
- how to complete the FAFSA
- available resources

Pheaa.org/college-planning/student-aid-guide/

Certified Browsers

Mozilla Firefox
(Version 68+)

Google Chrome
(Version 76+)

Apple Safari
(Version 9+)

Visit studentaid.gov/help/browser-requirements for the most up-to-date information on browsers.

Documents Needed to Complete the FAFSA

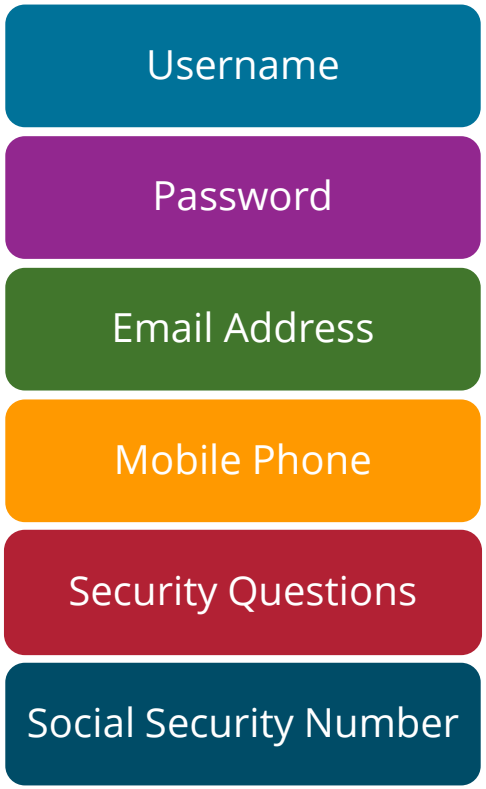
- Social Security numbers, alien registration number (if not a U.S. citizen)
- 2019 income tax and W2s (if employed)
- Untaxed income (Social Security benefits are not considered)
- CURRENT bank statements and records of other investment accounts (as of the FAFSA filing date)
- Email addresses
- Student's drivers license (optional)
- FSA Account (formerly known as FSA ID)

Create Your FSA ID Accounts

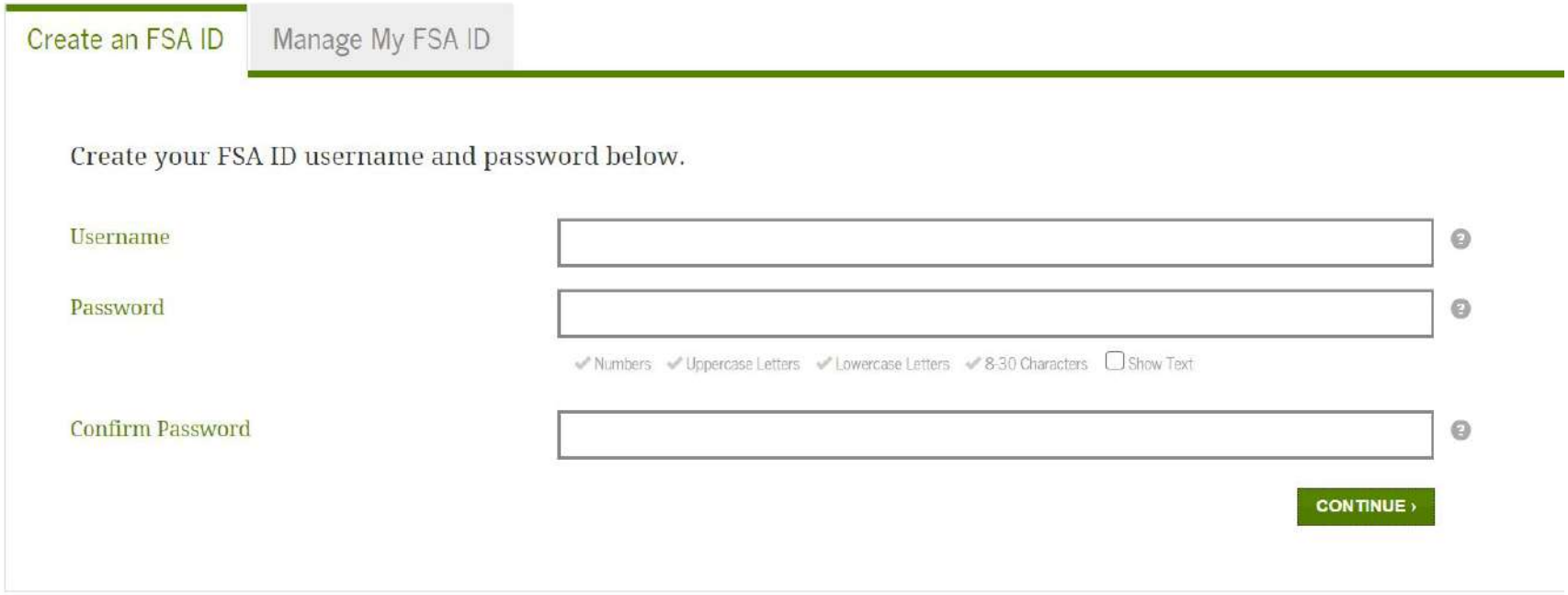
- The student applying for aid and one parent providing information on the FAFSA need to create an FSA ID at Studentaid.gov/fsaid

- Create prior to completing the FAFSA.
- Legal signature for student and parent.
- Provides access to FAFSA and Federal Student Aid online systems.

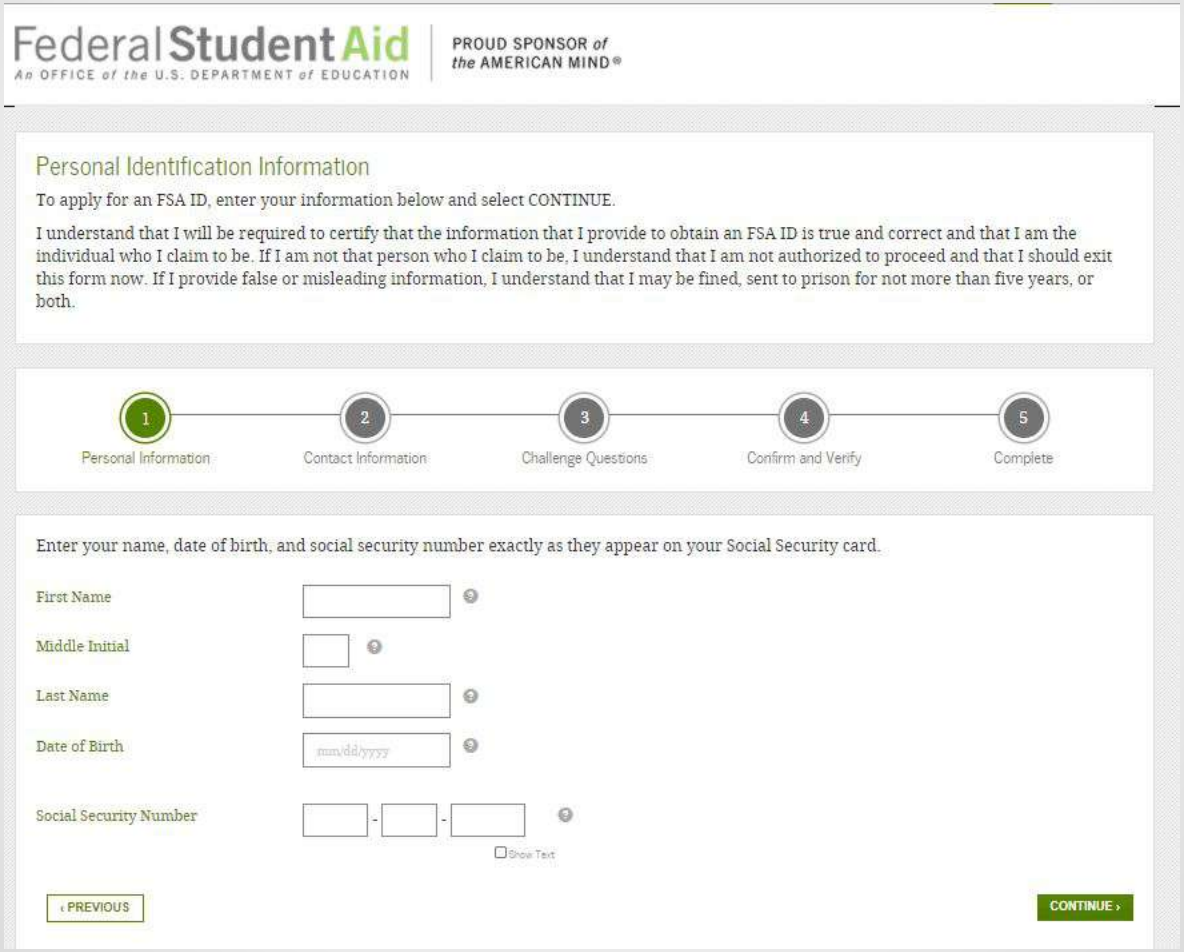
After verifying, the mobile phone number can be used as the username to login.



Create your FSA Account



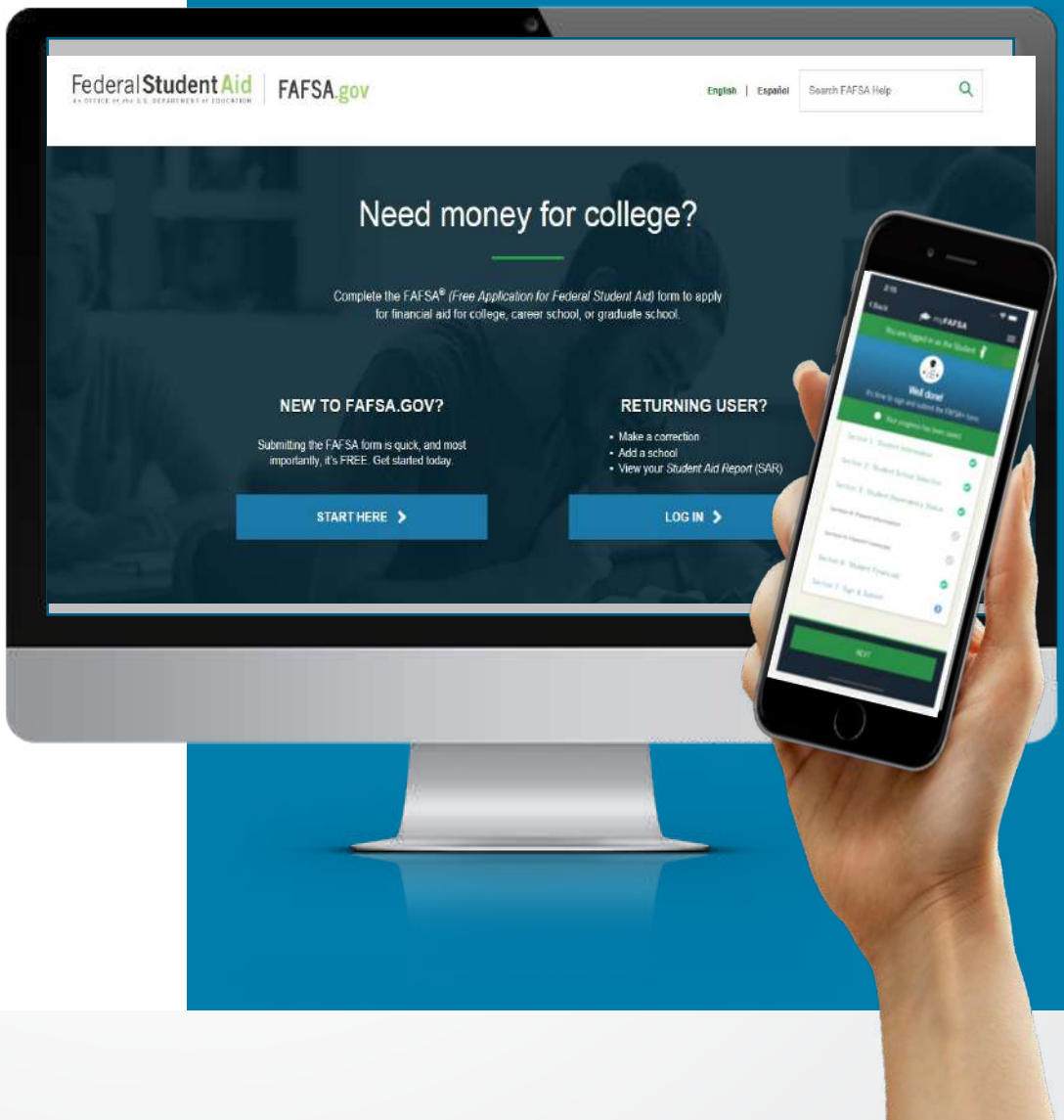
Create your FSA Account



StudentAid.gov/FAFSA

FAFSA

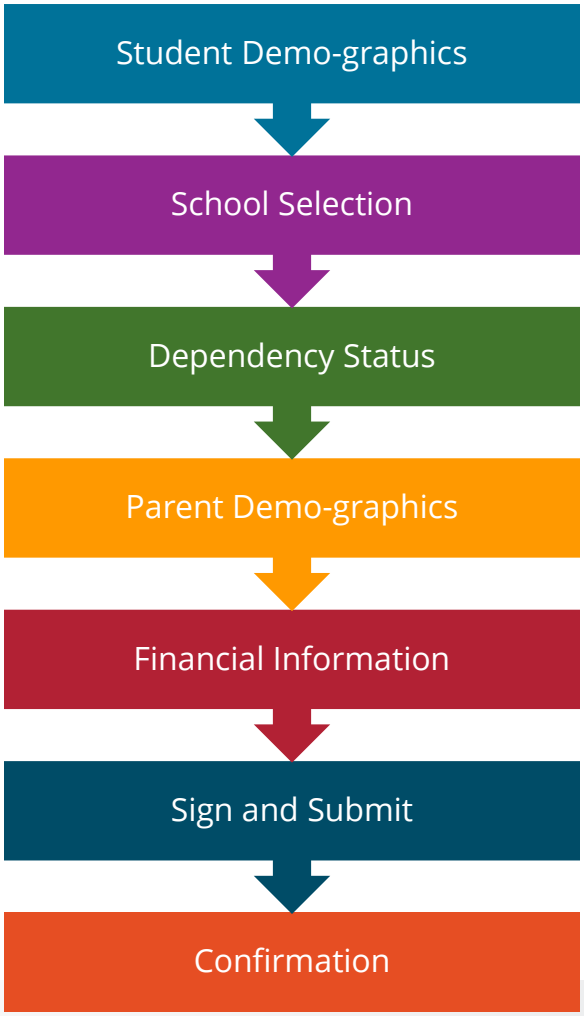
- Free Application for Federal Student Aid
- There is skip logic built into the FAFSA. If you answer questions a certain way, you are able to skip other questions. Anytime you are asked if you want to skip questions, say yes, you will not be penalized.
- Students must file a FAFSA every year they are enrolled in postsecondary education
- Apply online at: **studentaid.gov** or use the **myStudentAid** mobile app (USDE)



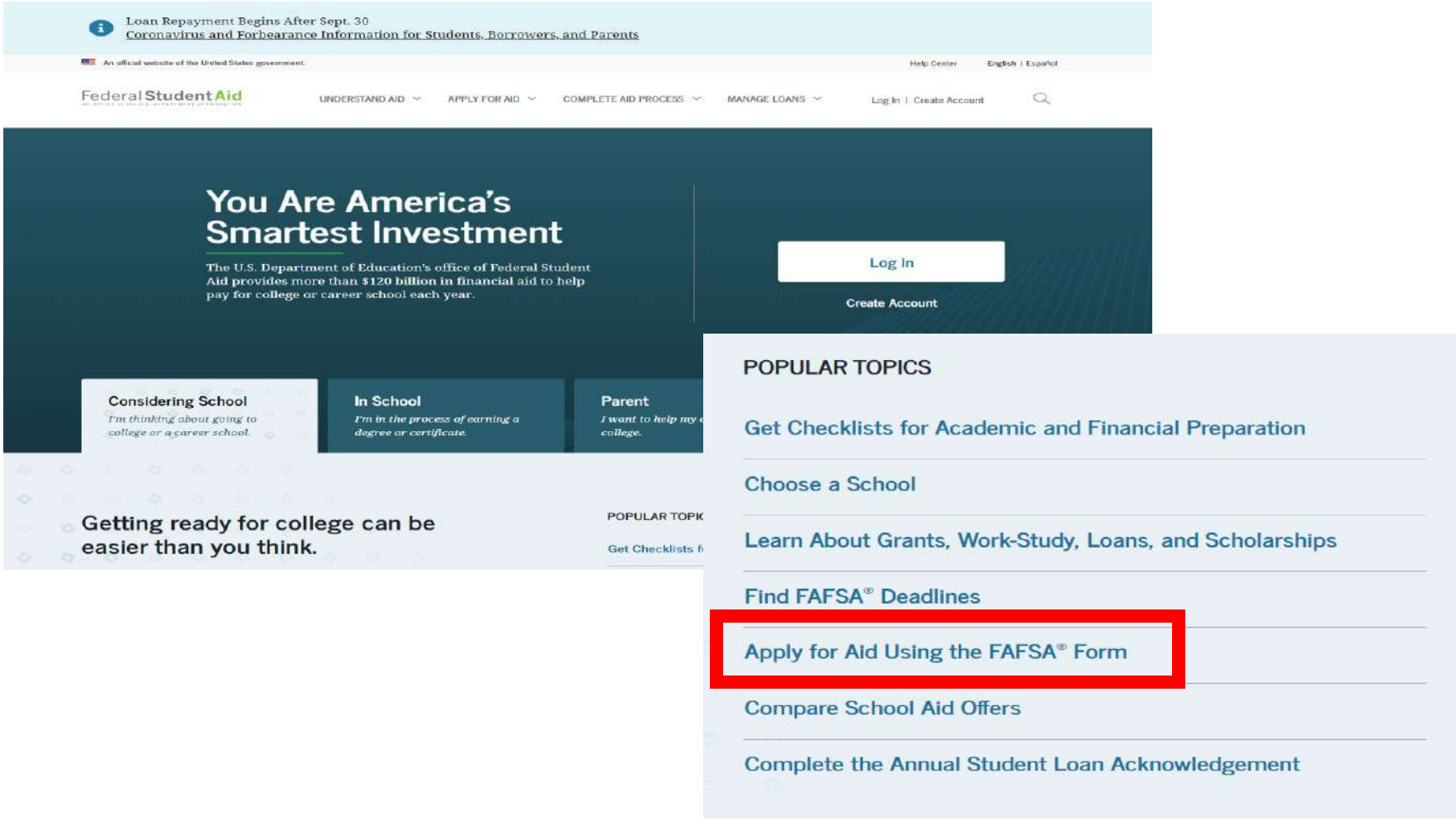
FAFSA Steps

1. Login – student or parent
2. Disclaimer – select

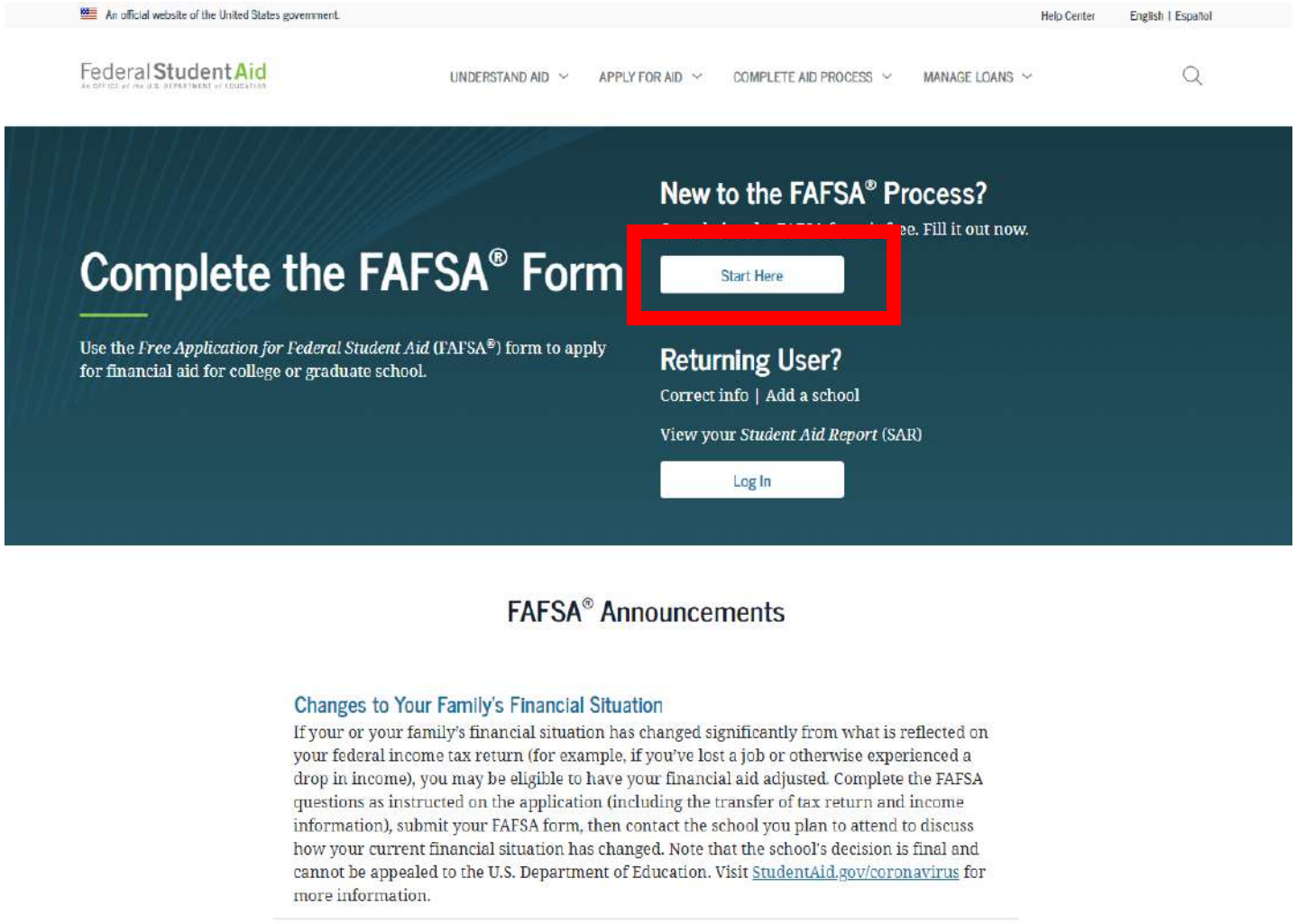
3. Application Year
4. Save Key
5. Introduction



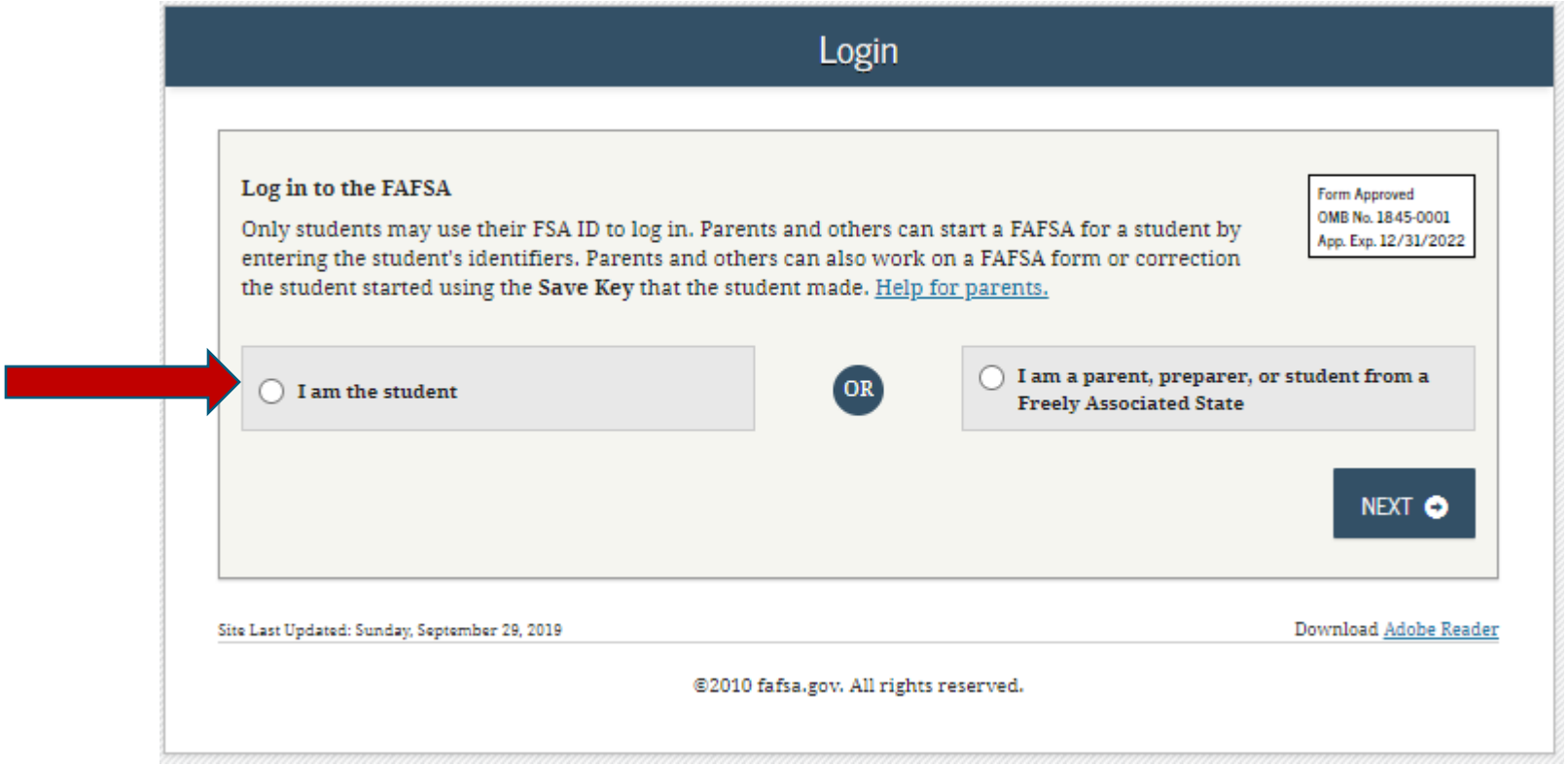
StudentAid.gov



FAFSA Application



Login


Login
Log in to the FAFSA
Only students may use their FSA ID to log in. Parents and others can start a FAFSA for a student by entering the student's identifiers. Parents and others can also work on a FAFSA form or correction the student started using the Save Key that the student made. Help for parents.
Form Approved
OMB No. 1845-0001
App. Exp. 12/31/2022
I am the student
OR
I am a parent, preparer, or student from a Freely Associated State
NEXT
Site Last Updated: Sunday, September 29, 2019
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Disclaimer

Warning

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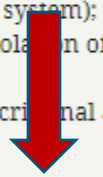
- Any access by an employee or agent of a commercial entity, or other third party, who is not the individual user, for purposes of commercial advantage or private financial gain (regardless of whether the commercial entity or third party is providing a service to an authorized user of the system); and
- Any access in furtherance of any criminal or tortious act in violation of the Constitution or laws of the United States or any state.
- If system monitoring reveals information indicating possible criminal activity, such evidence may be provided to law enforcement personnel.



DECLINE ACCEPT

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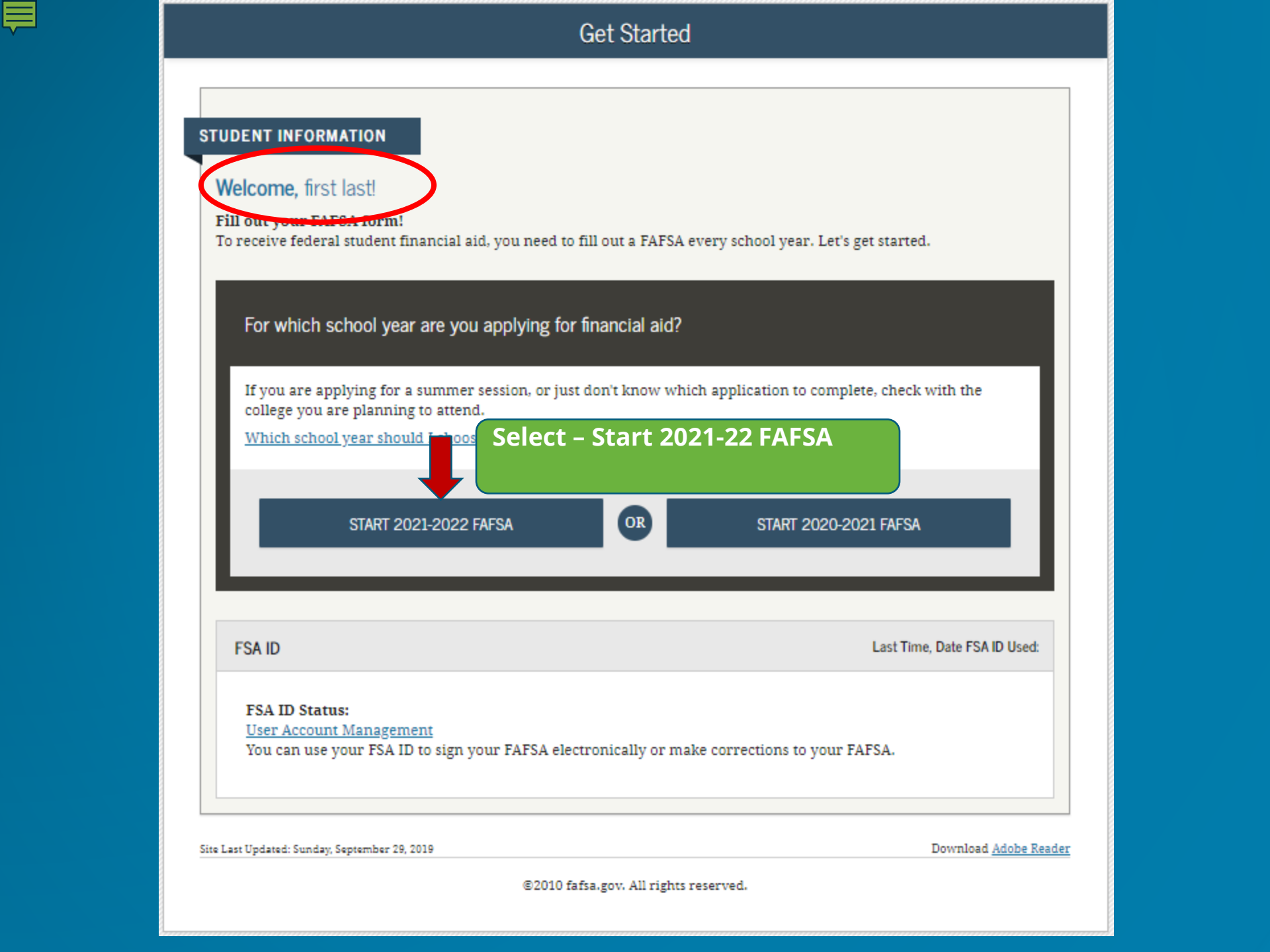
Get Started
STUDENT INFORMATION
Welcome, first last!
Fill out your FAFSA form!
To receive federal student financial aid, you need to fill out a FAFSA every school year. Let's get started.
For which school year are you applying for financial aid?
If you are applying for a summer session, or just don't know which application to complete, check with the college you are planning to attend.
Which school year should I choos
Select – Start 2021-22 FAFSA
START 2021-2022 FAFSA
OR
START 2020-2021 FAFSA
FSA ID
Last Time, Date FSA ID Used:
FSA ID Status:
User Account Management
You can use your FSA ID to sign your FAFSA electronically or make corrections to your FAFSA.
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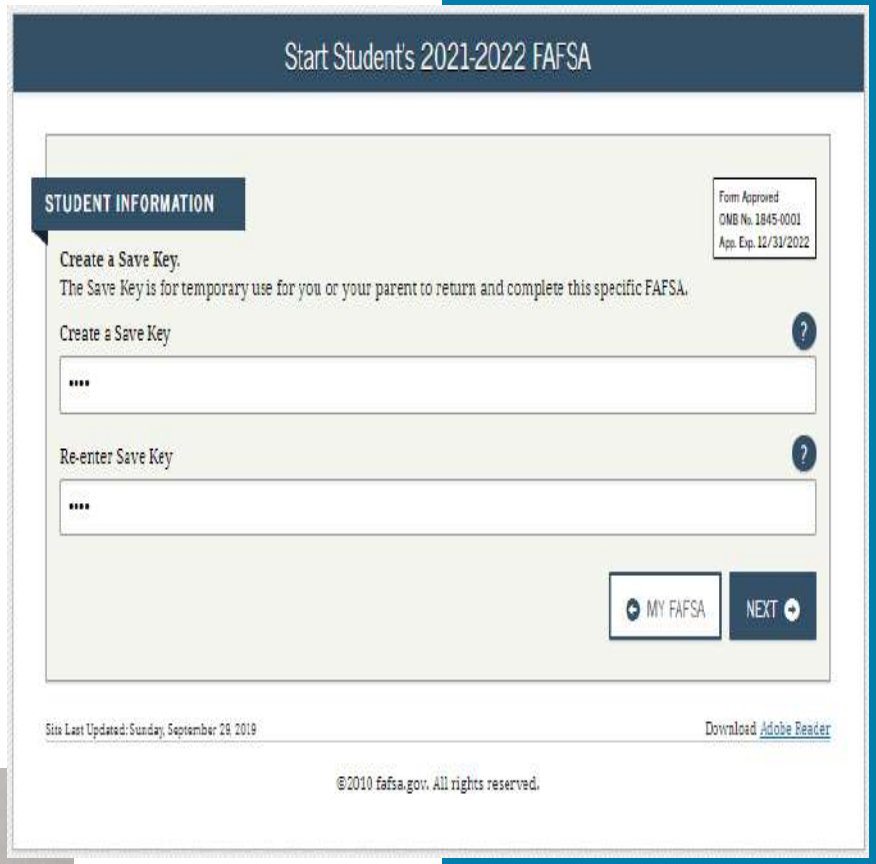
Write this down!



Create a Save Key

The save key must be 4 to 8 characters long & any combination of numbers and/or uppercase and lowercase letters

Introduction – 2021-2022 FAFSA

STUDENT INFORMATION

Expand All

How can I get help completing my FAFSA?

Get help with each FAFSA question by clicking on the Help (?) icon. You can also search FAFSA Help or view the FAFSA Help page.

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

NEXT

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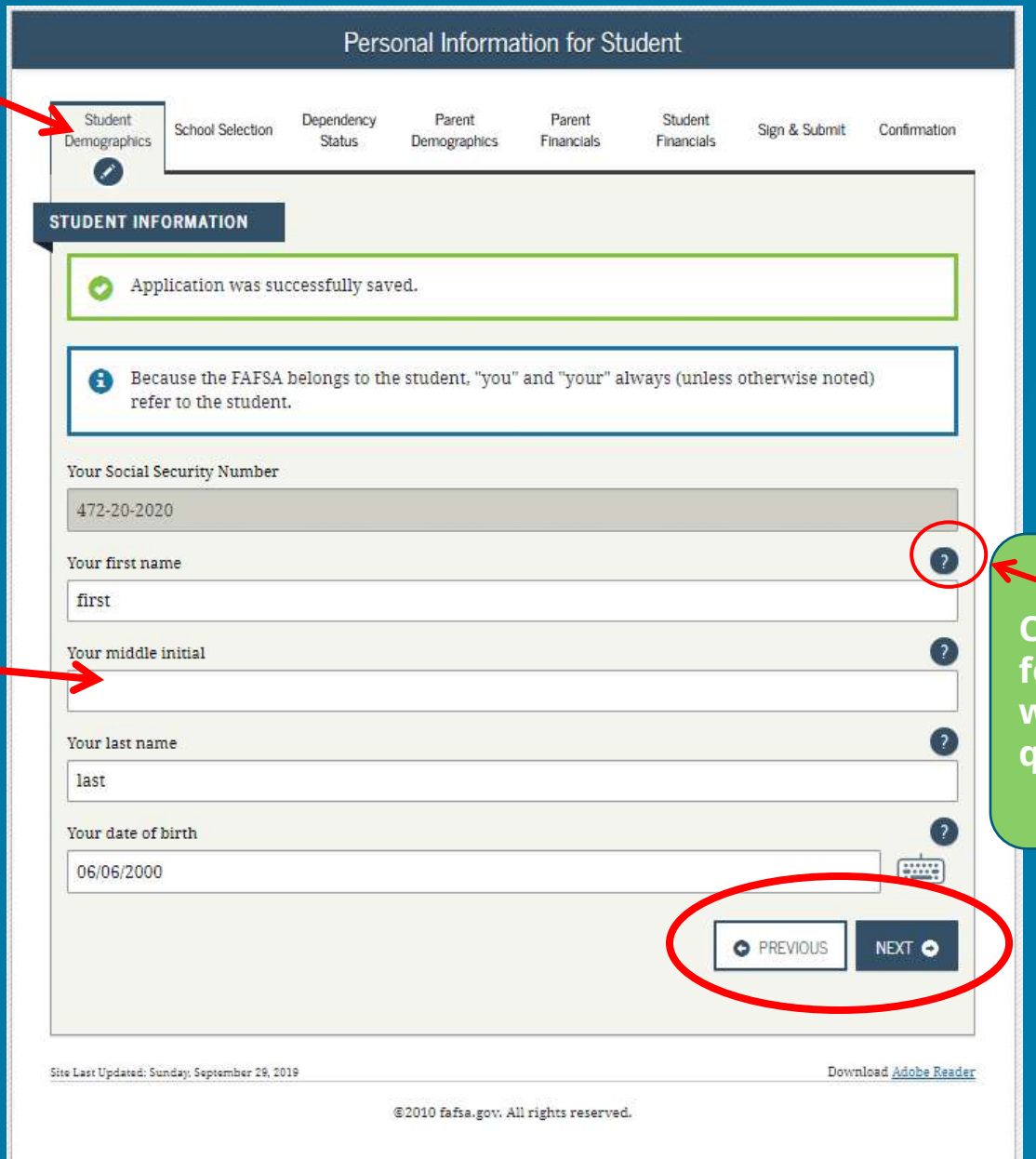
Student Demographics

The navigation bar tells you where you are in the application.

Review student demographic information. Add middle initial.

Click Next

Use the Previous and Next buttons within the application.



Click ? for help with the question

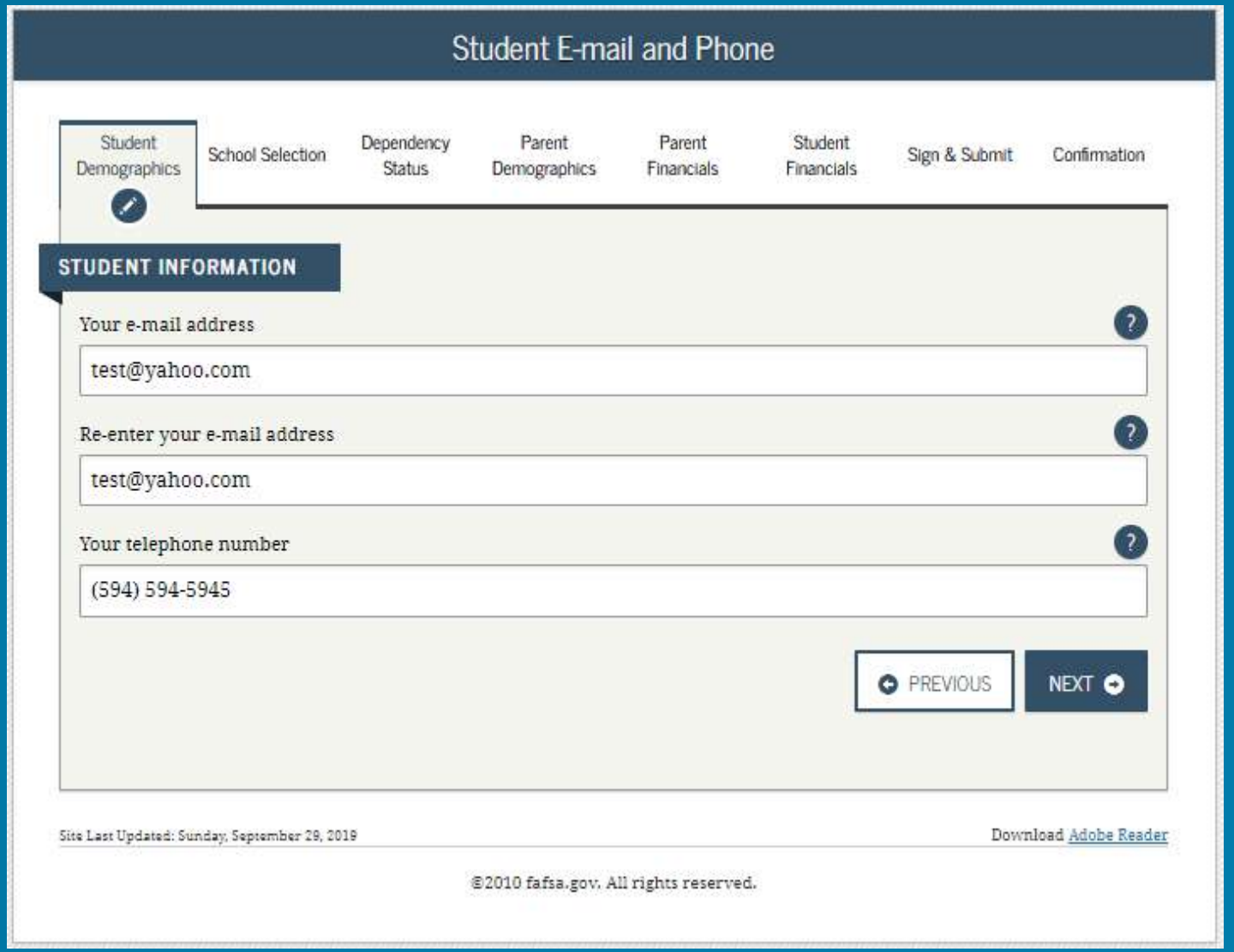
Student Demographics

Confirm email address & add telephone number

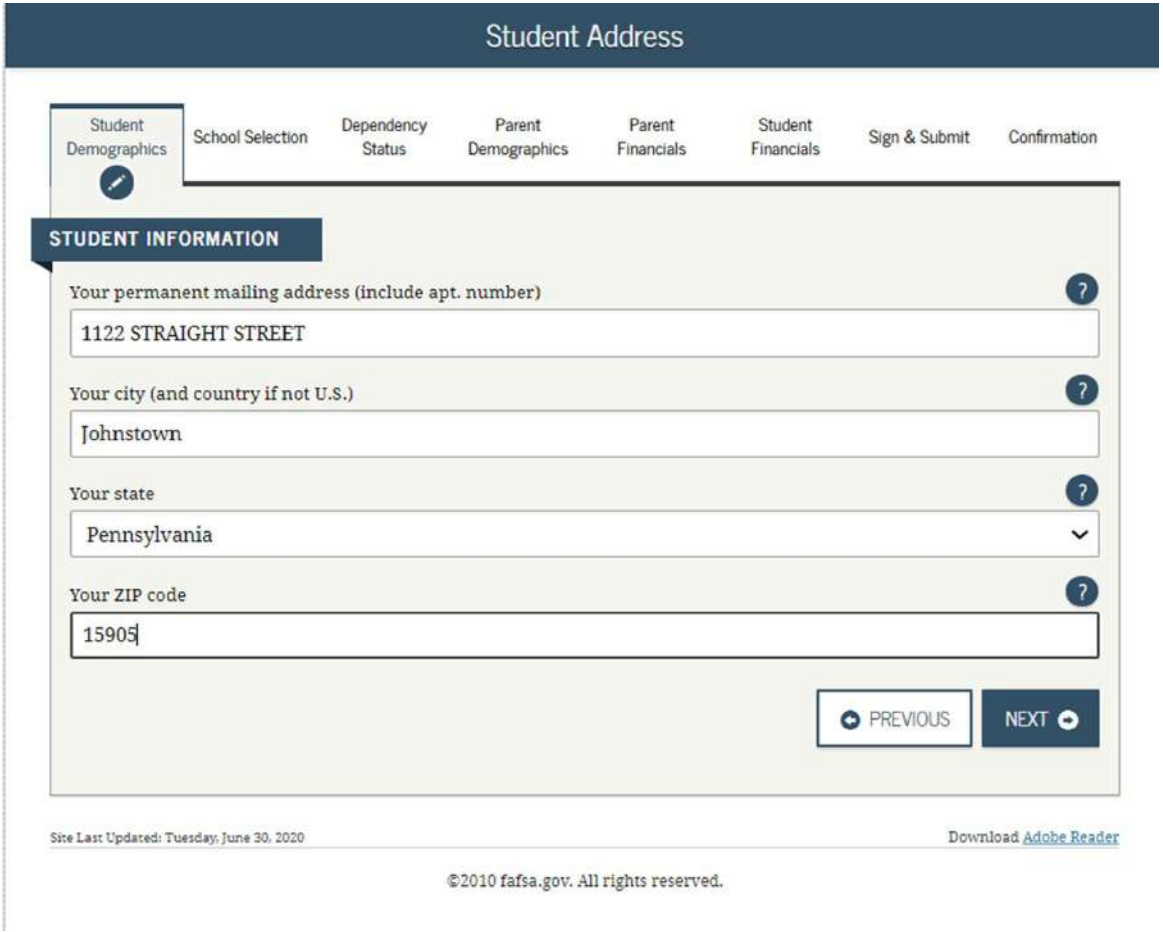
Use an email address you will check every day!

Tip:
Don't use your high school email address.

Click Next



Student Demographics



Confirm the student's mailing address

Click Next

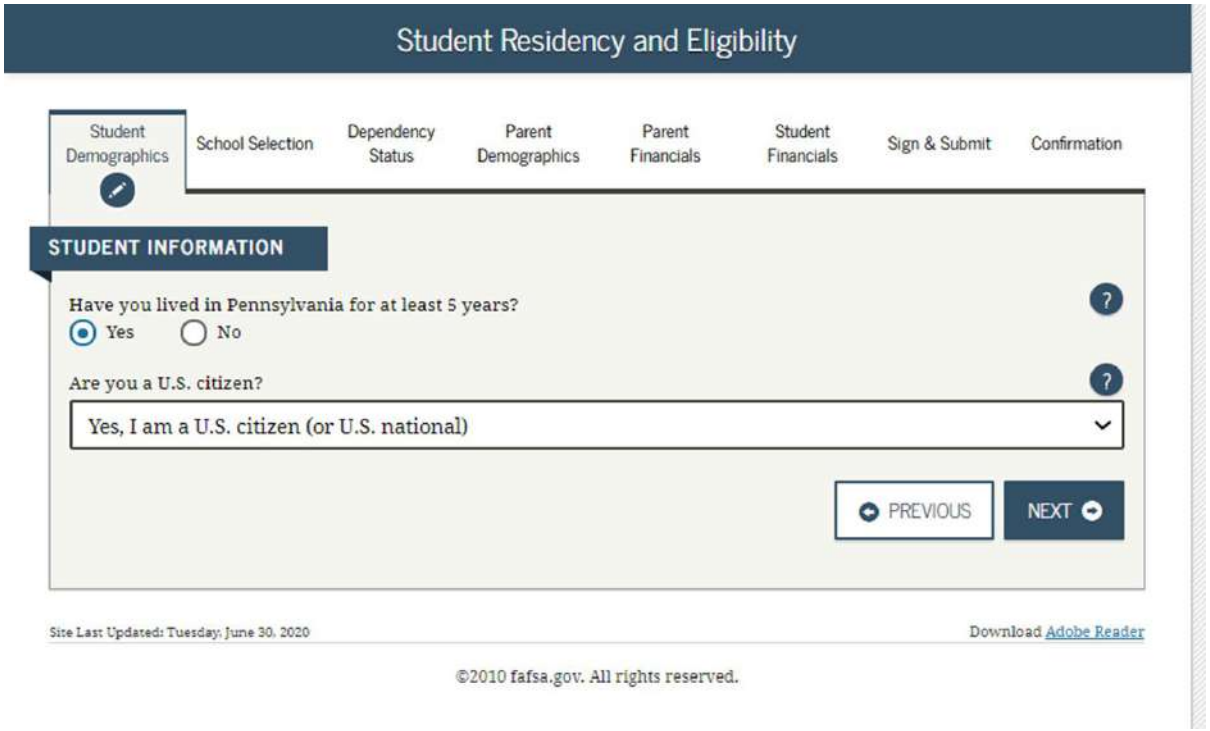
Student Demographics

Confirm residency –

Has the student lived in PA for at least 5 years?

Indicate Citizenship status - (US citizen, Eligible non-citizen or not a citizen or eligible non-citizen).

Click Next

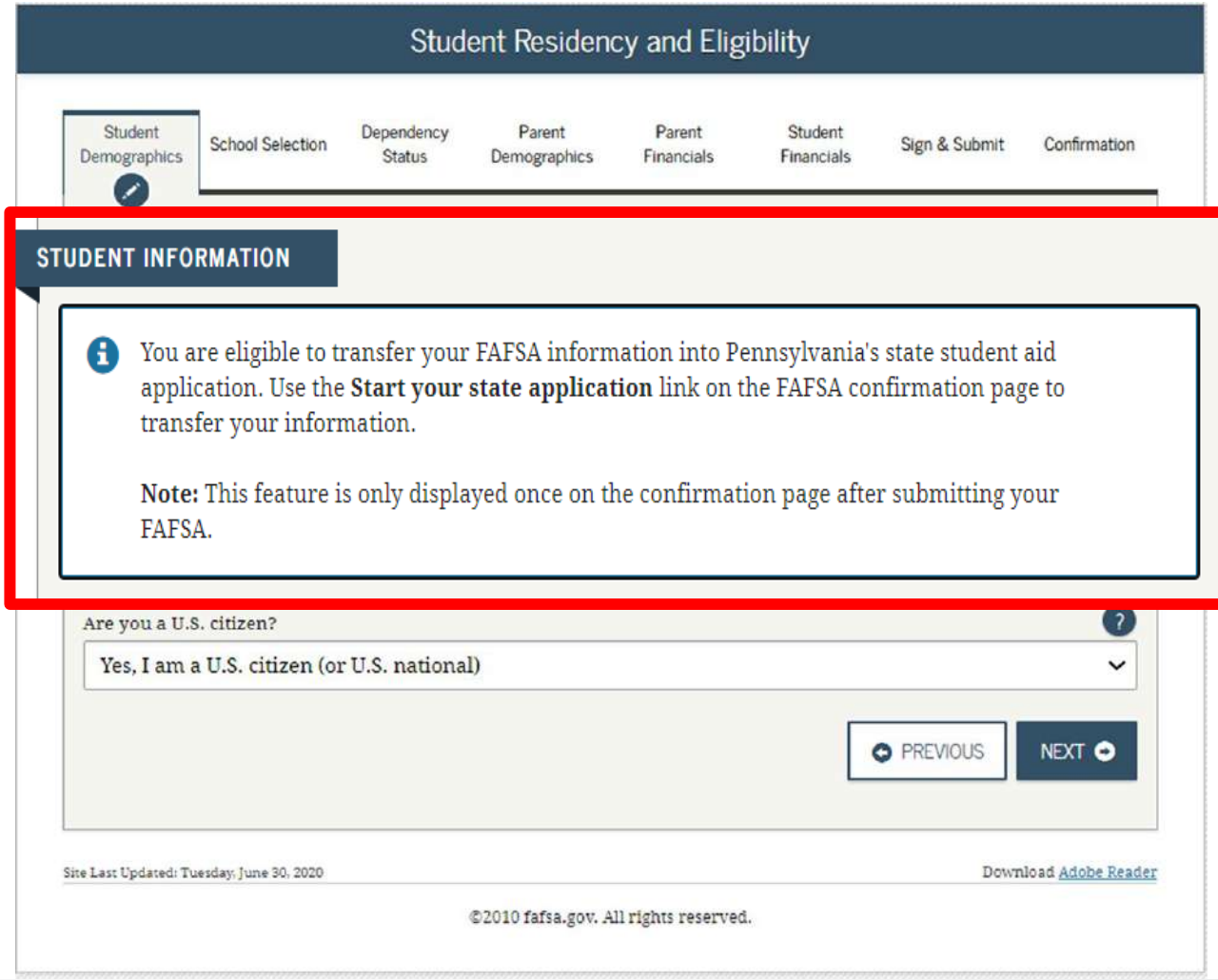


Student Demographics

You will be reminded to start your PA State Grant Application

From the FAFSA Confirmation Page.

Click Next



Student Demographics

Confirm HS completion status

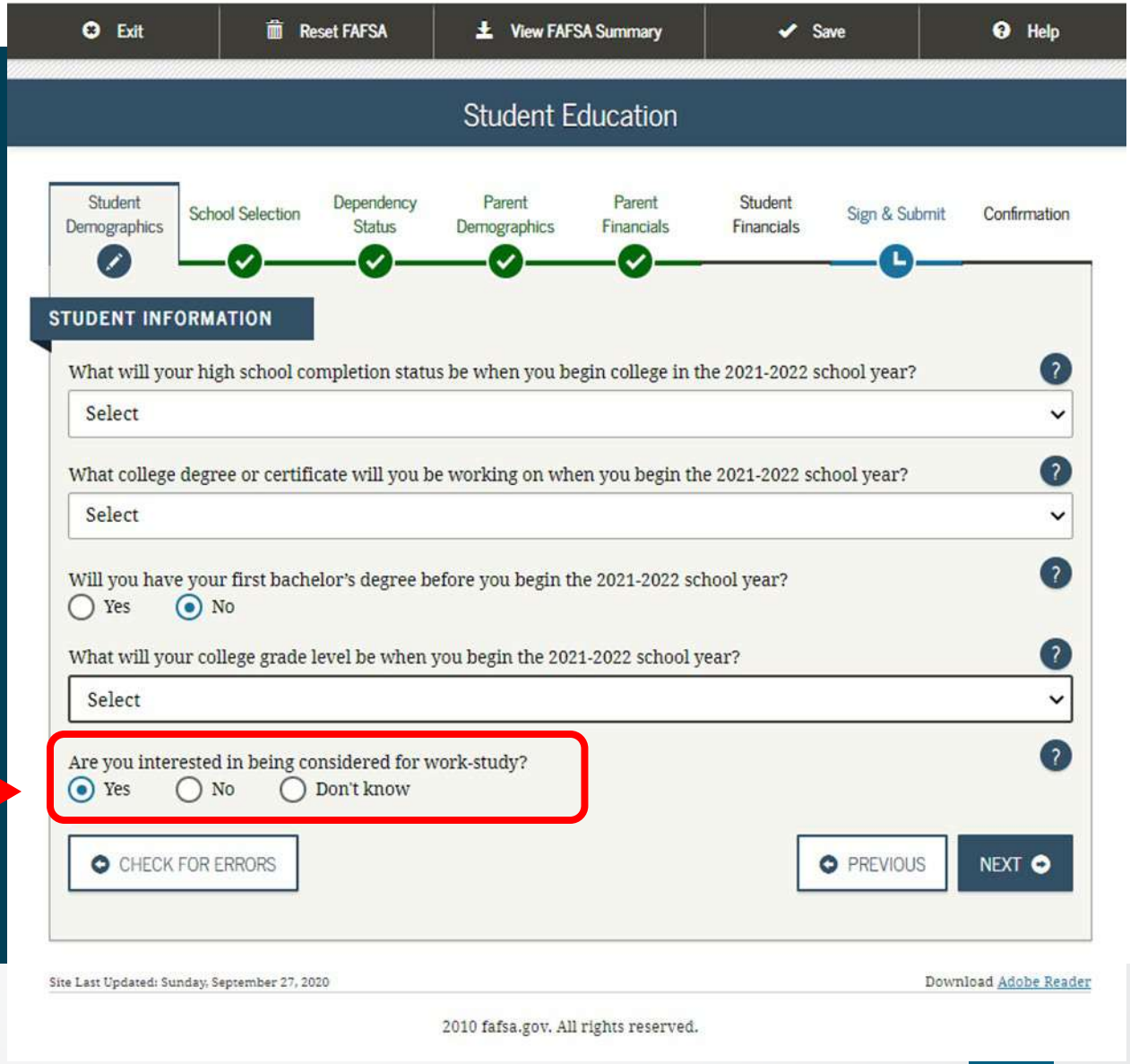
What degree will student be working on?

Will the student have a BA degree before 2021-22 school year?

What will be student's college grade level be in 2021-22?

Answer Work Study question

Click Next



Student Demographics

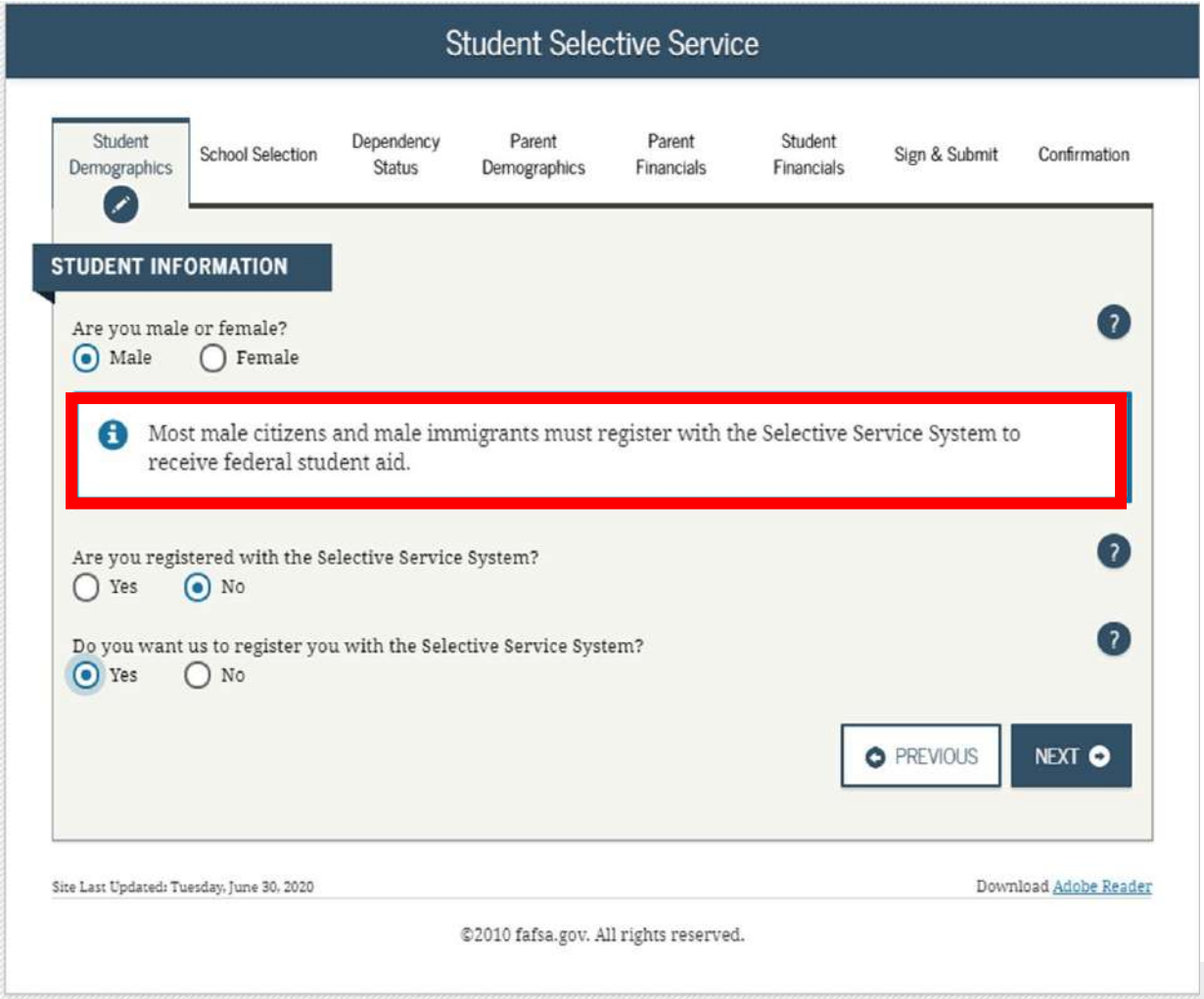
Answer the gender question (gender at birth).

Male students will get the Selective Service questions.

All males who are US citizens are required to register with SS when they turn 18.

(www.sss.gov)

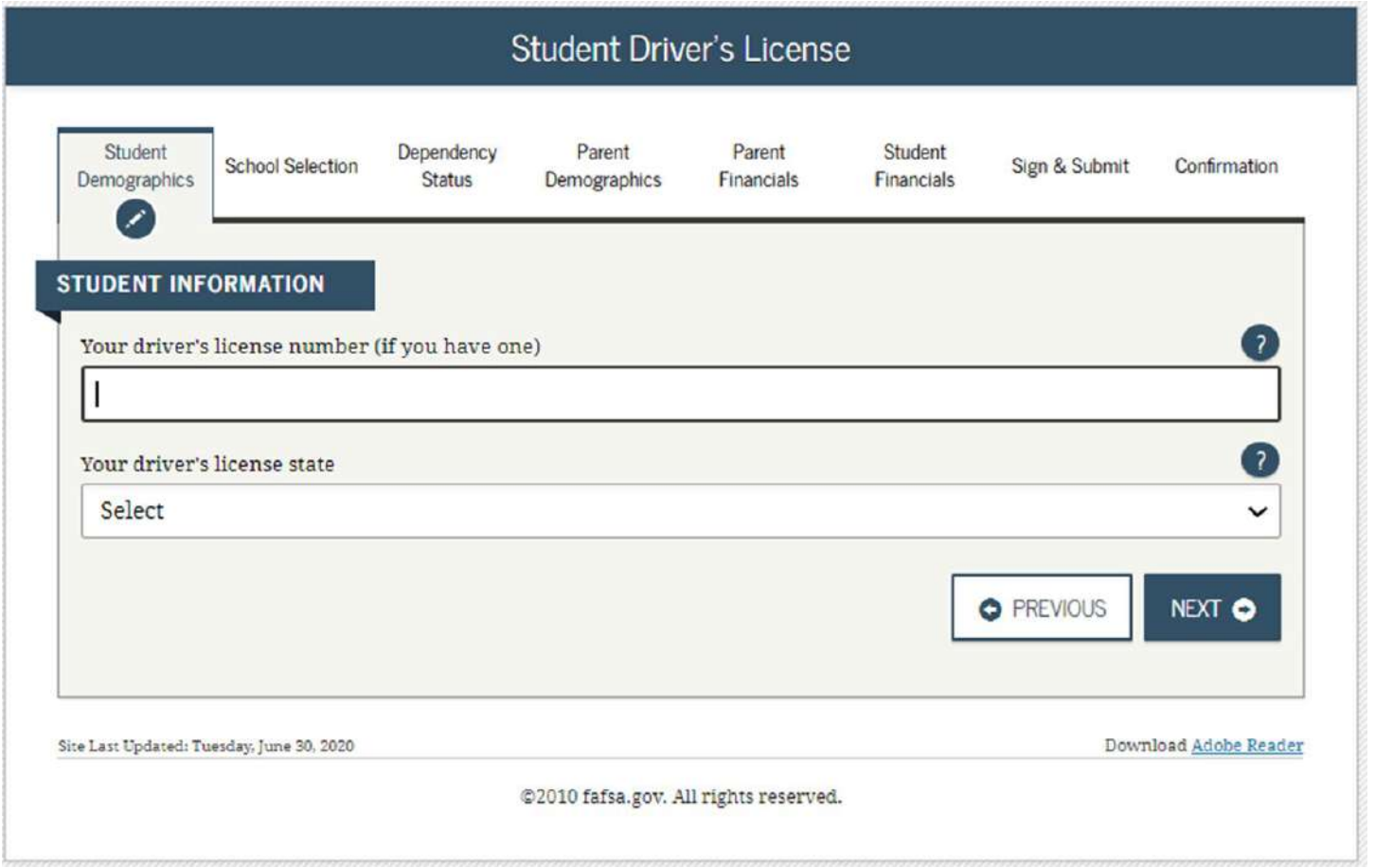
Click Next



Student Demographics

Enter student's Driver's License number and state (optional)

Click Next

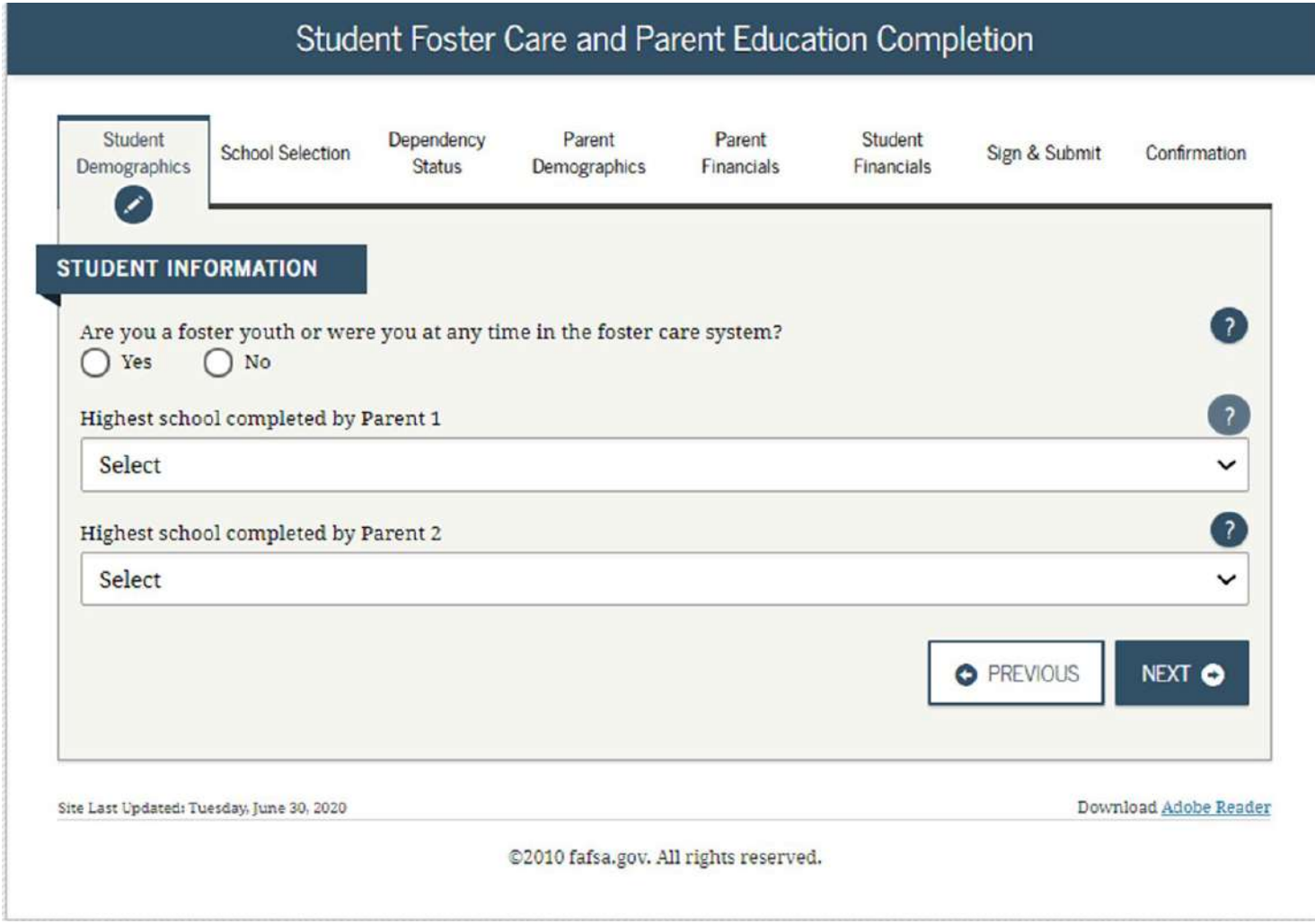


Student Demographics

Are/were you in Foster Care?

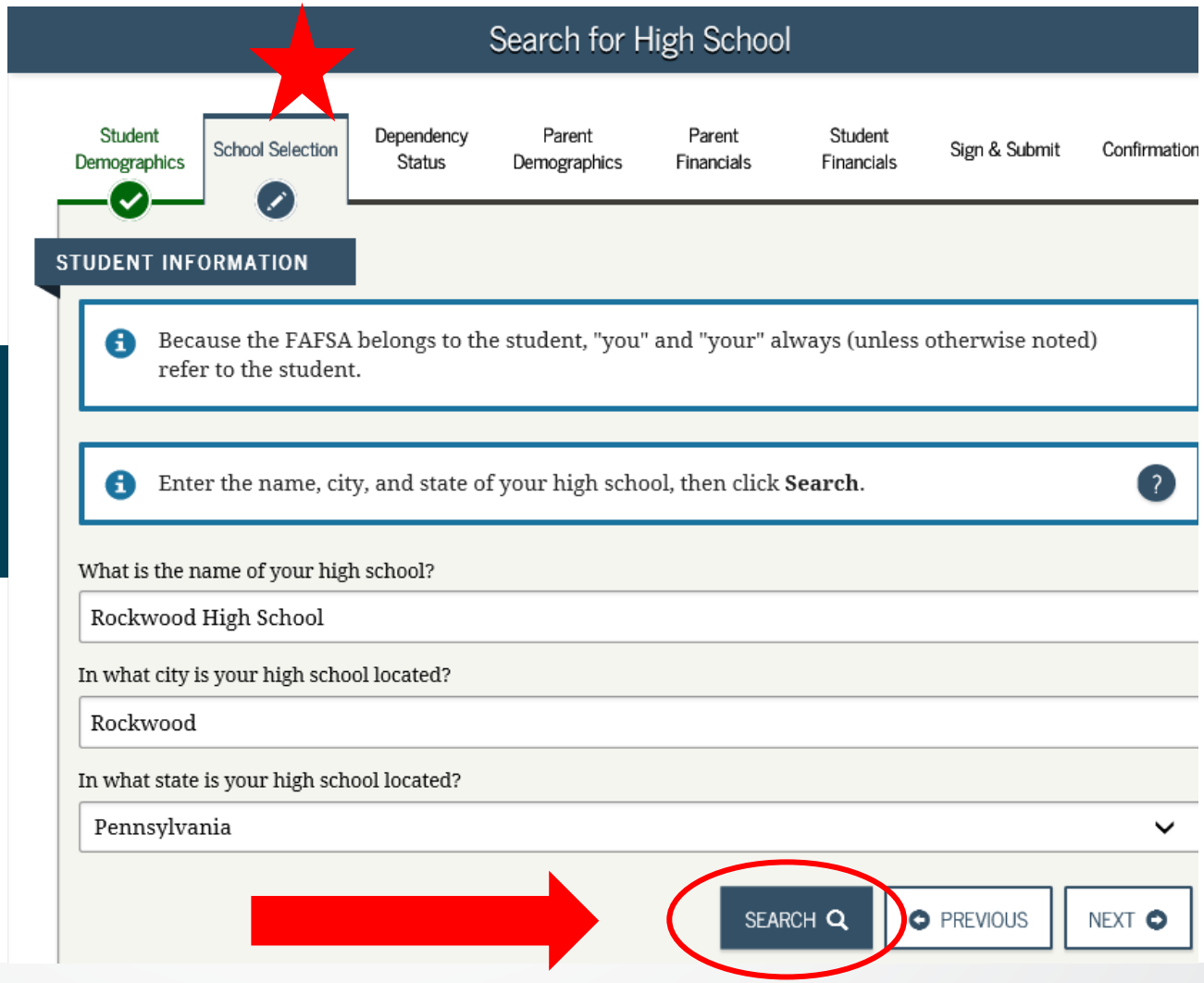
Select the answer that best describes your parent's (birth or adoptive parent) highest level of education completed.

Click Next



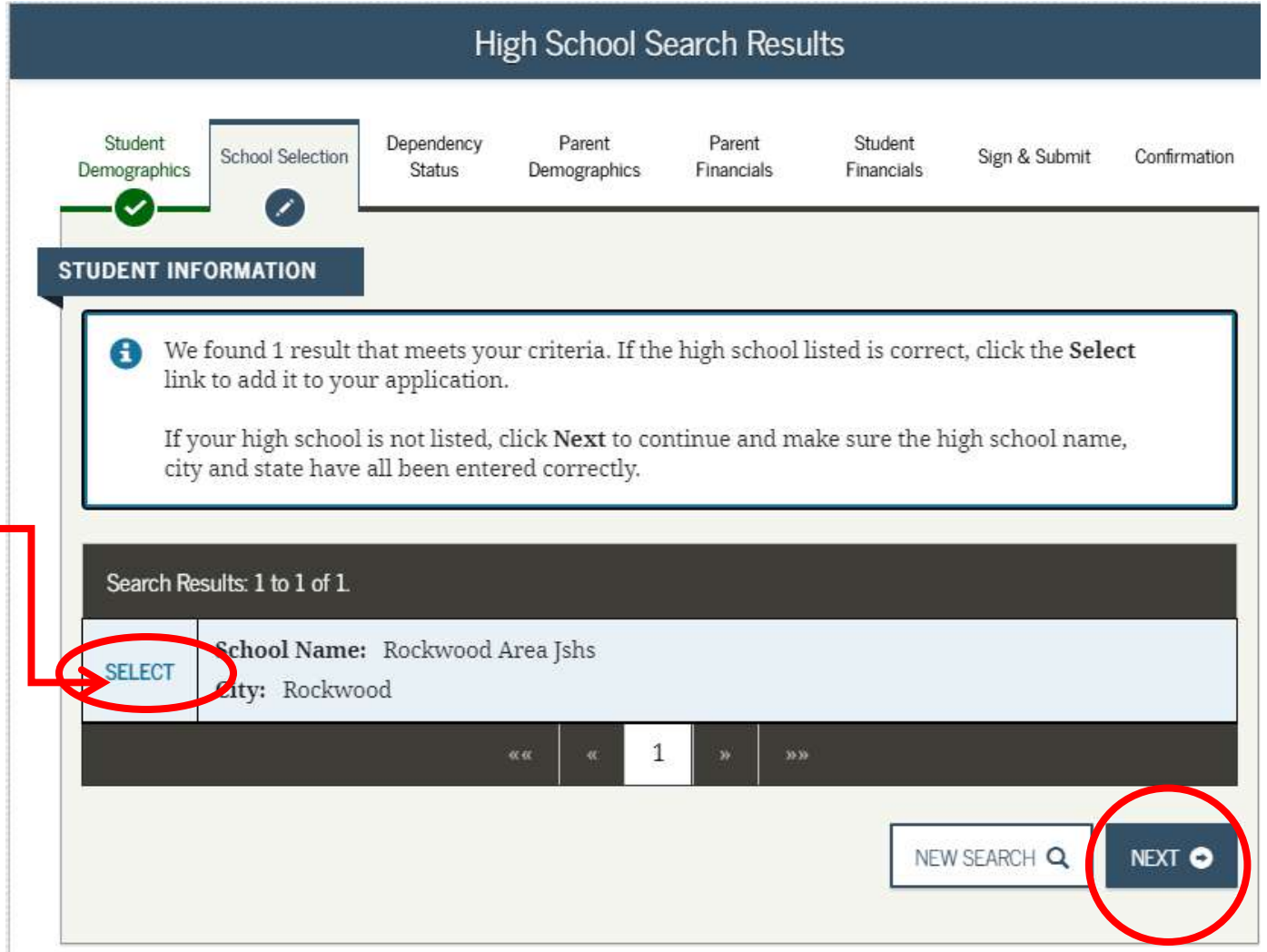
School Selection

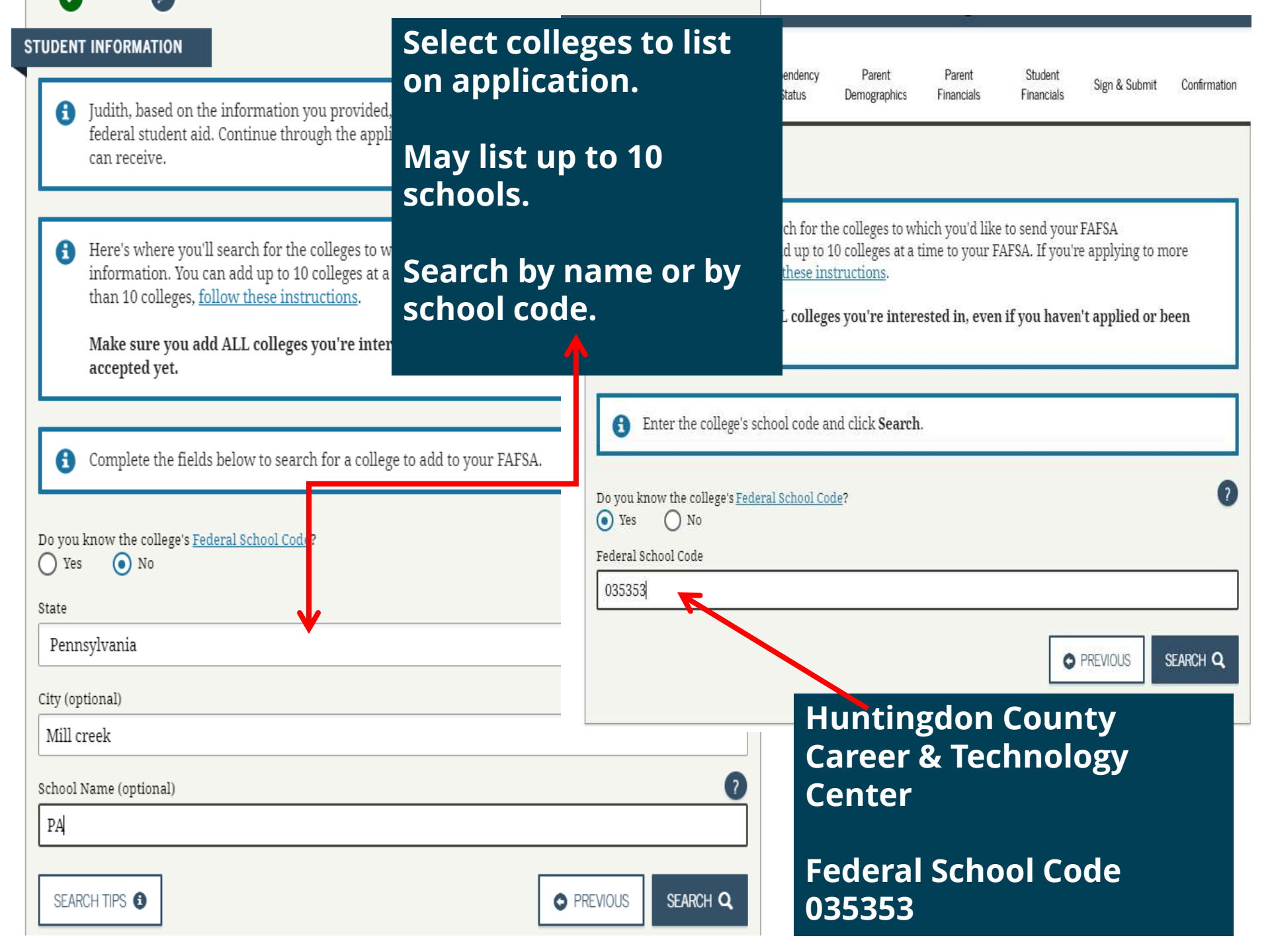
Enter name, city and state of your High School and then click *SEARCH*



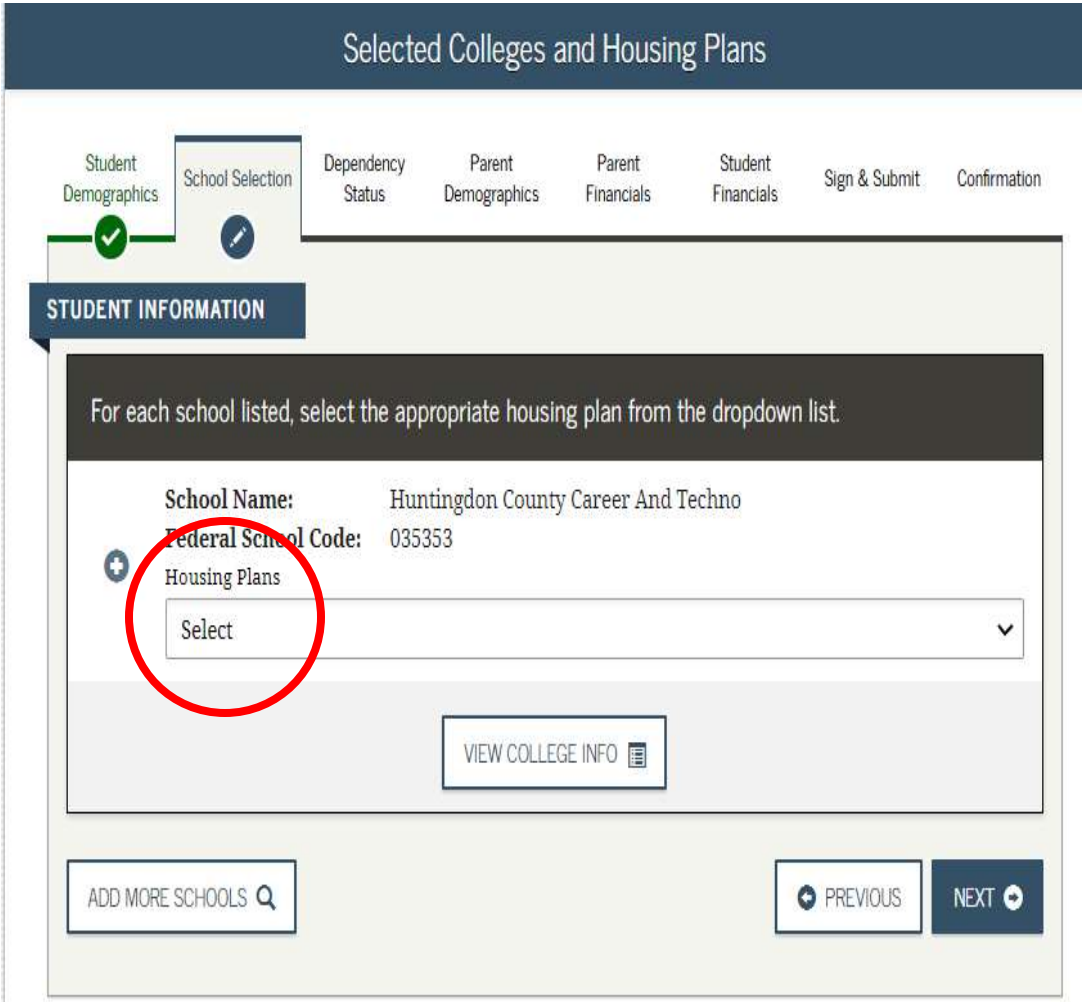
School Selection

Click Select and then Next




STUDENT INFORMATION
Judith, based on the information you provided,
federal student aid. Continue through the appli
can receive.
Here's where you'll search for the colleges to w
information. You can add up to 10 colleges at a
than 10 colleges, follow these instructions.
Make sure you add ALL colleges you're inter
accepted yet.
Complete the fields below to search for a college to add to your FAFSA.
Do you know the college's Federal School Code?
Yes
No
State
Pennsylvania
City (optional)
Mill creek
School Name (optional)
PA
SEARCH TIPS
PREVIOUS
SEARCH
Select colleges to list on application.
May list up to 10 schools.
Search by name or by school code.
endency Status
Parent Demographics
Parent Financials
Student Financials
Sign & Submit
Confirmation
ch for the colleges to which you'd like to send your FAFSA
d up to 10 colleges at a time to your FAFSA. If you're applying to more
these instructions.
L colleges you're interested in, even if you haven't applied or been
Enter the college's school code and click Search.
Do you know the college's Federal School Code?
Yes
No
Federal School Code
035353
PREVIOUS
SEARCH
Huntingdon County Career & Technology Center
Federal School Code 035353

School Selection



Once the student adds all of his/her schools, they have to select housing.

Choices are;

- **on campus**
- **off campus**
- **with parent.**

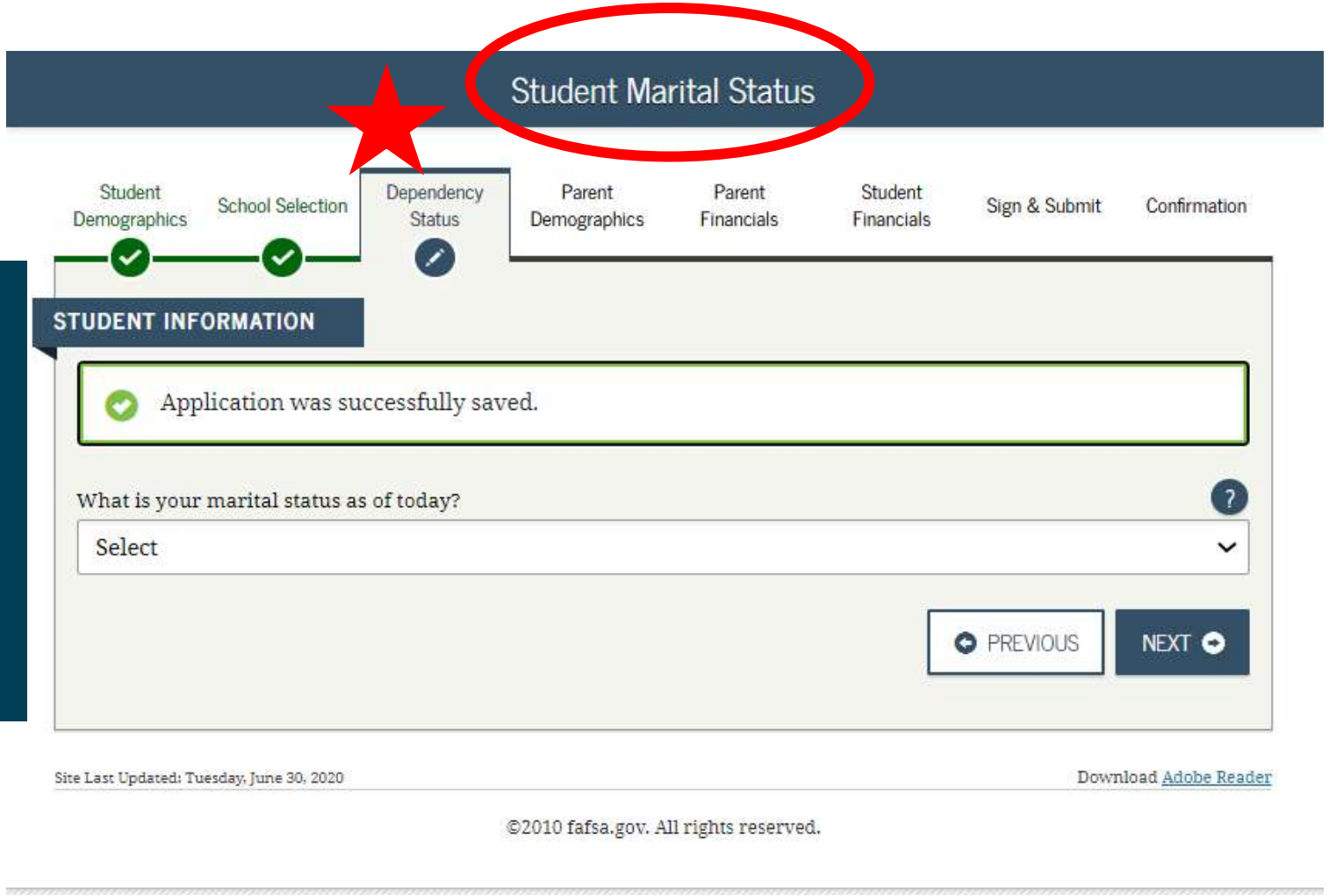
Click Next

Dependency Status

Confirm the marital status of the student.

- **Single**
- **Married/Remarried**
- **Separated**
- **Divorced/widowed**

Click Next

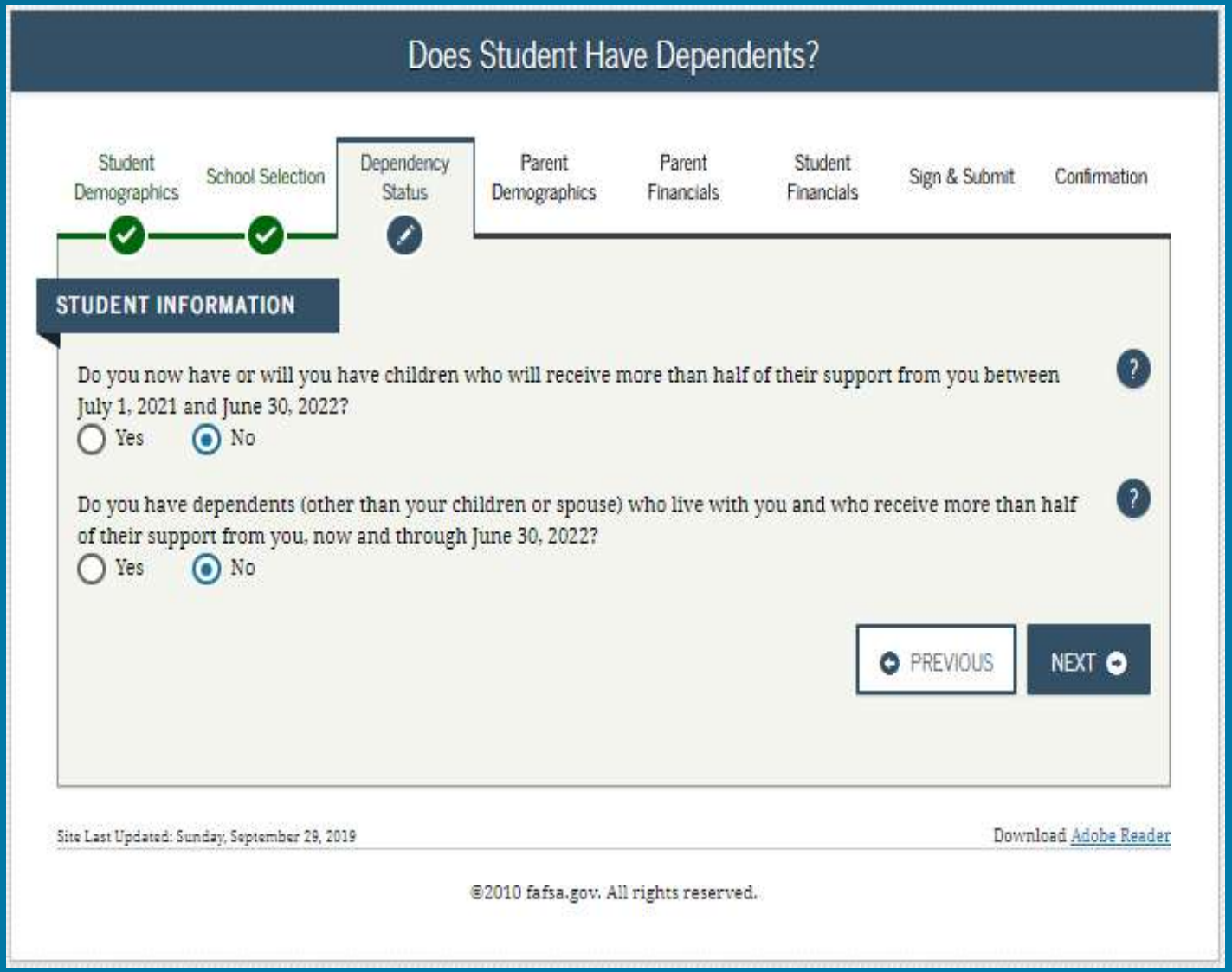


Dependency Status

Dependency Question

Answer as they apply to the student.

Click Next



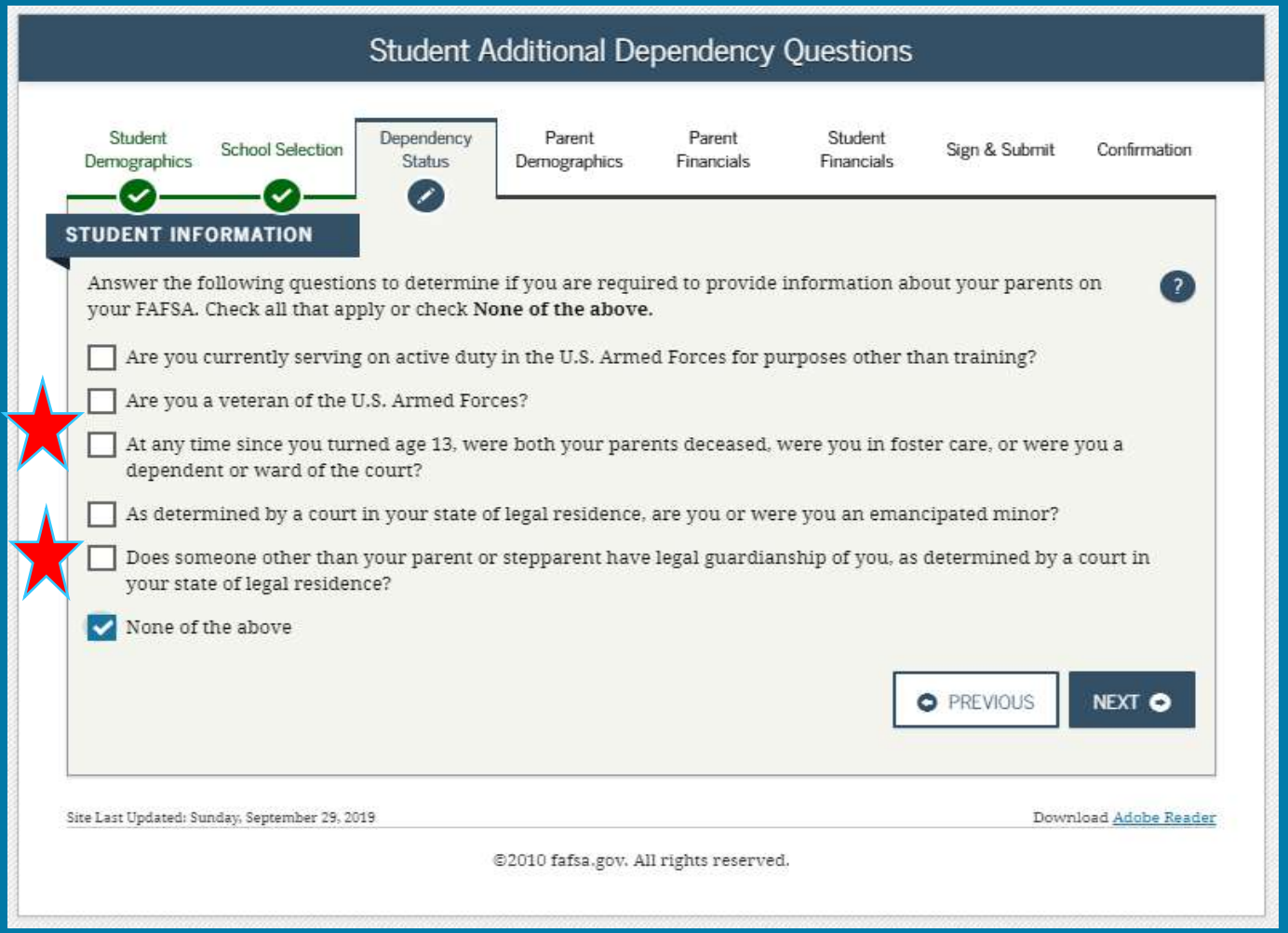
Dependency Status *continued……*

Student Additional Dependency Questions

Answer the questions

Review these

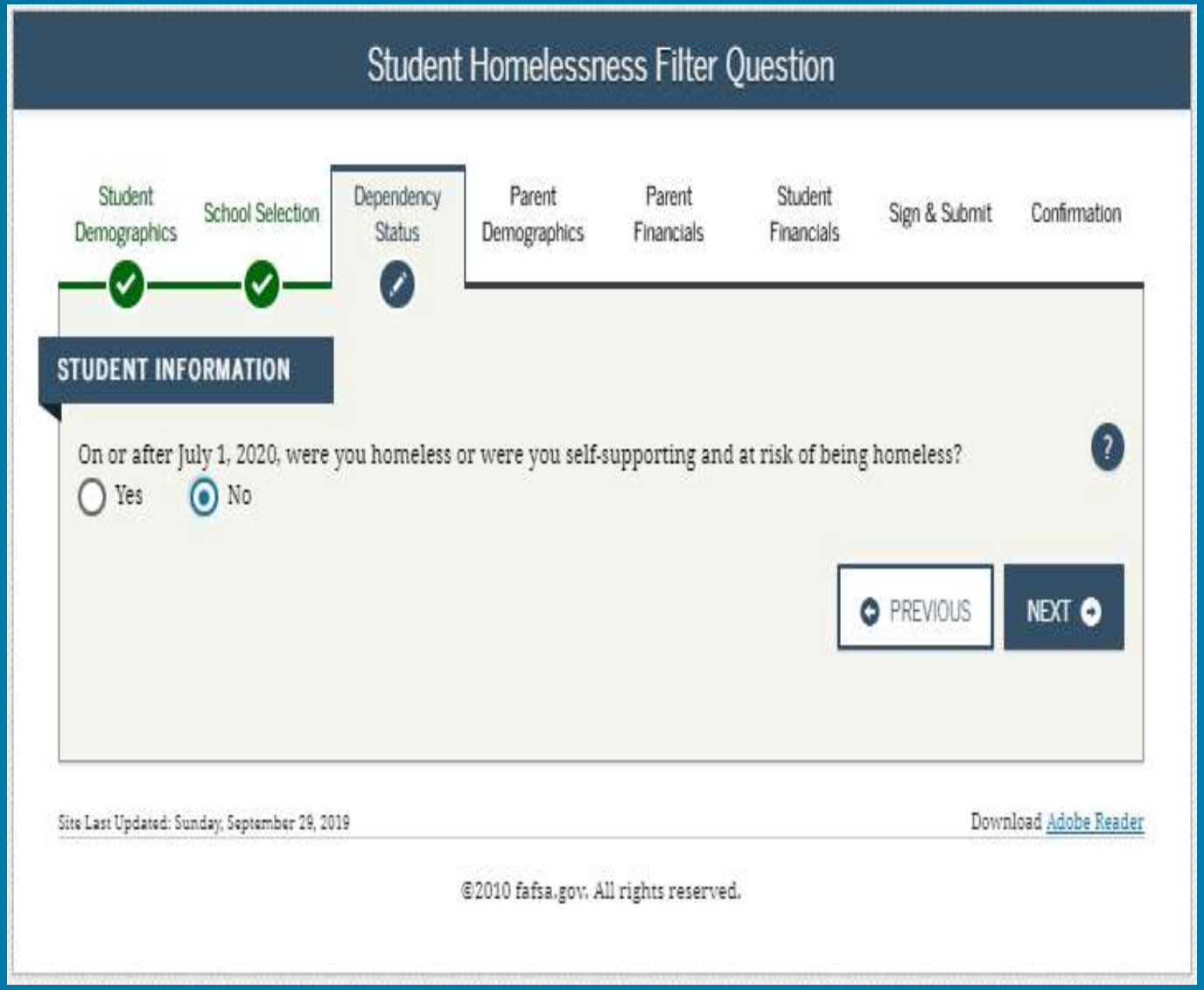
Click Next



Dependency Status *continued…..*

Student Homelessness Status

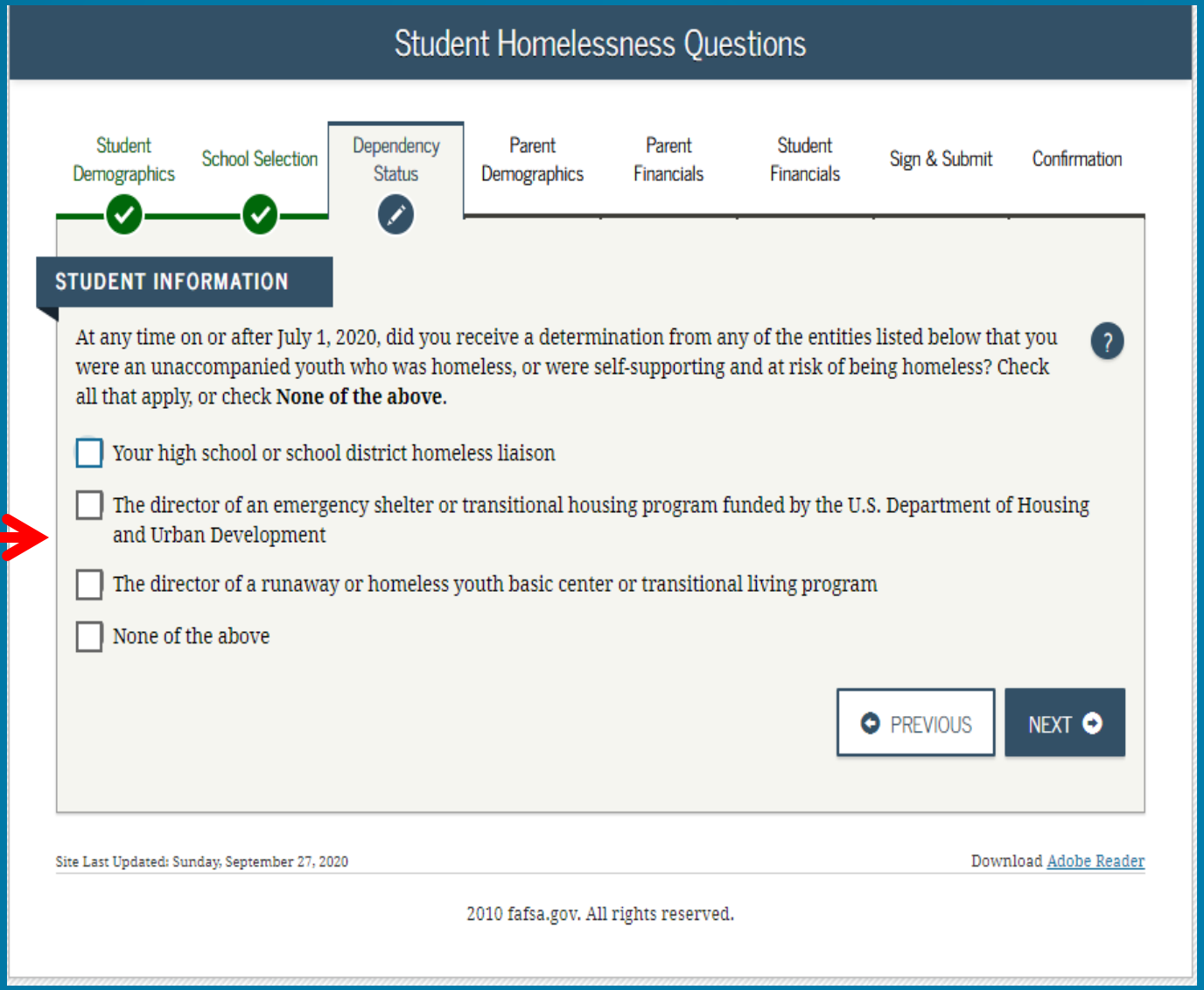
Click Next



Dependency Status *continued…..*

If you answer *yes* to homelessness question, check all that apply

Click Next

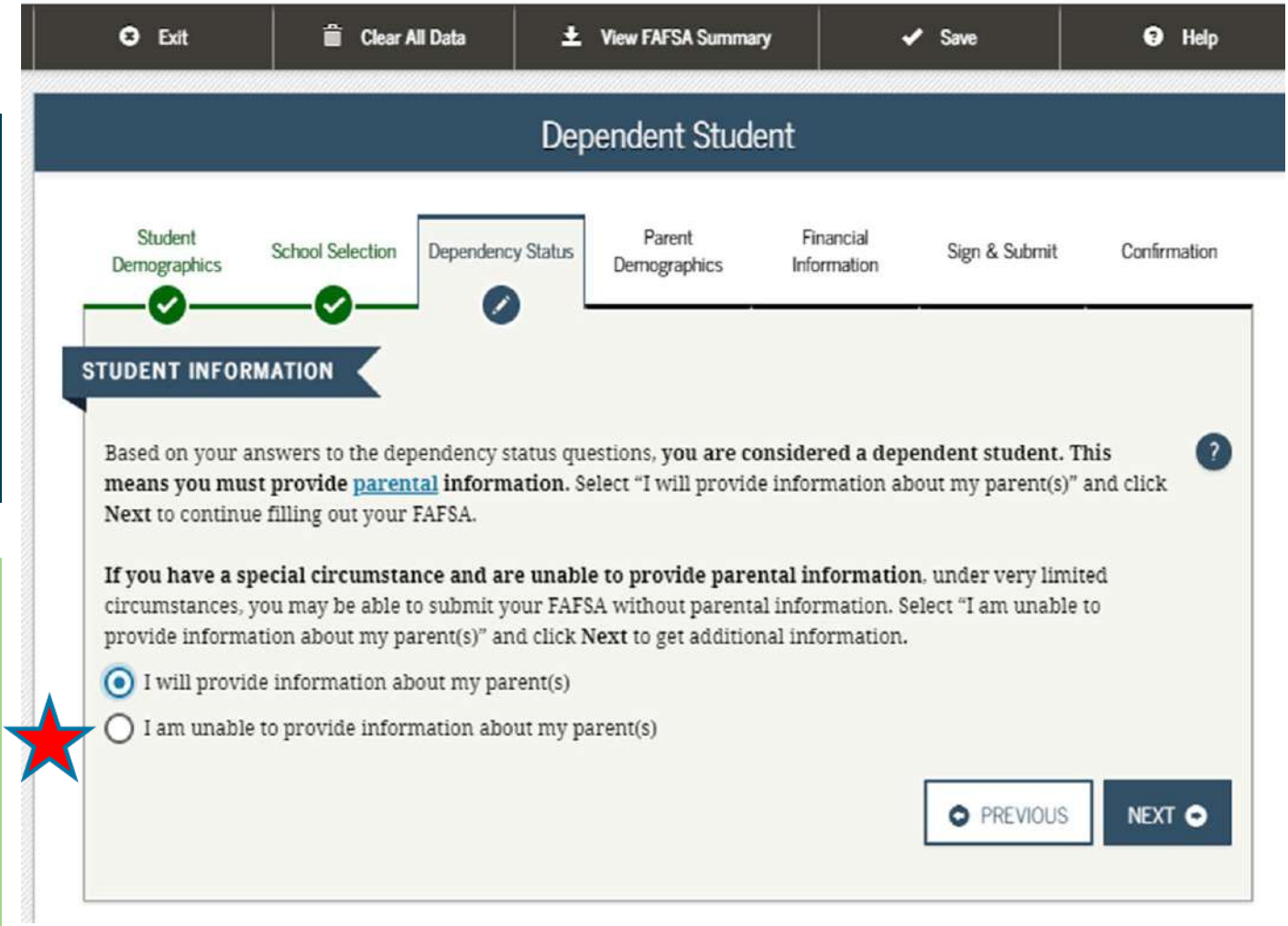


Dependency Status

Dependency determination

Click you will provide parent information and then Next.

The only time a dependent student says they will not provide parent information is if they have extenuating circumstances . The student should submit the FAFSA and then file an appeal with his/her school and PHEAA.

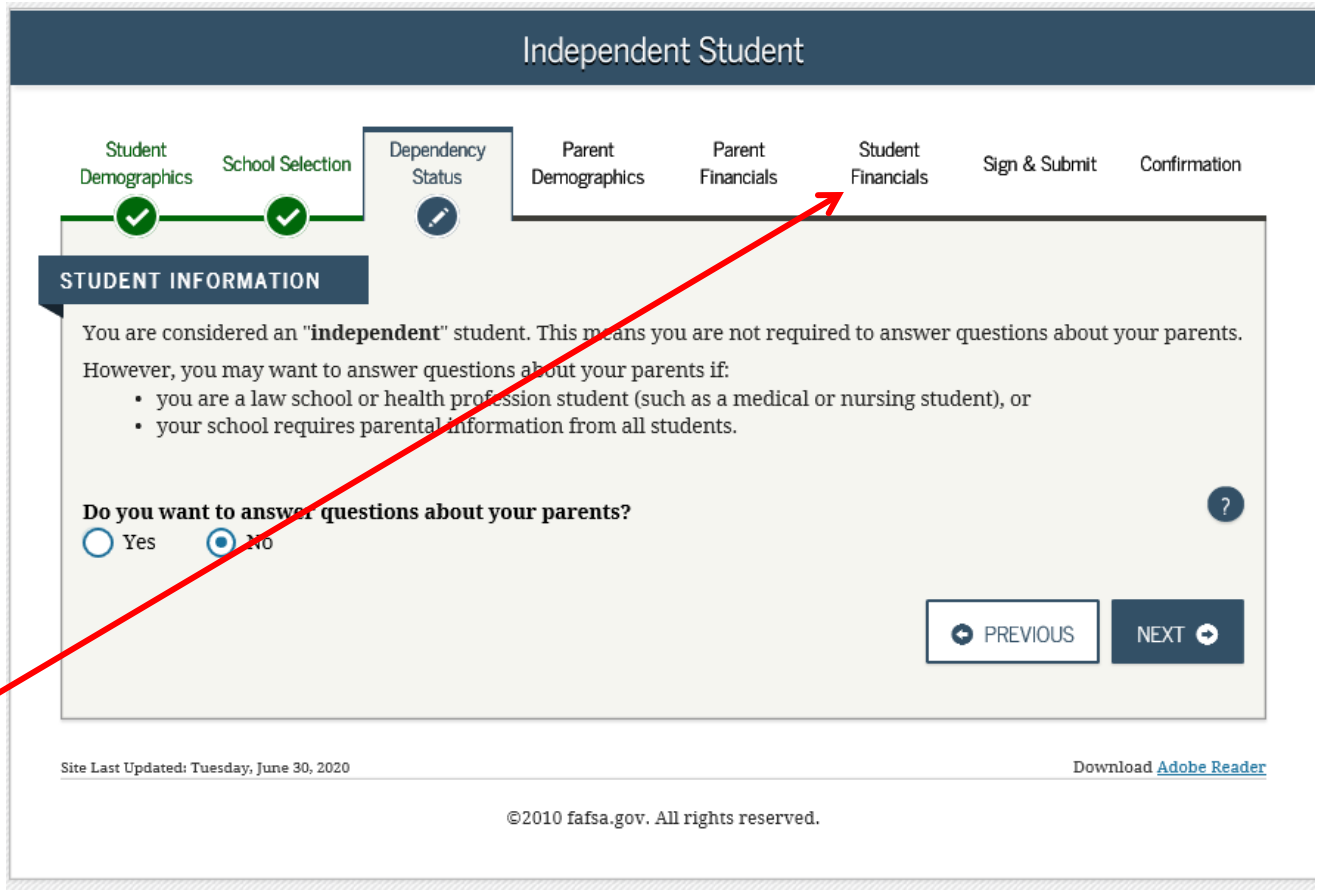


Dependency Status

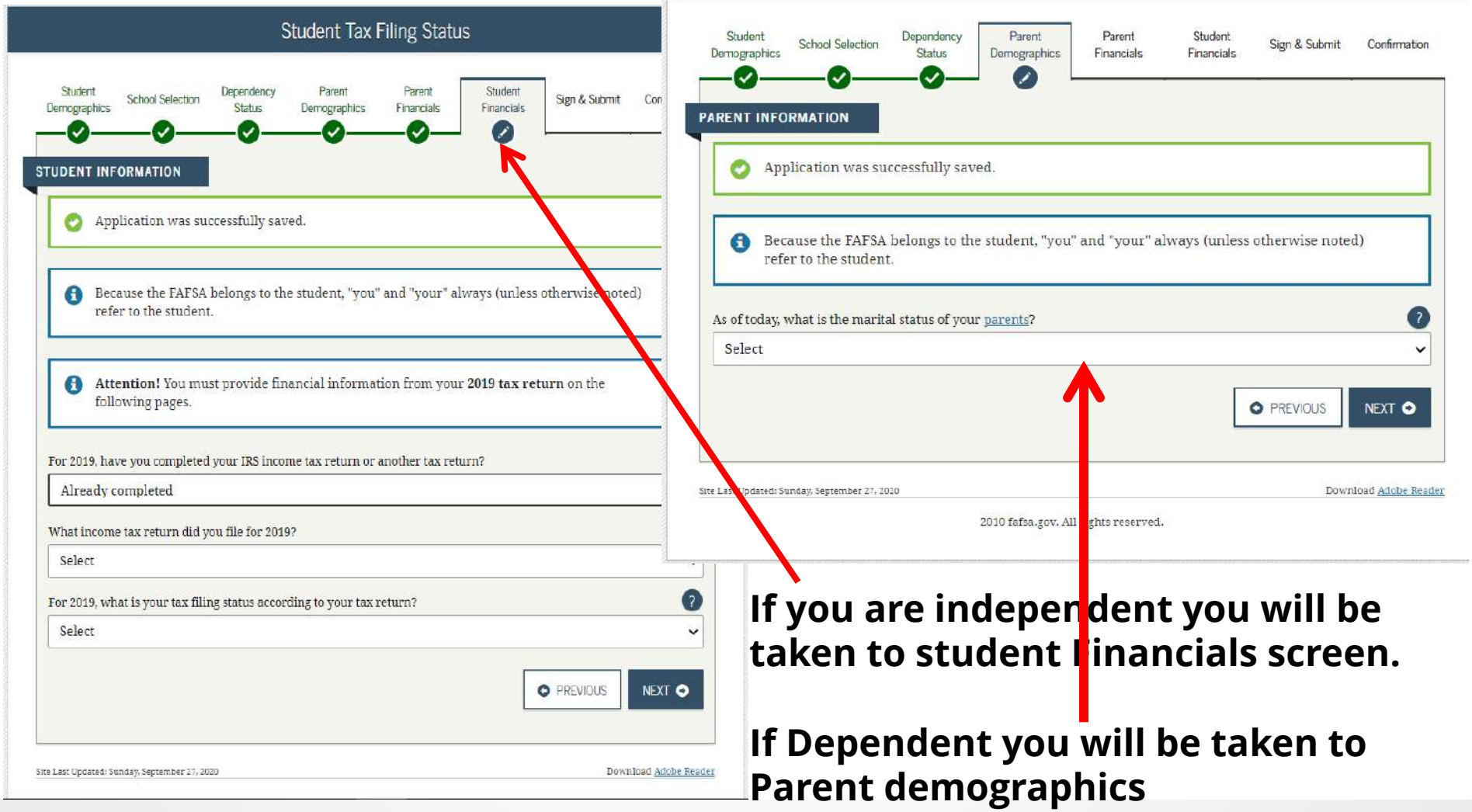
If the student answers "yes" to any Dependency questions, they will be presented with this screen.

You do not want to answer questions about your parents.

If independent the student will be taken to the student Financials section



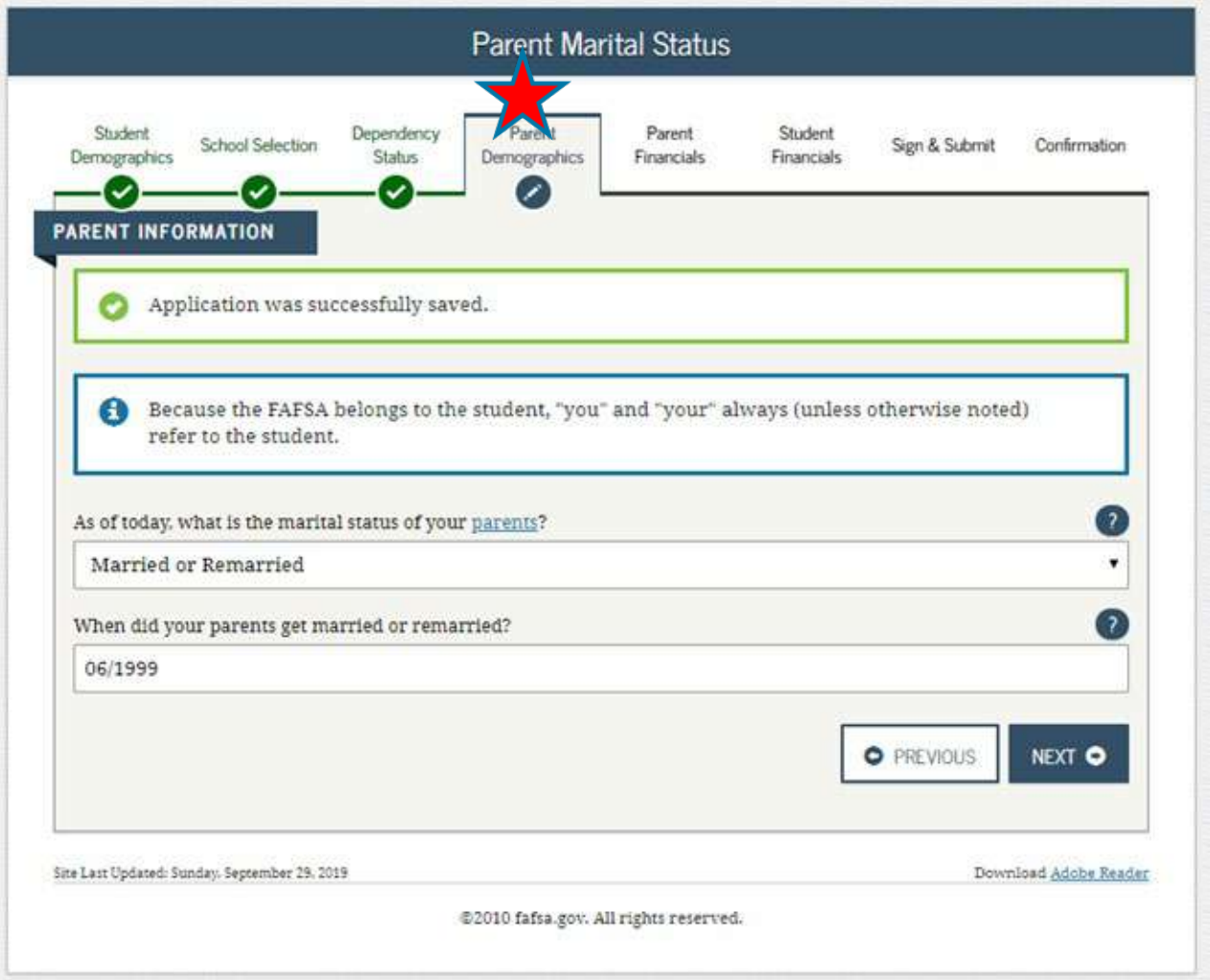
Student Financials *(independent student)* or Parent Demographics *(dependent student)*



If you are independent you will be taken to student financials screen.

If Dependent you will be taken to Parent demographics

Parent Demographics



Update parent marital status and month/year

- Married/remarried
- Divorced/separated
- Never married
- Widowed
- Unmarried and both legal parents living together

Click Next

Parent Demographics

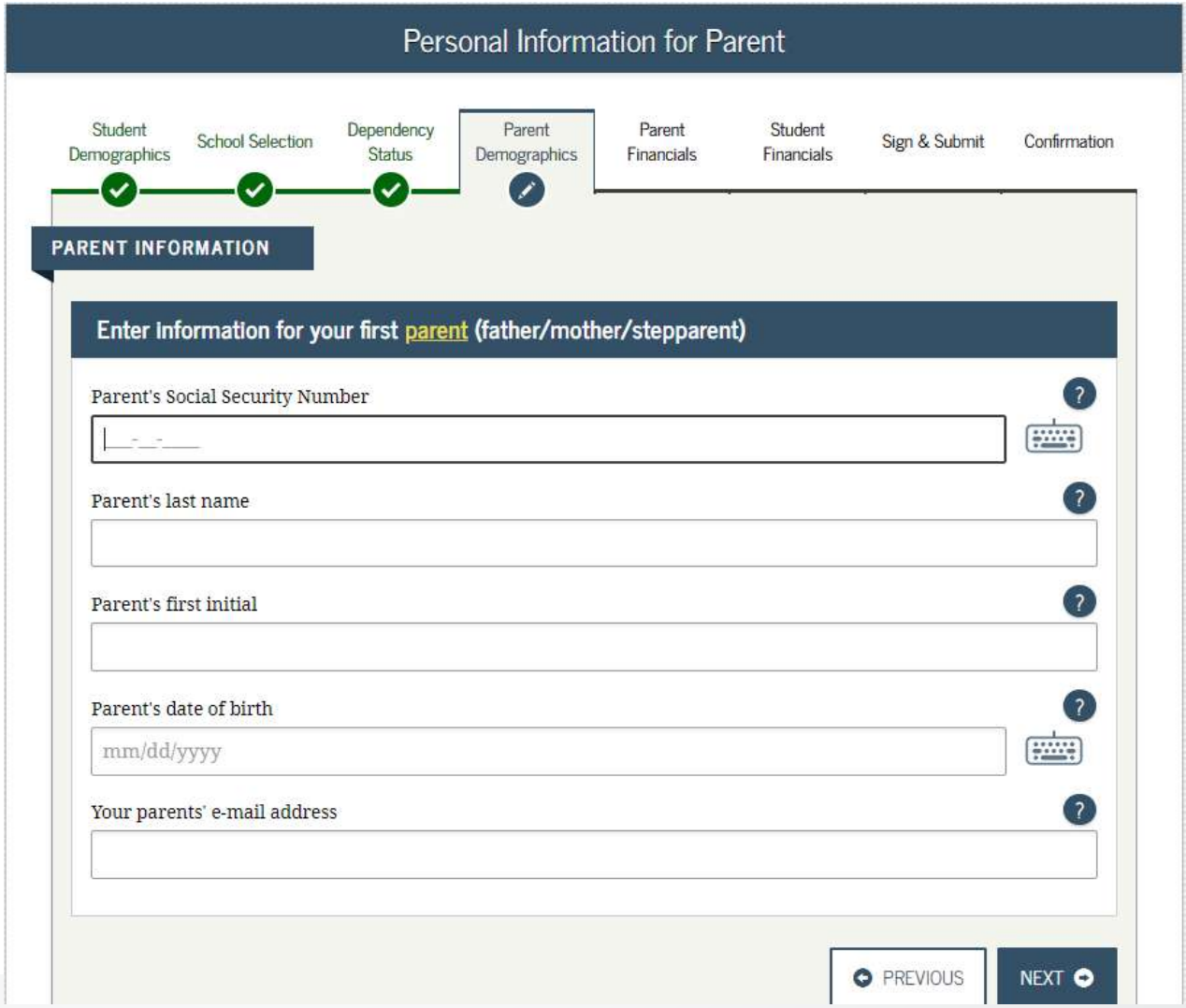
First parent (parent 1)

SSN must match last name

Be consistent if first parent (parent 1) is dad, keep him first parent (parent 1) throughout the application)

Remember which parent you listed as first parent (parent 1)

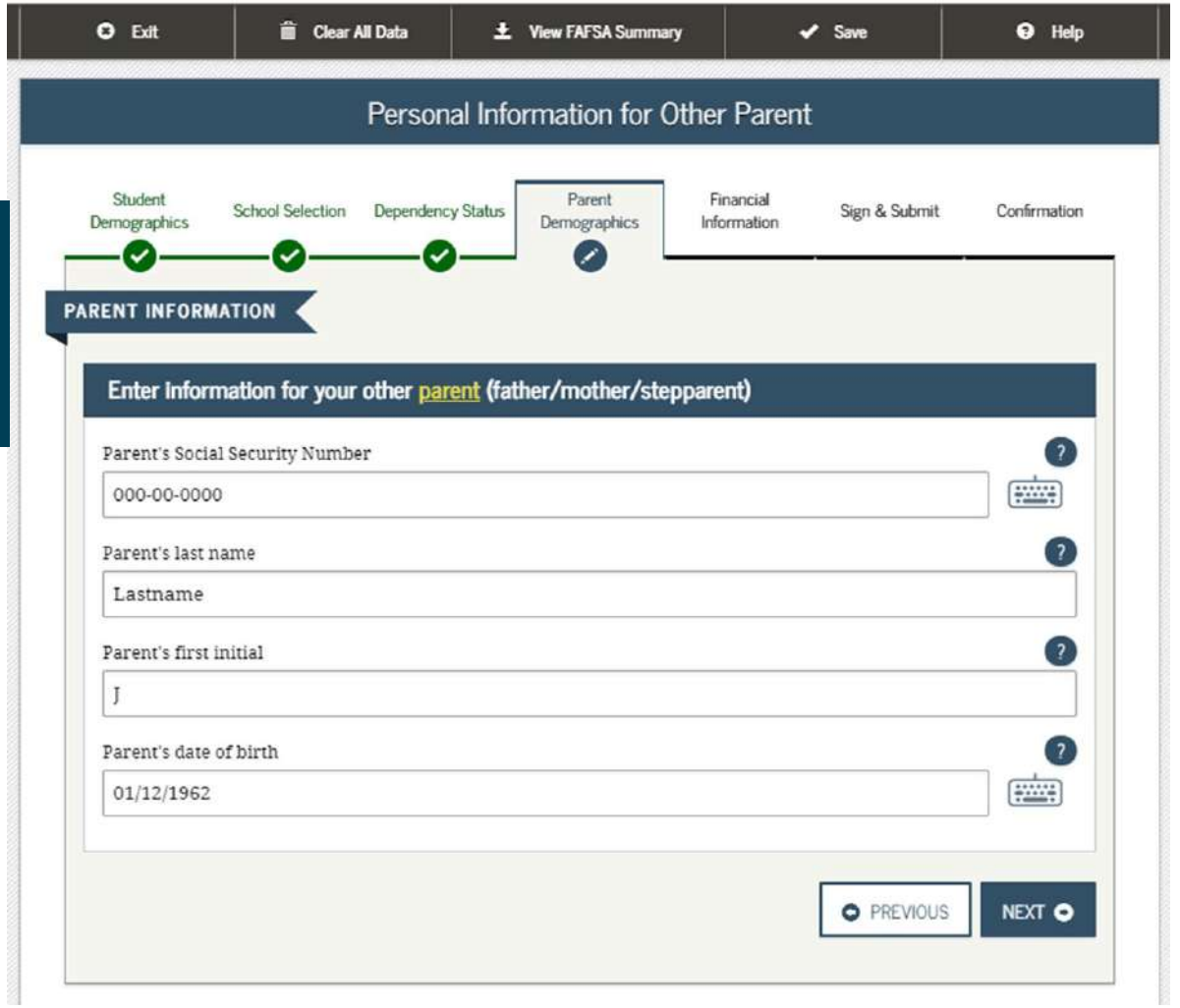
Click Next



Parent Demographics

Personal Information for other parent (parent 2)

Click Next



Parent Demographics

Parent's Residency question

Click Next

Household Size & Number in College - 2021-22

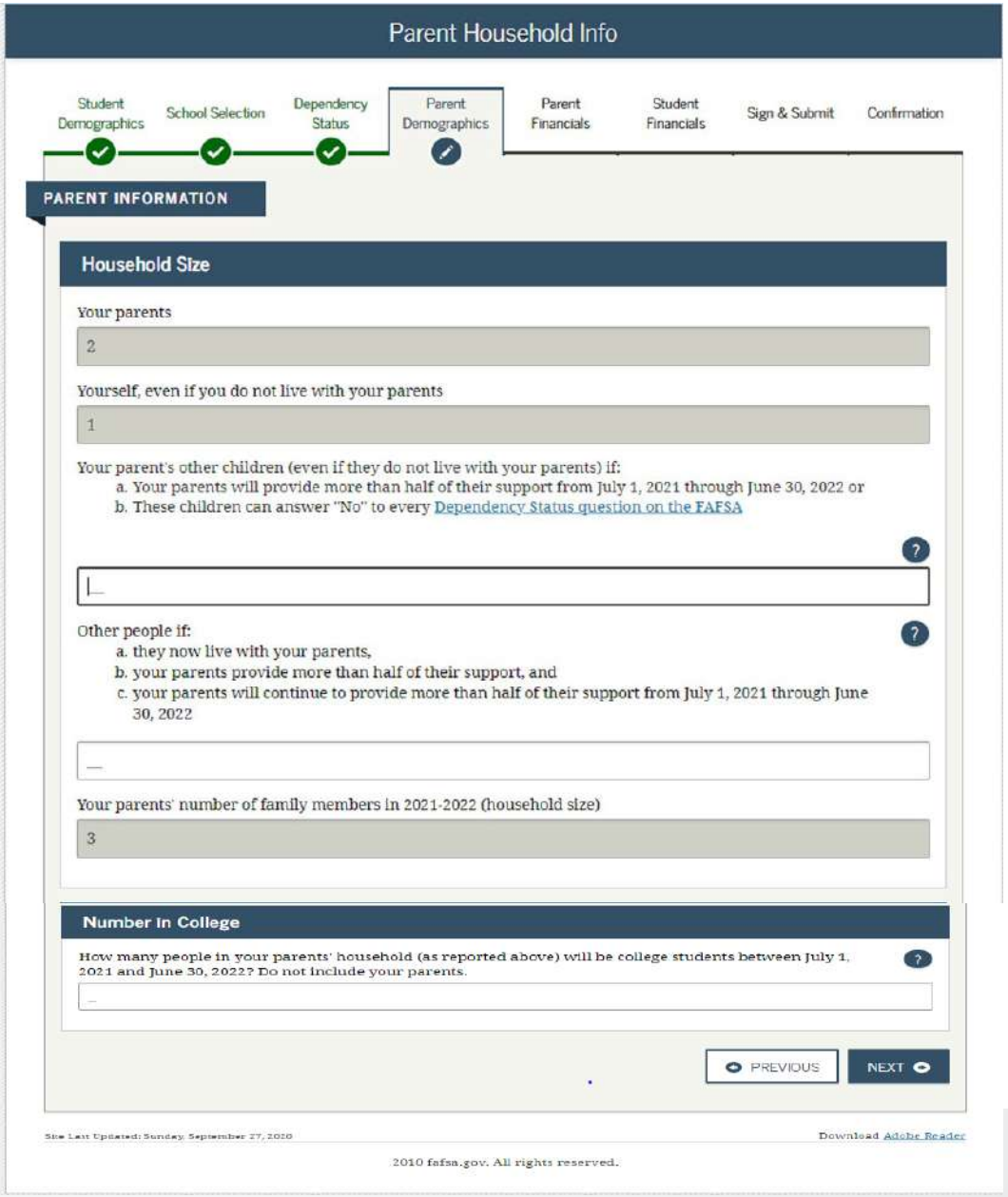
Parents – based off of marital status

Student completing the FAFSA

# of other children that live in the household

Other people in the household that your parents provide more than half of their support

in college in 2021-22 includes student



Parent Financials

Parent Tax filing screen shot

Parent tax filing status:

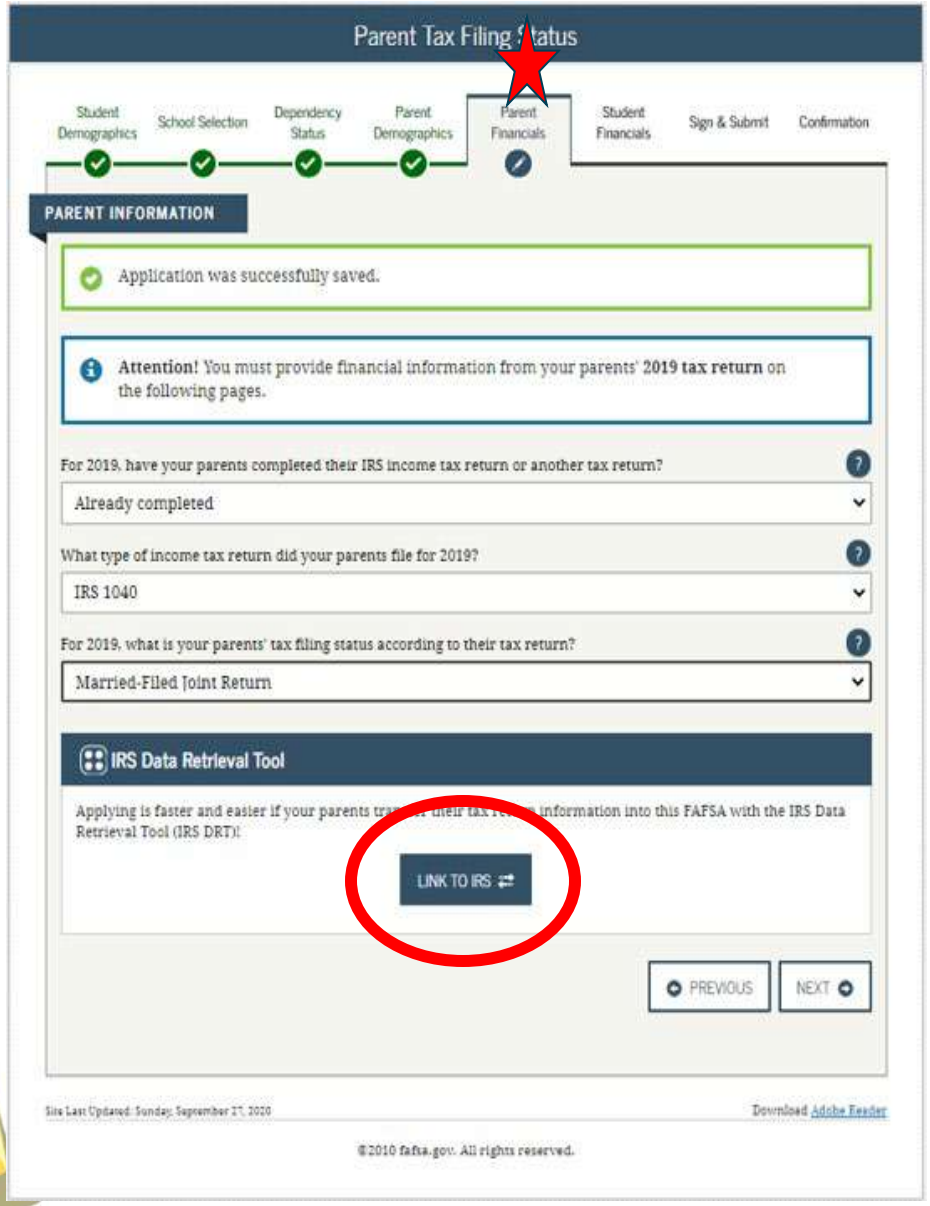
- Already completed
- Will file
- Not required to file

Type of income tax return filed

How did they file?

- Single
- Head of household
- Married-filed joint return
- Married–filed separate return
- Qualifying widow(er)
- Don't know

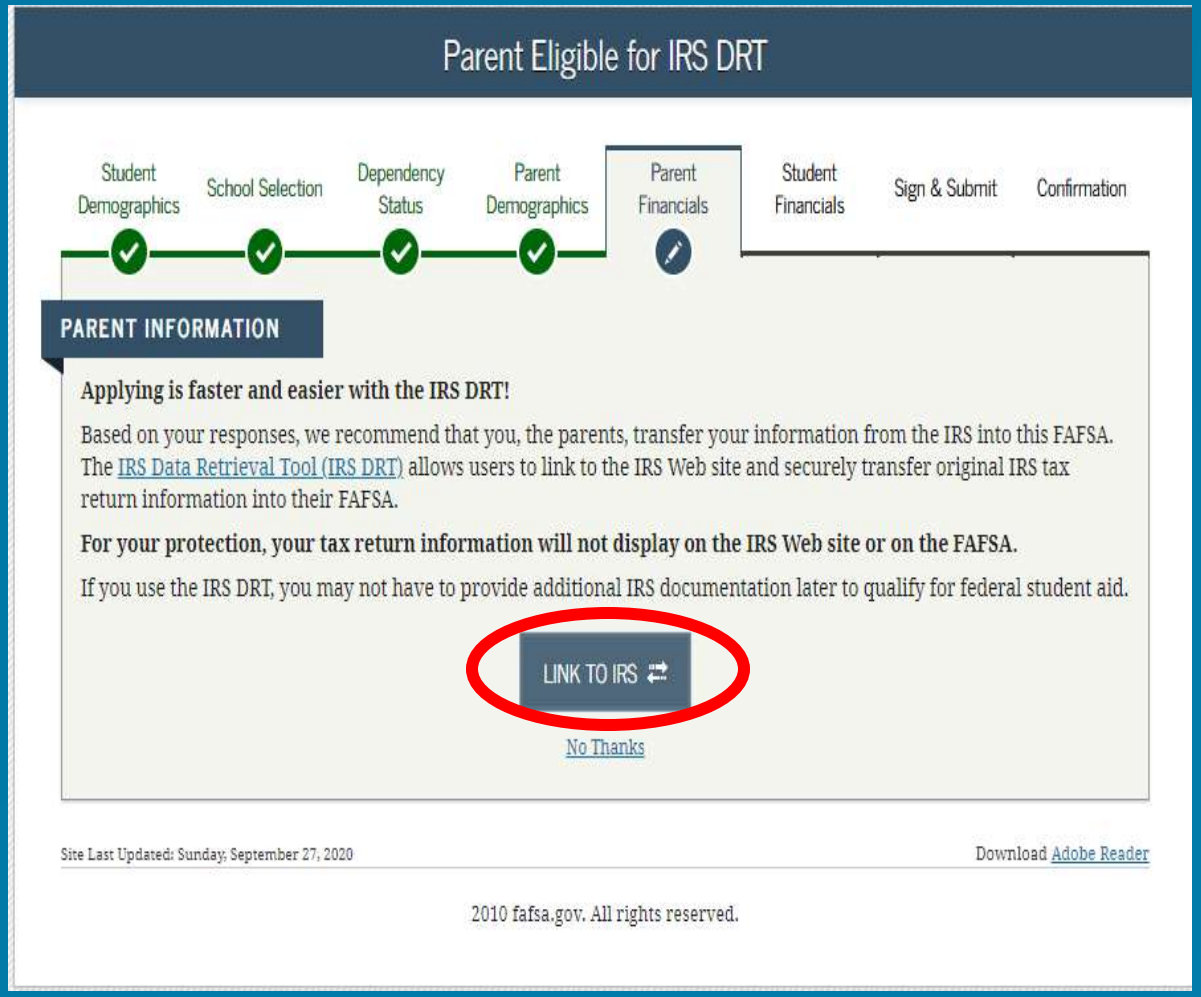
If already filed, option for IRS DRT will open



Tax filers flagged due to identity theft can't use IRS DRT.

Parent Financials

Parent eligible to use IRS DRT

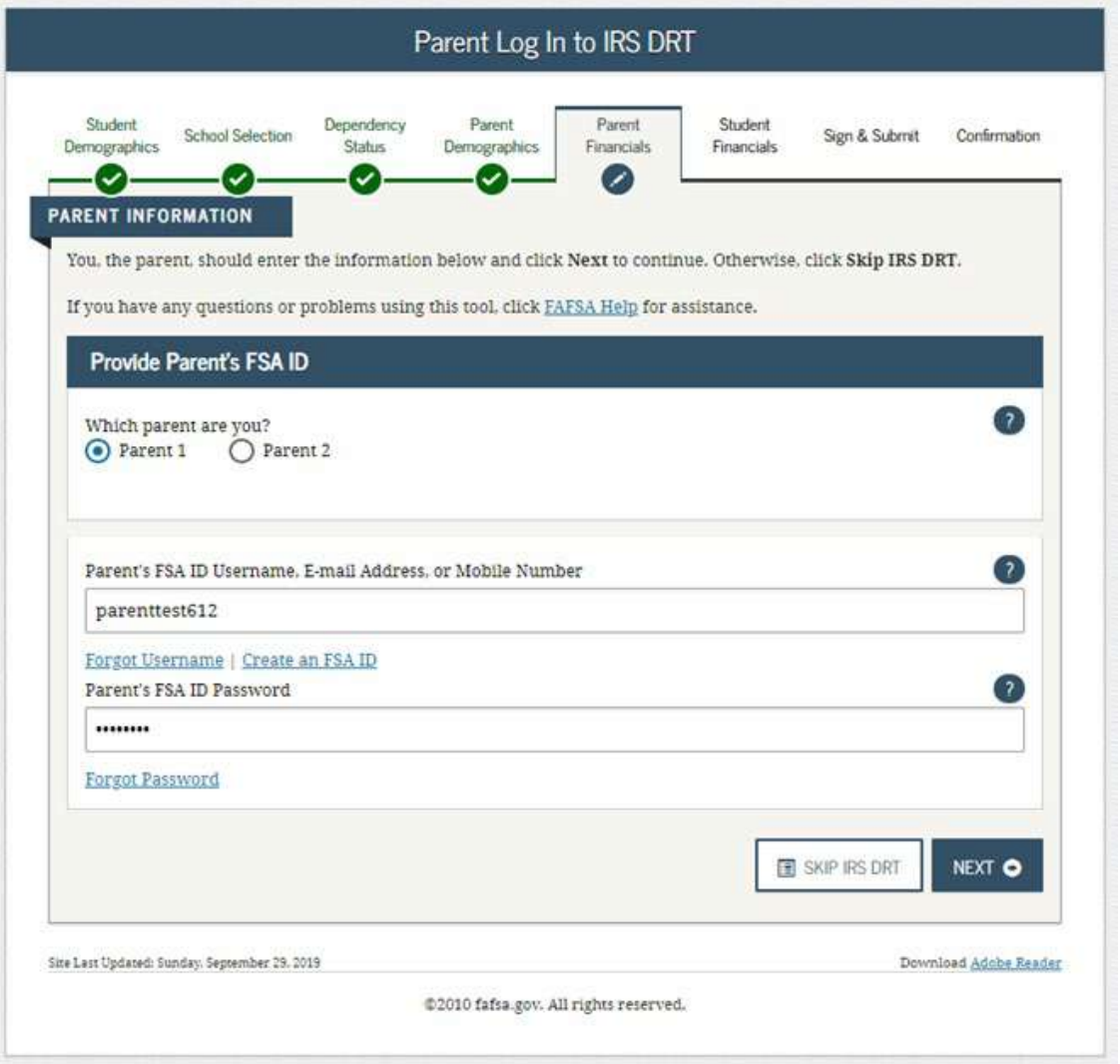


Parent Financials

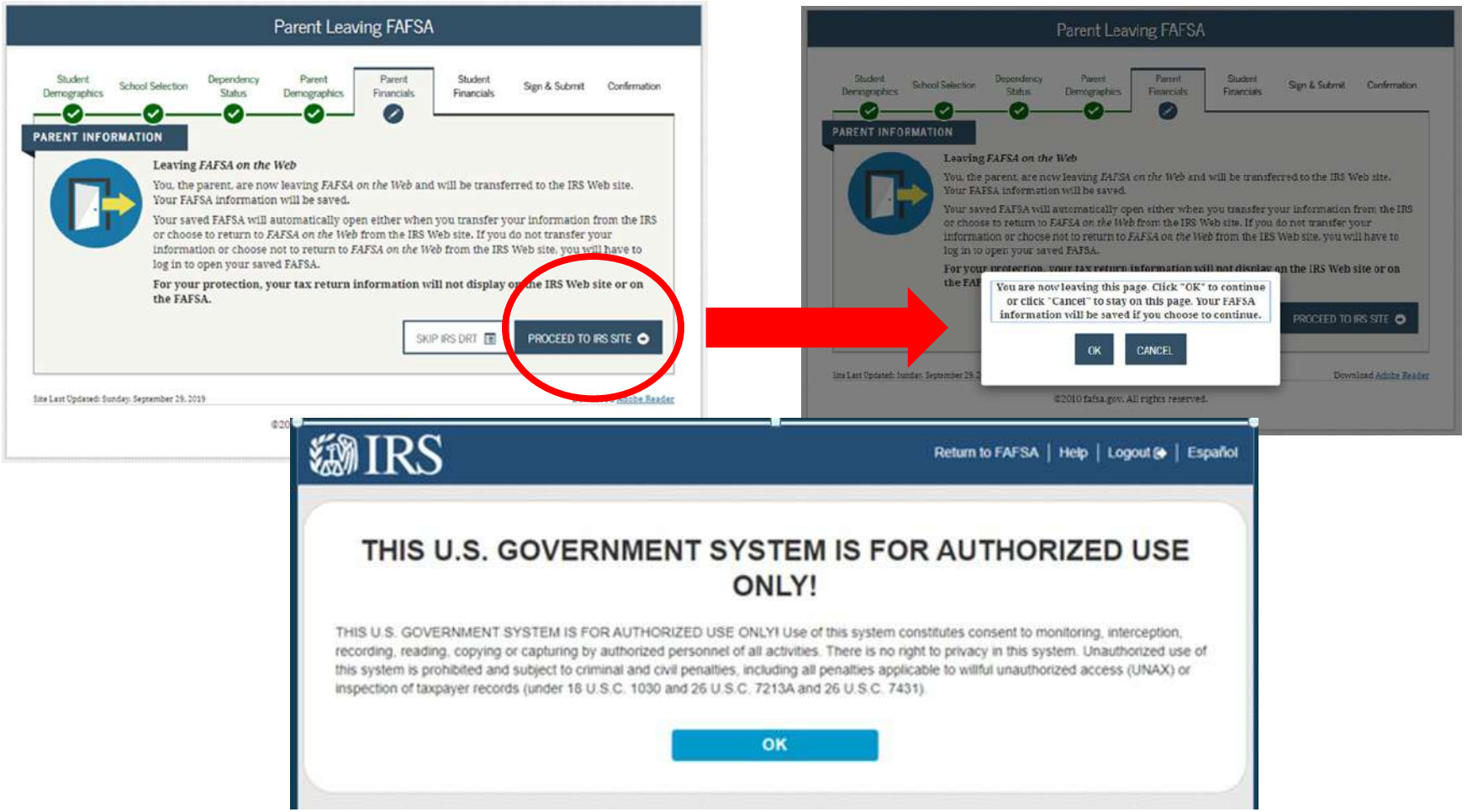
Parent with FSA ID will select whether they are Parent 1 or Parent 2

Input FSA ID Username, verified email address or verified mobile number and Password

Click Next



Parent Financials



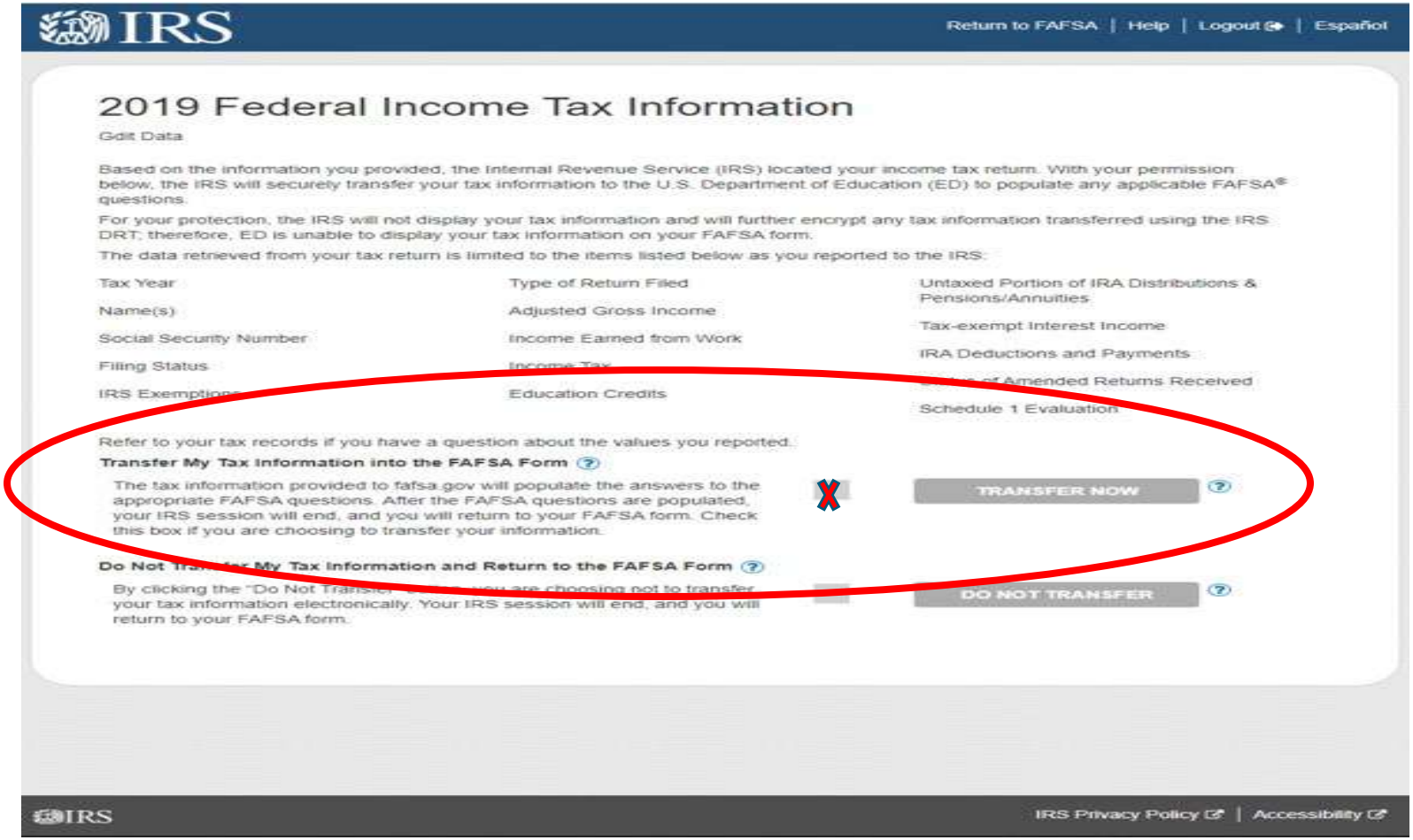
Parent Financials – IRS Data Retrieval Tool

All data must match

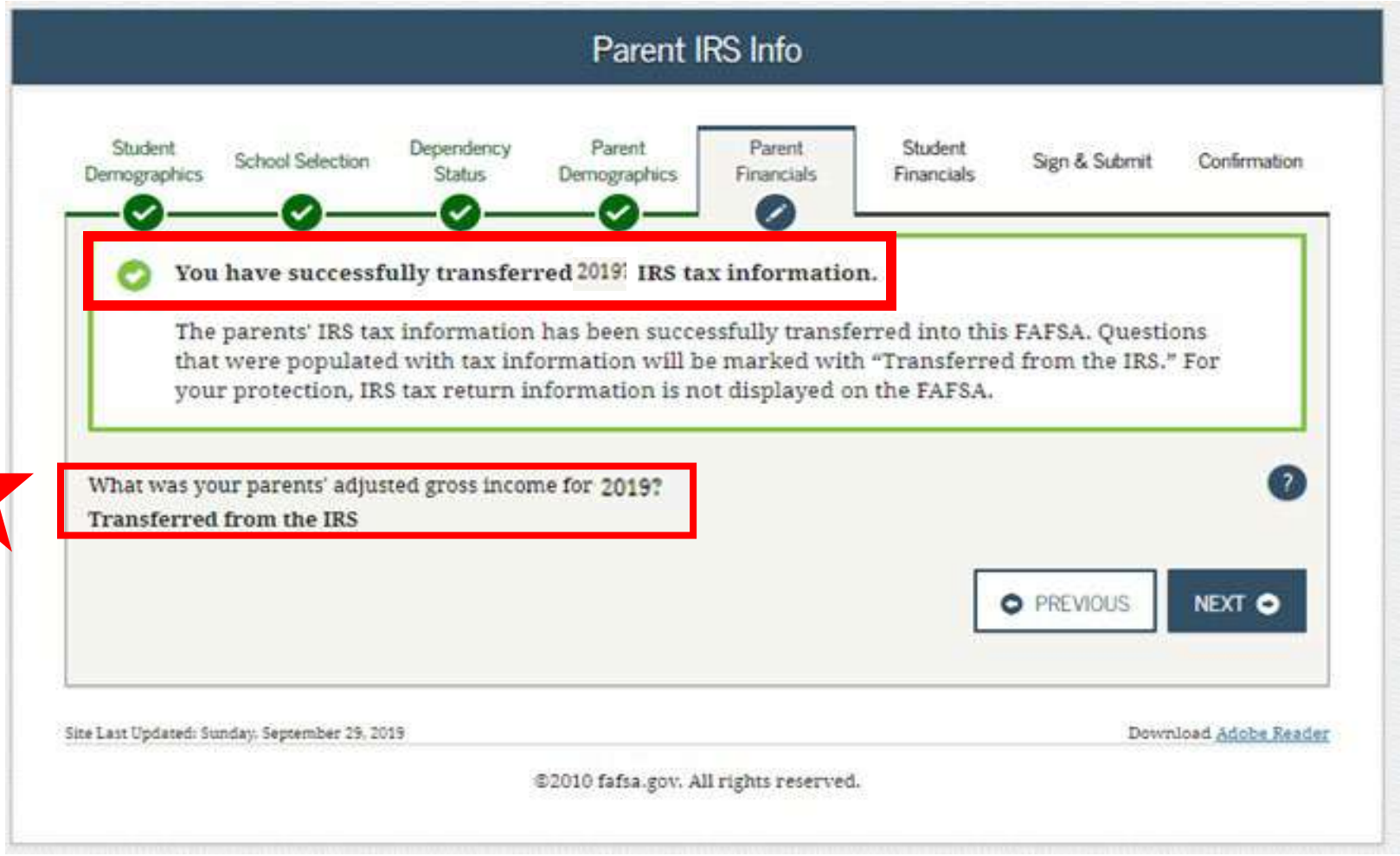
Use address as it appears on your tax return

Click Submit

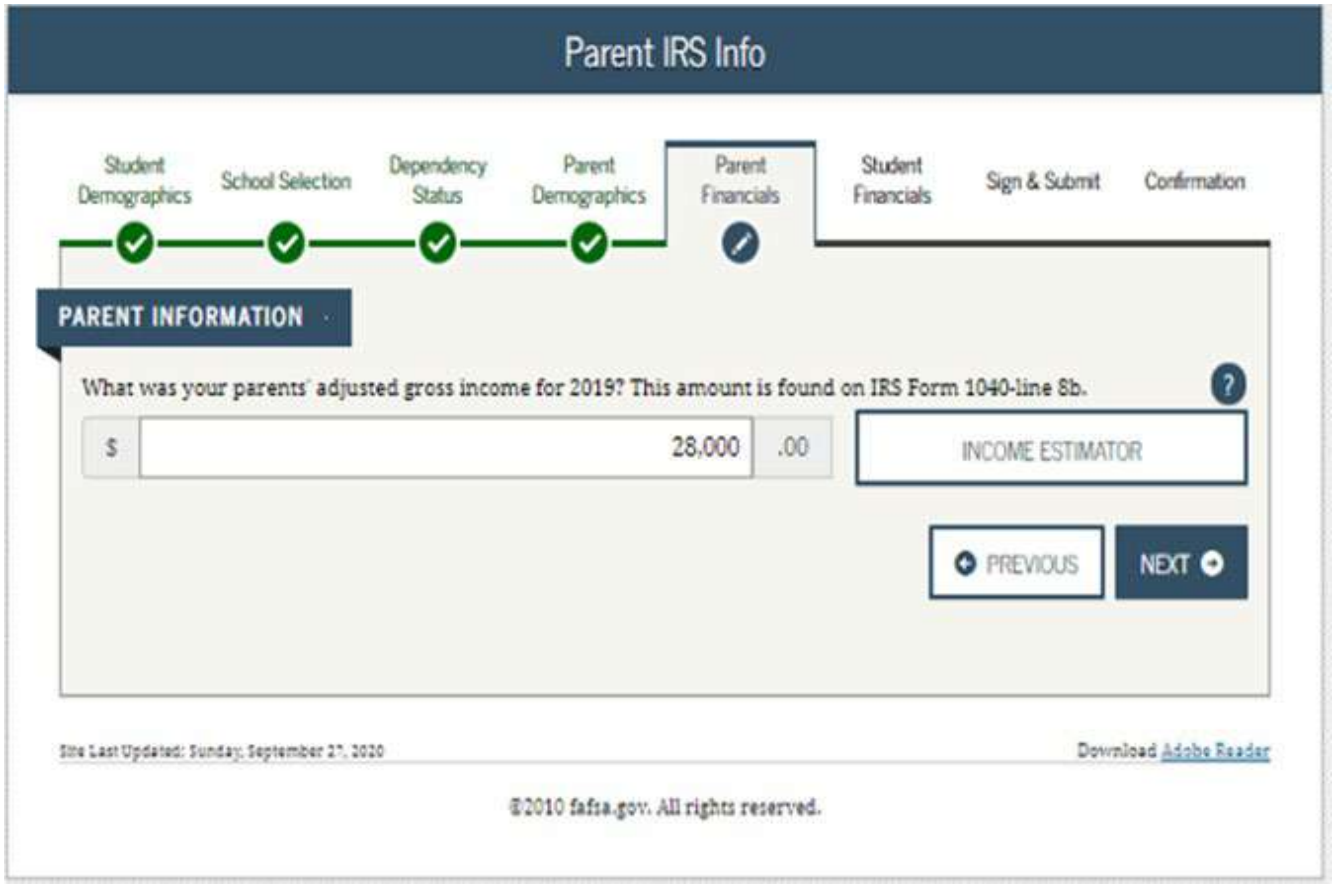
Parent Financials – IRS Data Retrieval Tool



Parent Financials –Transferred from the IRS



Parent Financials – if you can't use IRS DRT



If you cannot use the IRS DRT, complete the information manually

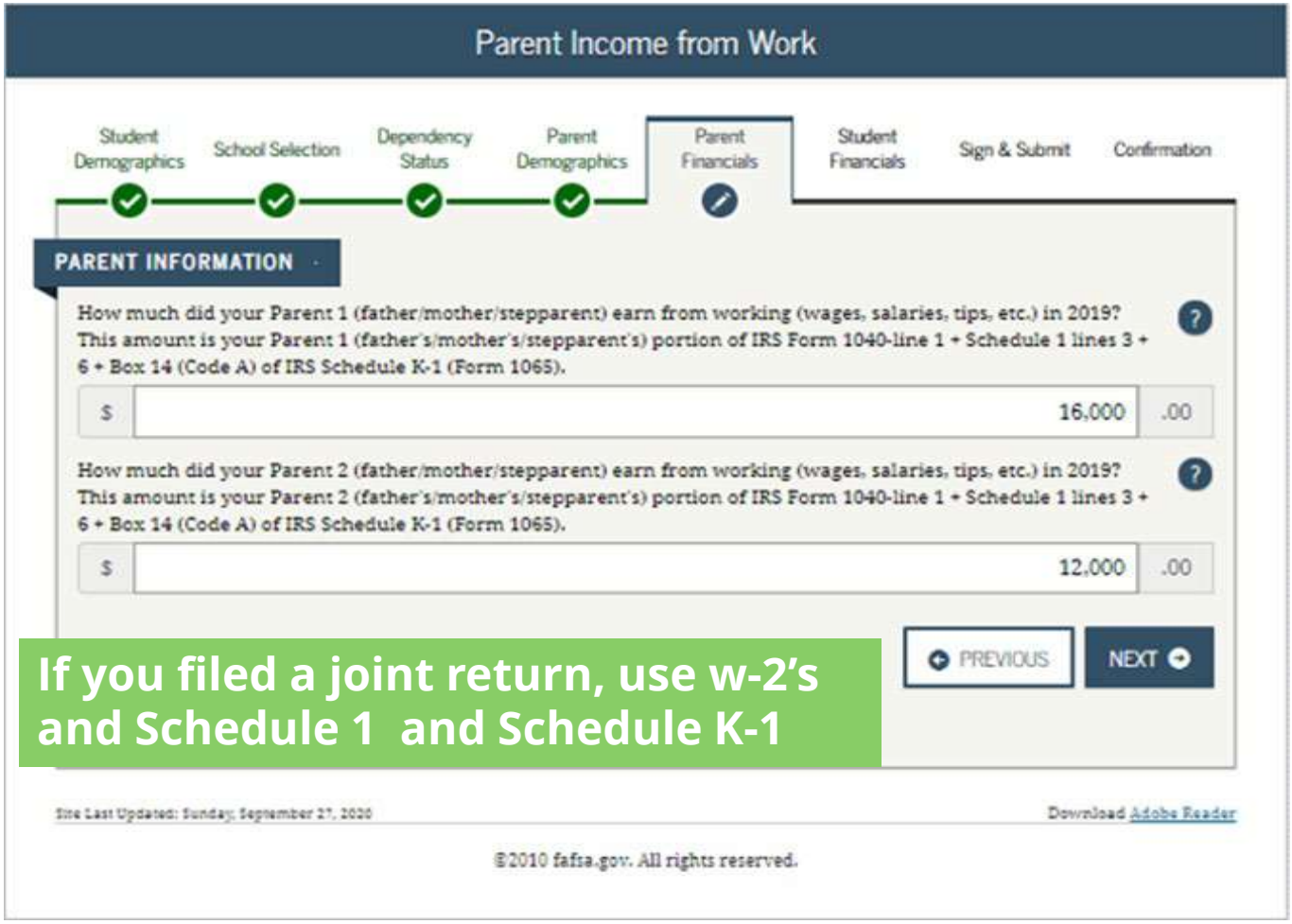
Fill in the AGI – it will tell you what line to take it off of the tax return

Click Next

Parent Financials

Indicate how much of the wages were earned by Parent 1 and Parent 2

Click Next



If you filed a joint return, use w-2's and Schedule 1 and Schedule K-1

2019 W-2

EXAMPLE W-2

22222	a Employee's social security number **123-45-6789**	OMB No.	
b Employer identification number (EIN) **11-1111112**		1 Wages, tips, other compensation **98,500.00**	2 Federal income tax withheld **15,000.00**
c Employer's name, address, and ZIP code **TOPCOMPANY 123 STREET RD ANYWHERE, USA, 12345**		3 Social security wages **100,000.00**	4 Social security tax withheld **5000.00**
		5 Medicare wages and tips **100,000.00**	6 Medicare tax withheld **1100.00**
		7 Social security tips	8 Allocated tips
d Control number		9	10 Dependent care benefits
e Employee's first name and initial Last name Suff. **TOM T. TAXPAYER 456 ROAD ST ANYWHERE, USA, 12345** f Employee's address and ZIP code		11 Nonqualified plans	12a C o d e **D** **1,500.00**
		13 Statutory employee ☐ Retirement plan **X** Third-party sick pay ☐	12b C o d e **DD** **1,000.00**
		14 Other	12c C o d e
			12d C o d e

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
US	1234	100,000	3000	100,000	4000	USA

Form **W-2** Wage and Tax Statement 2019 Department of the Treasury—Internal Revenue Service

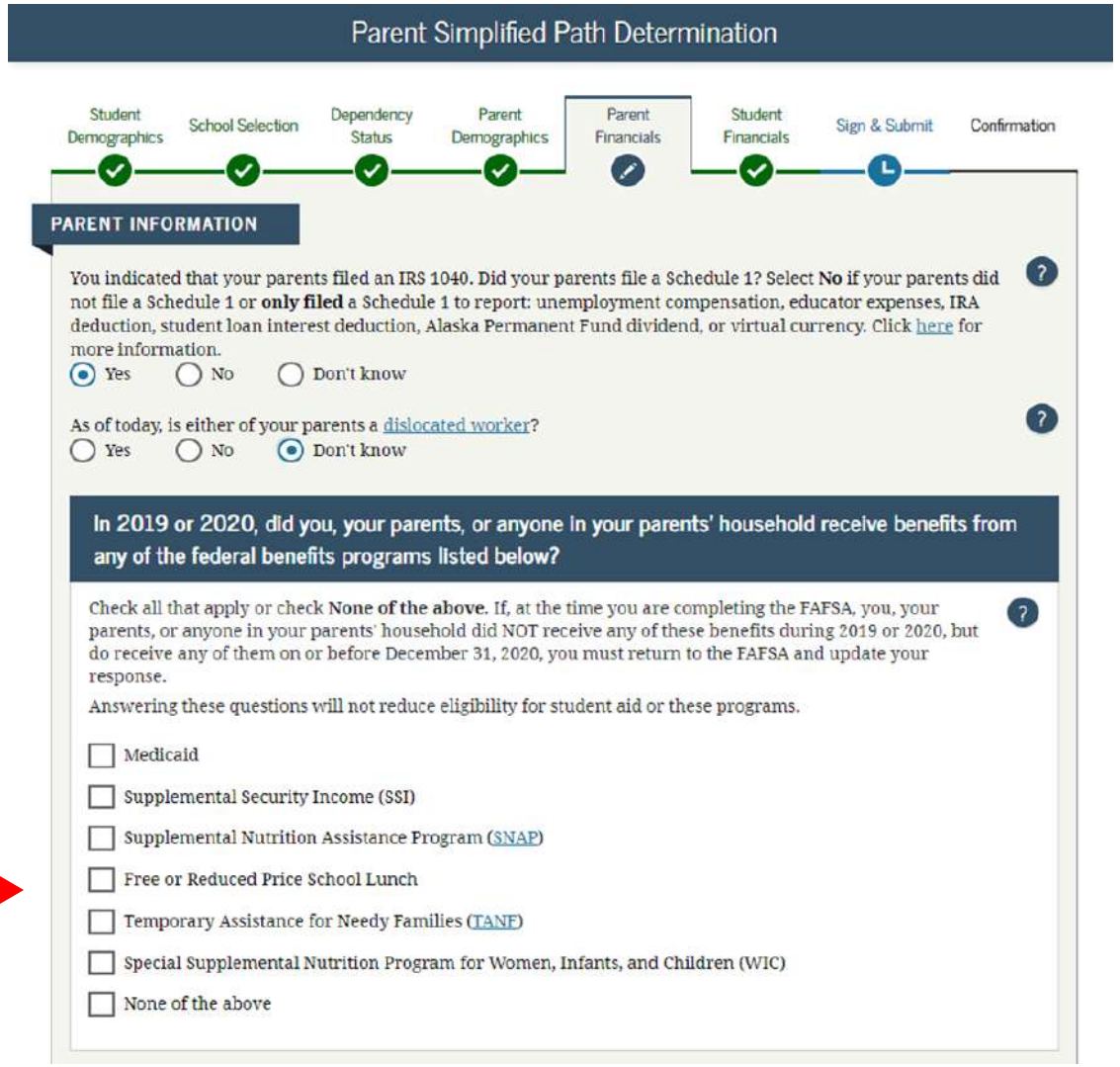
Copy 1—For State, City, or Local Tax Department

AGERAS

Parent Financials - Simplified Path Determination

These questions are used to help determine if your parent(s) may be eligible to skip certain financial questions in the FAFSA form.

Indicate any benefits received from the federal benefits programs in 2019 or 2020.



Skip Remaining Questions?

When presented with the question to skip remaining parent and student income and assets – say YES

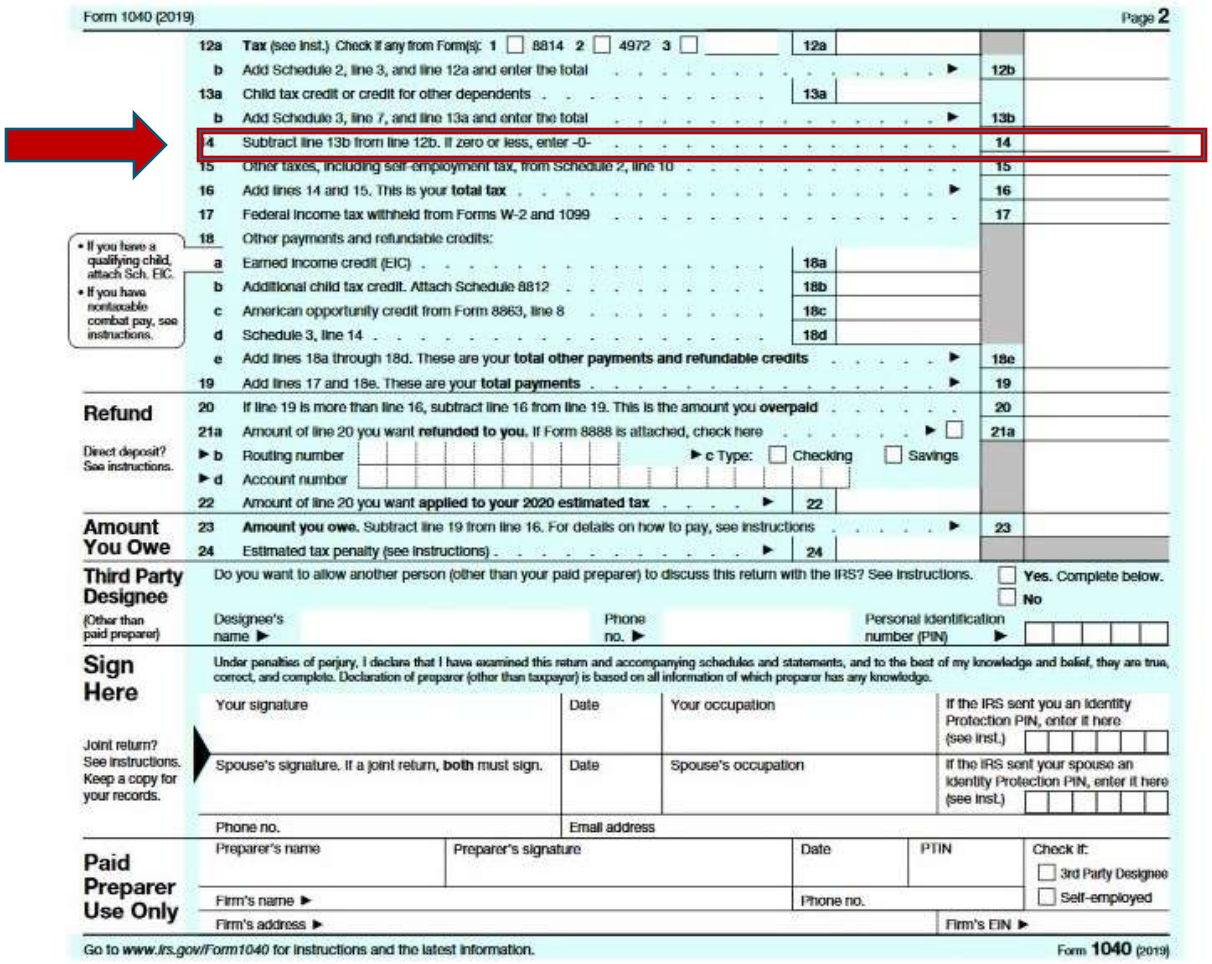
It will then take you to the end of the Form to sign and submit

Enter the amount of parents income tax paid.

Click Next

***Refer to 1040 and Schedule 2**

2019 1040



Form 1040 (2019) Page 2

12a	**Tax** (see inst.) Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	12a		
b	Add Schedule 2, line 3, and line 12a and enter the total ▶		12b	
13a	Child tax credit or credit for other dependents	13a		
b	Add Schedule 3, line 7, and line 13a and enter the total ▶		13b	
14	Subtract line 13b from line 12b. If zero or less, enter -0-		14	
15	Other taxes, including self-employment tax, from Schedule 2, line 10		15	
16	Add lines 14 and 15. This is your **total tax** ▶		16	
17	Federal income tax withheld from Forms W-2 and 1099		17	
18	Other payments and refundable credits:			
a	Earned income credit (EIC)	18a		
b	Additional child tax credit. Attach Schedule 8812	18b		
c	American opportunity credit from Form 8863, line 8	18c		
d	Schedule 3, line 14	18d		
e	Add lines 18a through 18d. These are your **total other payments and refundable credits** ▶		18e	
19	Add lines 17 and 18e. These are your **total payments** ▶		19	
20	If line 19 is more than line 16, subtract line 16 from line 19. This is the amount you **overpaid**		20	
21a	Amount of line 20 you want **refunded to you.** If Form 8888 is attached, check here ▶ ☐		21a	
▶ b	Routing number ▶ c Type: ☐ Checking ☐ Savings			
▶ d	Account number			
22	Amount of line 20 you want **applied to your 2020 estimated tax** ▶	22		
23	**Amount you owe.** Subtract line 19 from line 16. For details on how to pay, see instructions ▶		23	
24	Estimated tax penalty (see instructions) ▶	24		

• If you have a qualifying child, attach Sch. EIC.
• If you have nontaxable combat pay, see instructions.

Refund

Direct deposit? See instructions.

Amount You Owe

Third Party Designee (Other than paid preparer)

Do you want to allow another person (other than your paid preparer) to discuss this return with the IRS? See instructions. ☐ **Yes.** Complete below. ☐ **No**

Designee's name ▶ | Phone no. ▶ | Personal identification number (PIN) ▶

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
Phone no.	Email address		

Joint return? See instructions. Keep a copy for your records.

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ 3rd Party Designee ☐ Self-employed
Firm's name ▶		Phone no.		
Firm's address ▶			Firm's EIN ▶	

Go to *www.irs.gov/Form1040* for instructions and the latest information. Form **1040** (2019)

Schedule 2

SCHEDULE 2
(Form 1040 or 1040-SR)

Department of the Treasury
Internal Revenue Service

Additional Taxes

▶ Attach to Form 1040 or 1040-SR.
▶ Go to *www.irs.gov/Form1040* for instructions and the latest information.

OMB No. 1545-0074

2019

Attachment Sequence No. 02

Name(s) shown on Form 1040 or 1040-SR | **Your social security number**

Part I Tax

1	Alternative minimum tax. Attach Form 6251	1	
2	Excess advance premium tax credit repayment. Attach Form 8962	2	
3	Add lines 1 and 2. Enter here and include on Form 1040 or 1040-SR, line 12b	3	

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4	
5	Unreported social security and Medicare tax from Form: a ☐ 4137 b ☐ 8919	5	
6	Additional tax on IRAs, other qualified retirement plans, and other tax-favored accounts. Attach Form 5329 if required	6	
7a	Household employment taxes. Attach Schedule H	7a	
b	Repayment of first-time homebuyer credit from Form 5405. Attach Form 5405 if required	7b	
8	Taxes from: a ☐ Form 8959 b ☐ Form 8960 c ☐ Instructions; enter code(s)	8	
9	Section 965 net tax liability installment from Form 965-A 9		
10	Add lines 4 through 8. These are your **total other taxes.** Enter here and on Form 1040 or 1040-SR, line 15	10	

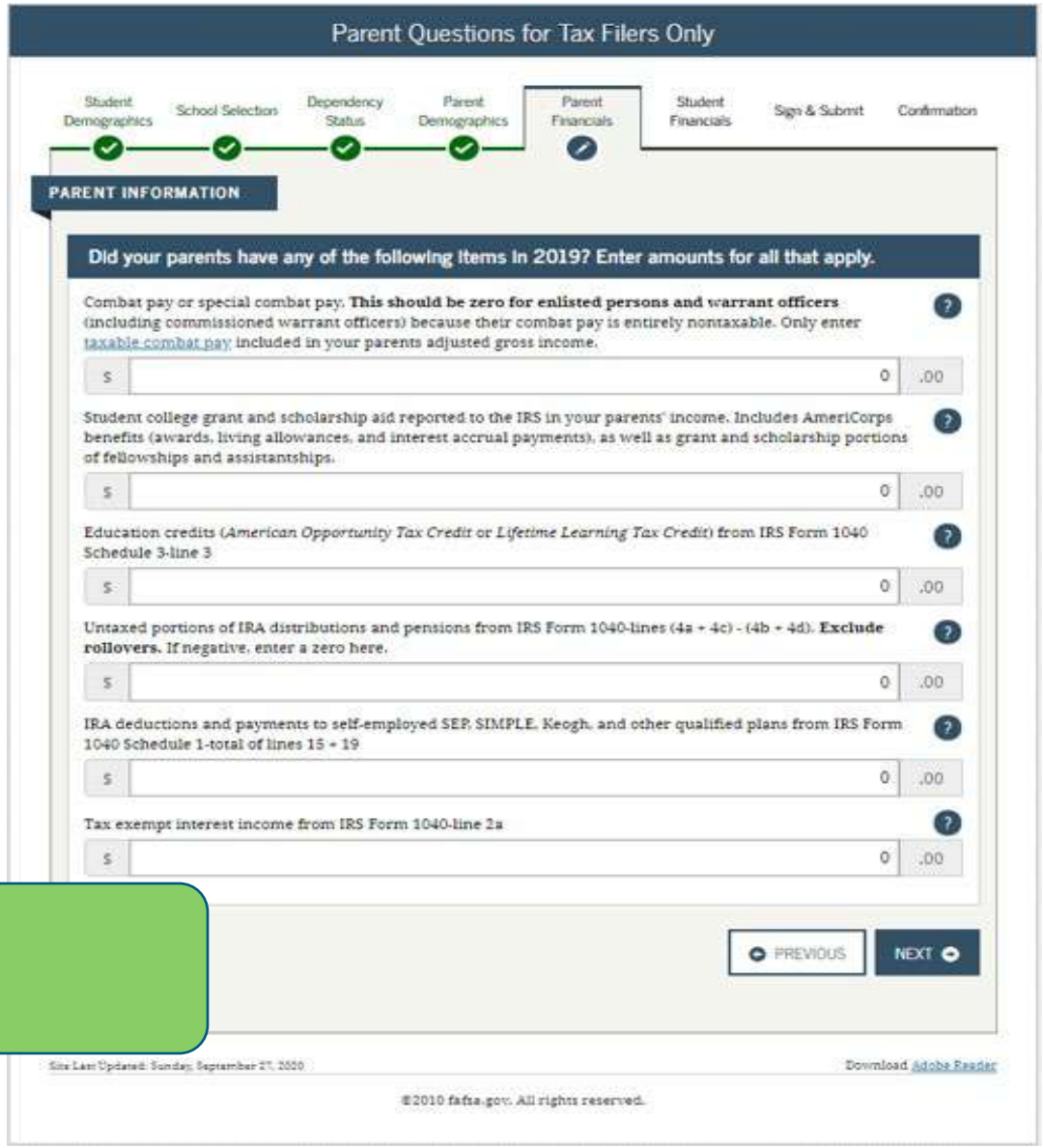
For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71478U **Schedule 2 (Form 1040 or 1040-SR) 2019**

Parent Financials

If you used the IRS DRT, these answers will transfer from the tax return into the form.

If you did not use the IRS DRT, it tells you what line to use on the tax return

***Refer to 1040**

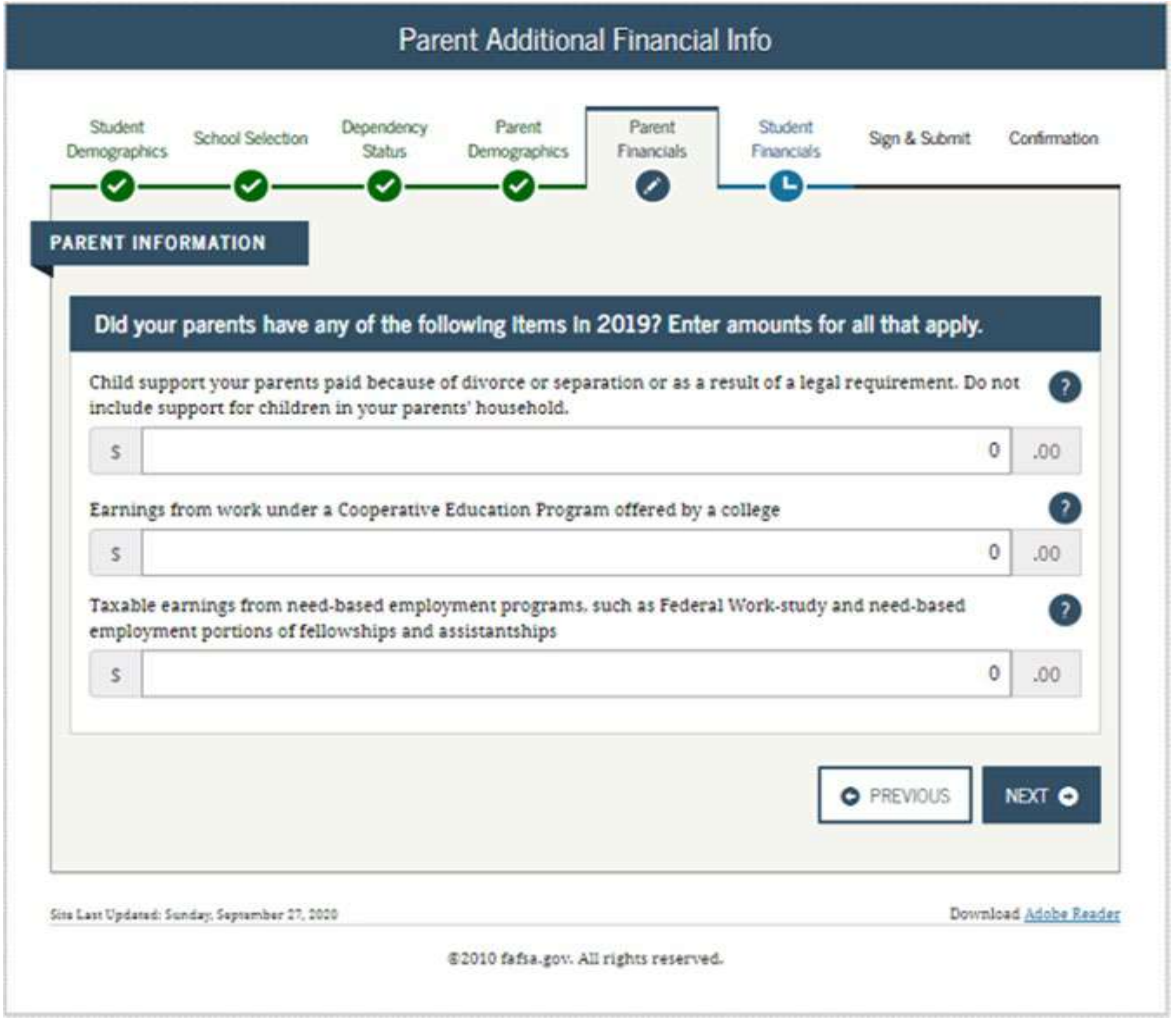


Parent Financials

Indicate any child support that was paid

If parents are students and had a work study position, those wages are listed here

Click Next



Parent Financials – Untaxed Income

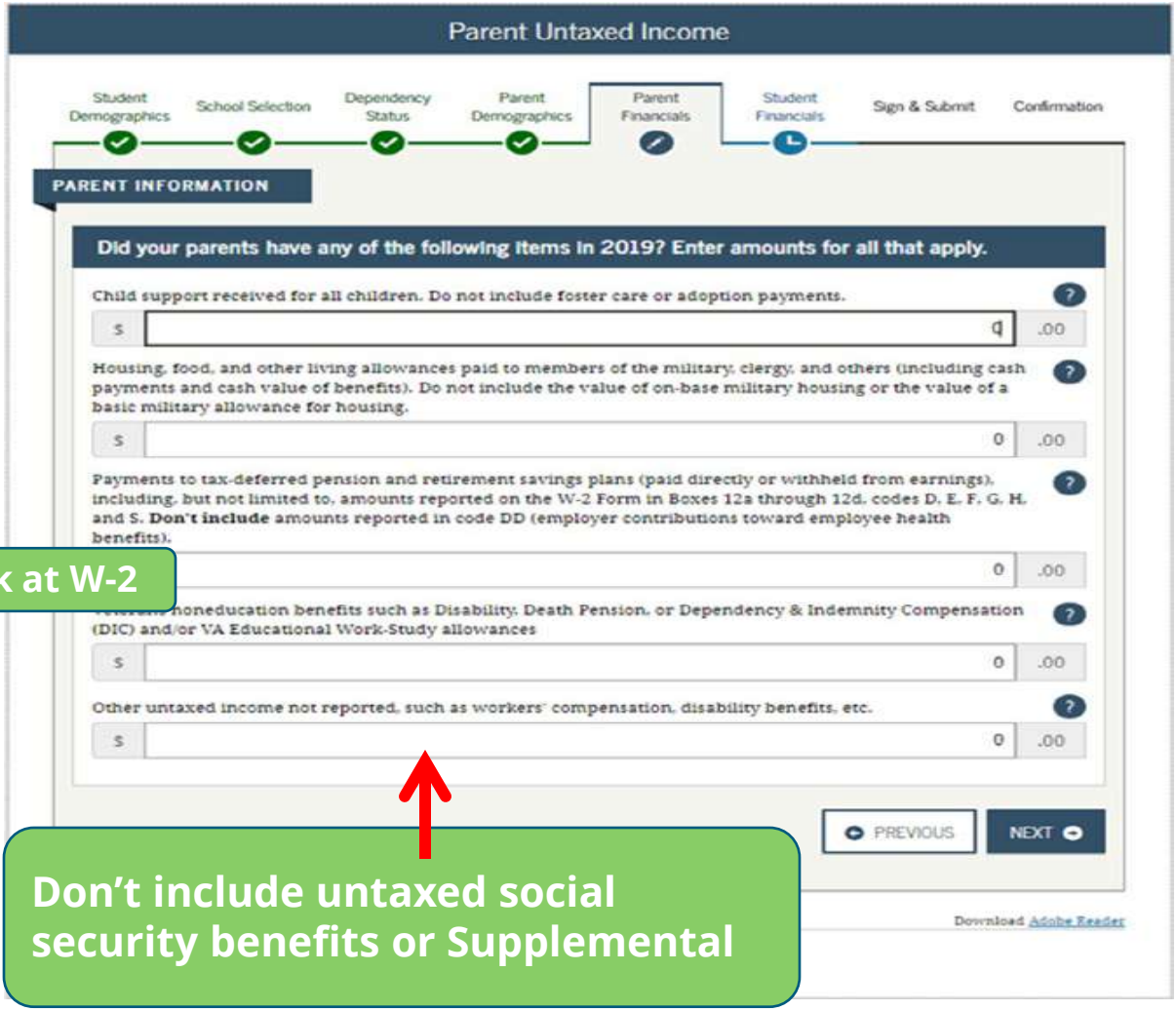
Additional untaxed income

Child support received

Tax-deferred payments to pensions are included if they have one of the letters (D, E, F, G, H and S) listed next to an amount in boxes 12a to 12 d of the W-2

Other untaxed income - worker's compensation, disability benefits, etc.

Click Next



Look at W-2

Don't include untaxed social security benefits or Supplemental

2019 W-2

EXAMPLE W-2

22222

a Employee's social security number: **123-45-6789**

OMB No. 1545-0008

b Employer identification number (EIN): **11-1111112**

c Employer's name, address, and ZIP code:
TOPCOMPANY
123 STREET RD
ANYWHERE, USA, 12345

d Control number

e Employee's first name and initial: **TOM T.** Last name: **TAXPAYER** Suff.
456 ROAD ST
ANYWHERE, USA, 12345

f Employee's address and ZIP code

1 Wages, tips, other compensation	**98,500.00**
2 Federal income tax withheld	**15,000.00**
3 Social security wages	**100,000.00**
4 Social security tax withheld	**5000.00**
5 Medicare wages and tips	**100,000.00**
6 Medicare tax withheld	**1100.00**
7 Social security tips	
8 Allocated tips	
9	
11 Nonqualified plans	
12a	**D 1,500.00**
13 Statutory employee / Retirement plan: X / Third-party sick pay	
12b	**DD 1,000.00**
14 Other	
12c	
12d	

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
US	**1234**	**100,000**	**3000**	**100,000**	**4000**	**USA**

Form **W-2** Wage and Tax Statement

2019

Department of the Treasury—Internal Revenue Service

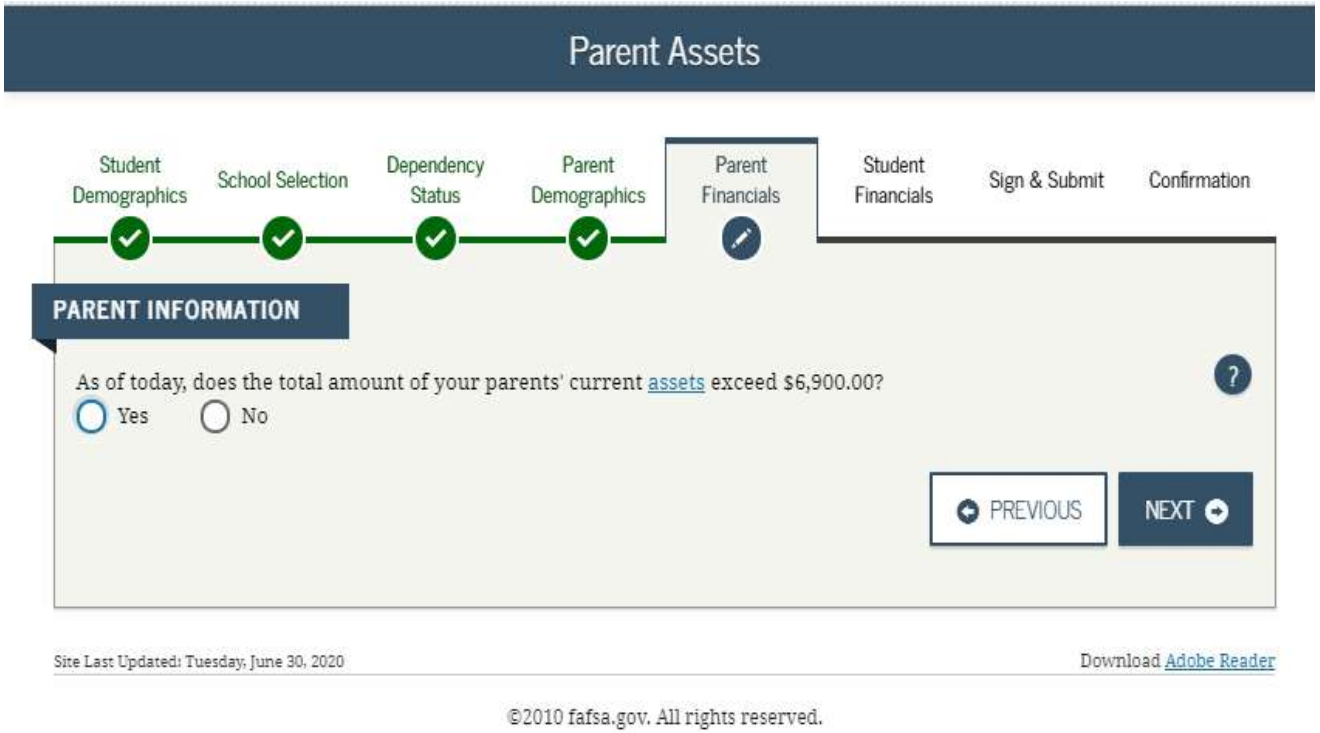
Copy 1—For State, City, or Local Tax Department

AGERAS

Parent Assets

If answer is No, you can skip this section.

If answer is yes – you will have to provide parent asset information

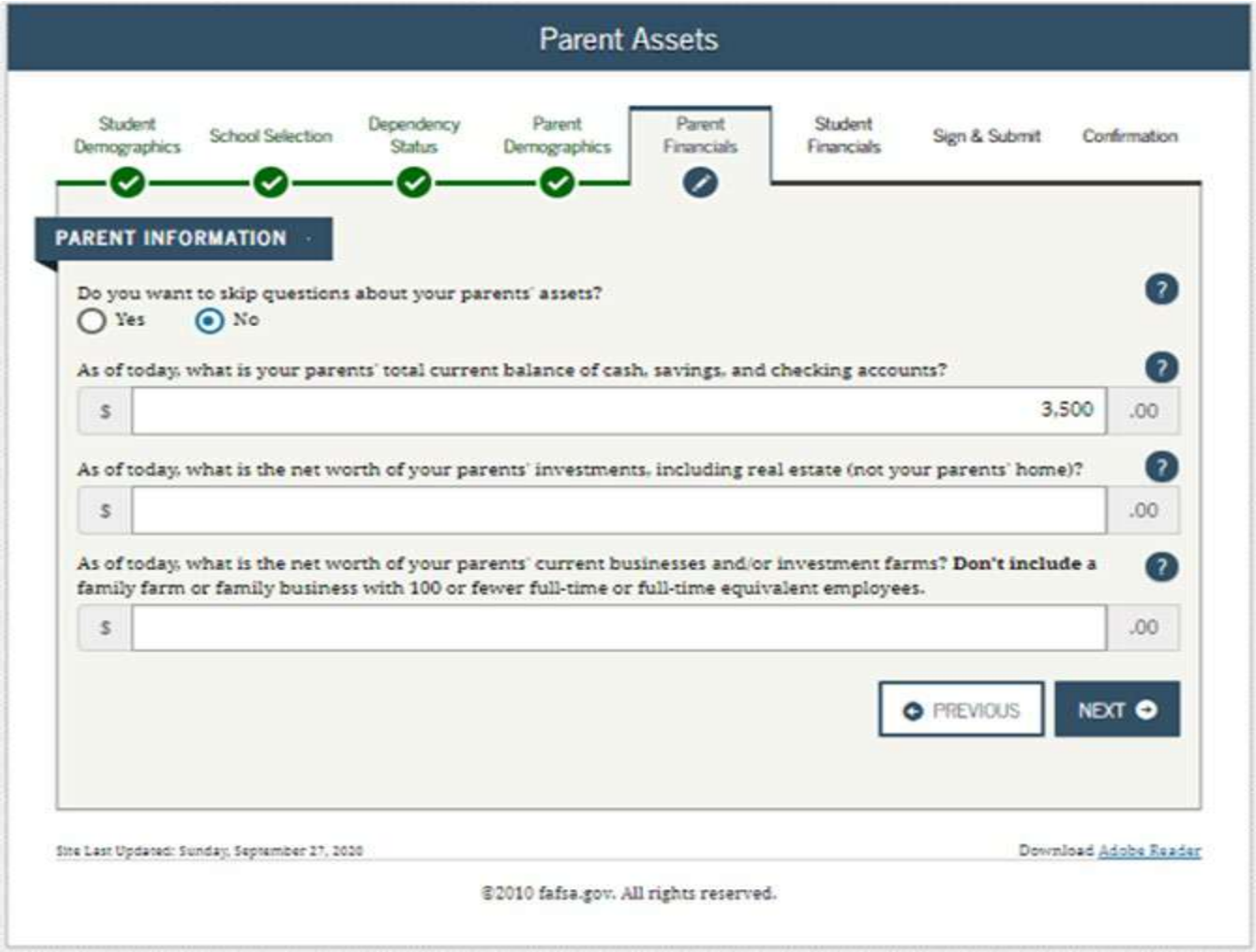


Parent Financials – Parents Assets

Assets include cash, savings and checking accounts, investment accounts such as 529 plans, certificates of deposit, bonds, money market funds, stocks, stock options, mutual funds, trust funds, or rental properties

A business value does not include a family business if the family owns and controls more than 50% and has 100 or less full-time employees.

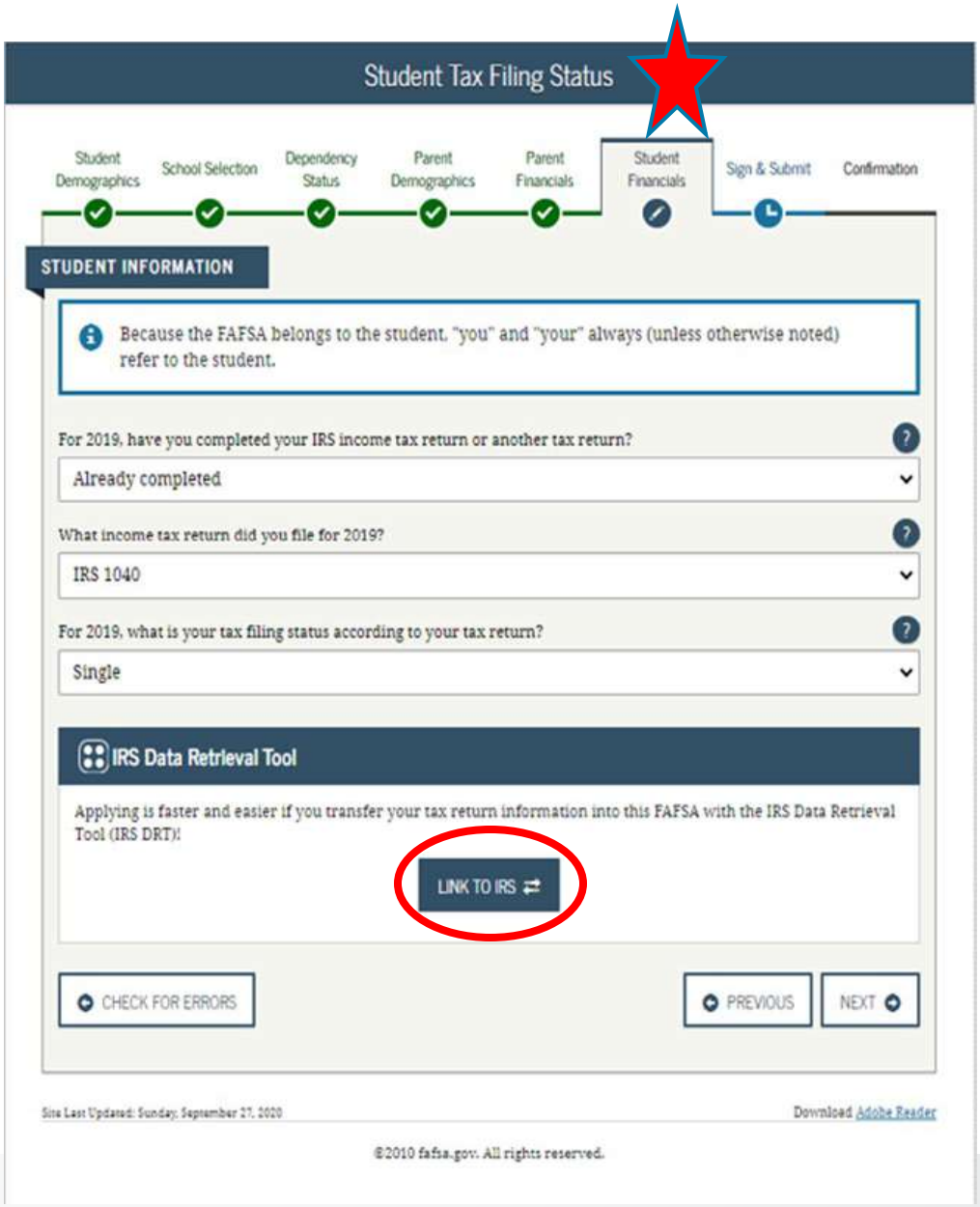
Say yes or no and click Next



Student Financials

Student is presented with same income questions as the parent financials section

If the student filed a tax return, use the IRS DRT to transfer income into the FAFSA

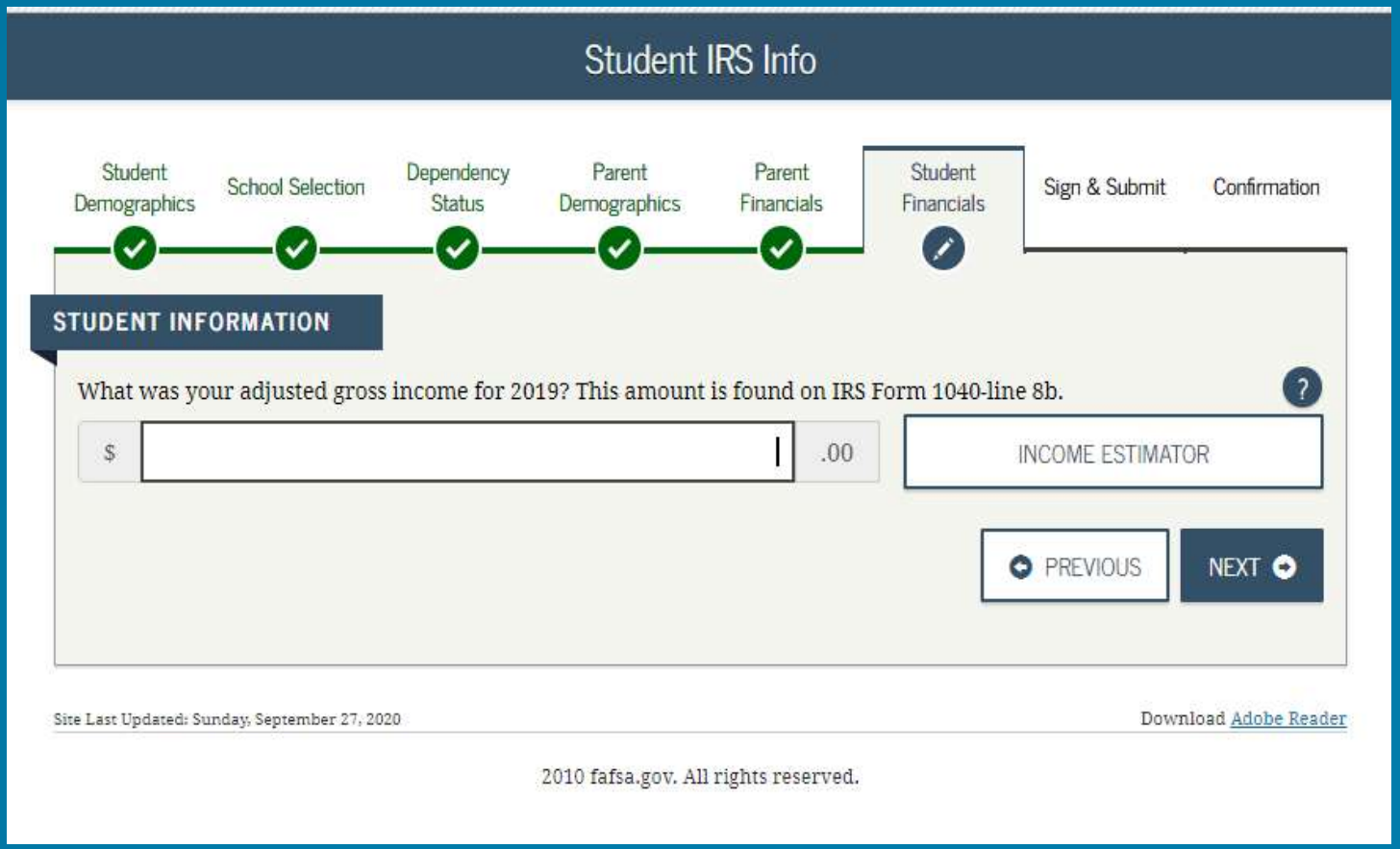


Student Financials

If the student cannot use the IRS DRT, complete the information manually

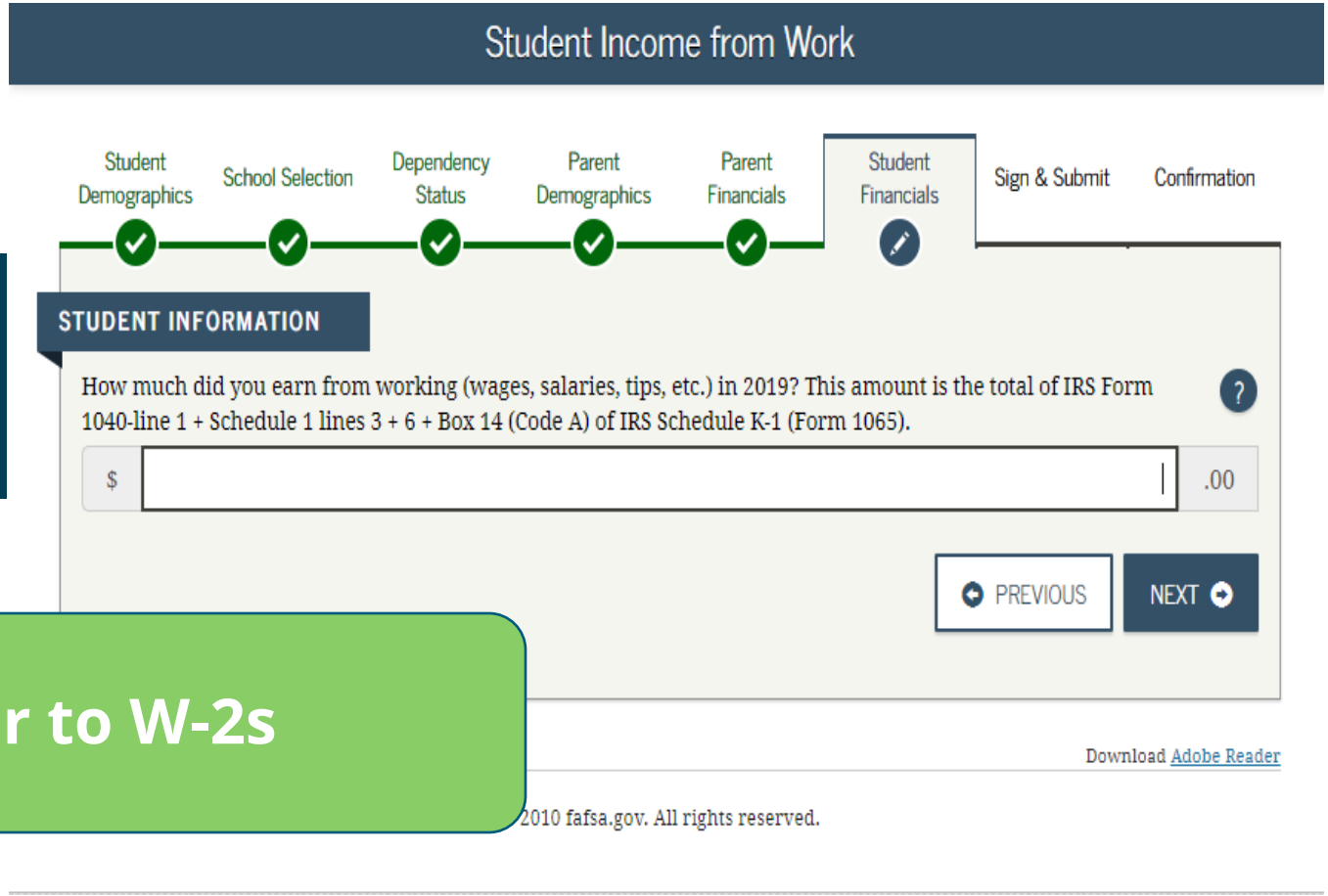
Fill in the AGI – it will tell you what line to take it off of the tax return

Click Next



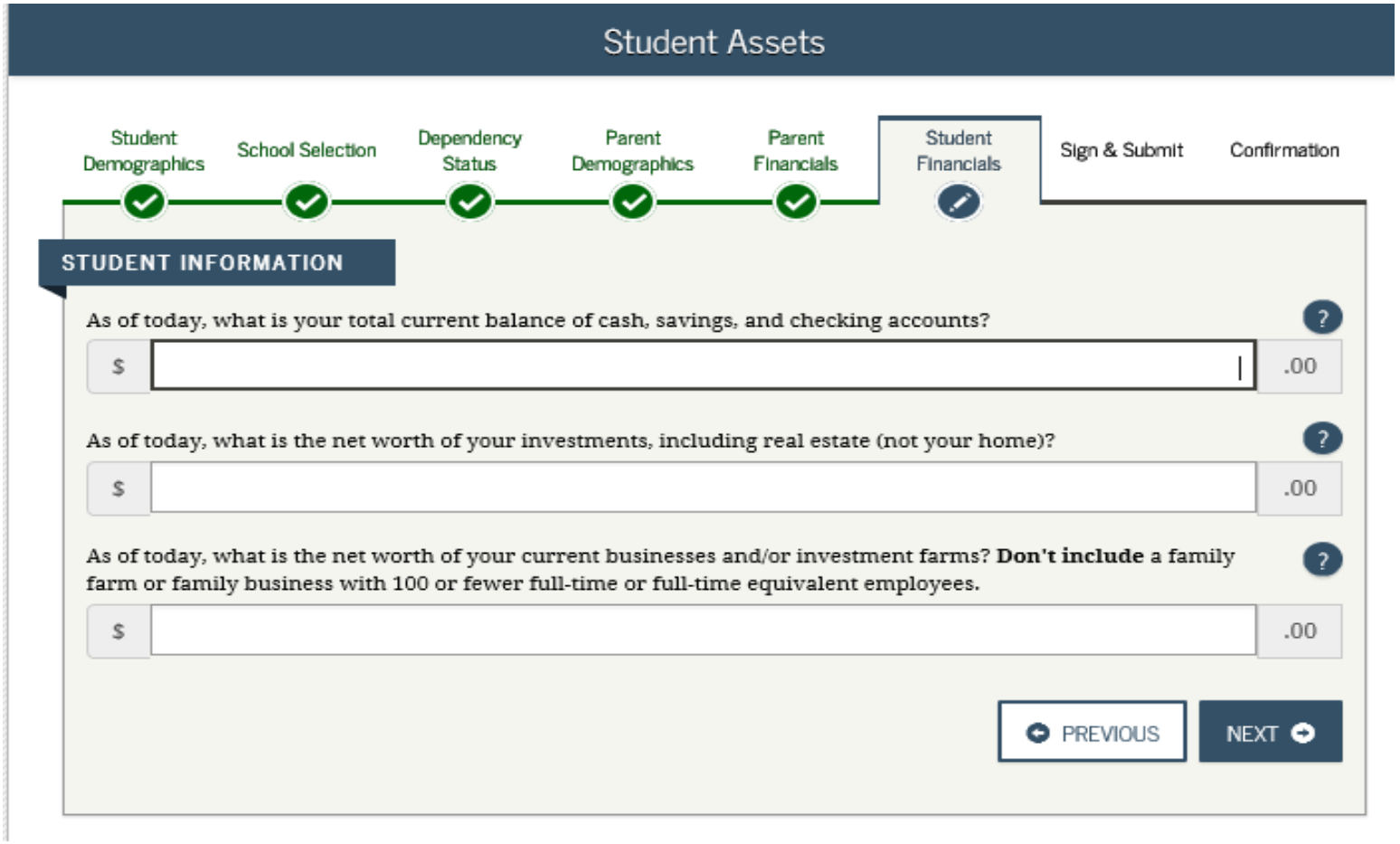
Student Financials

Student income earned from work

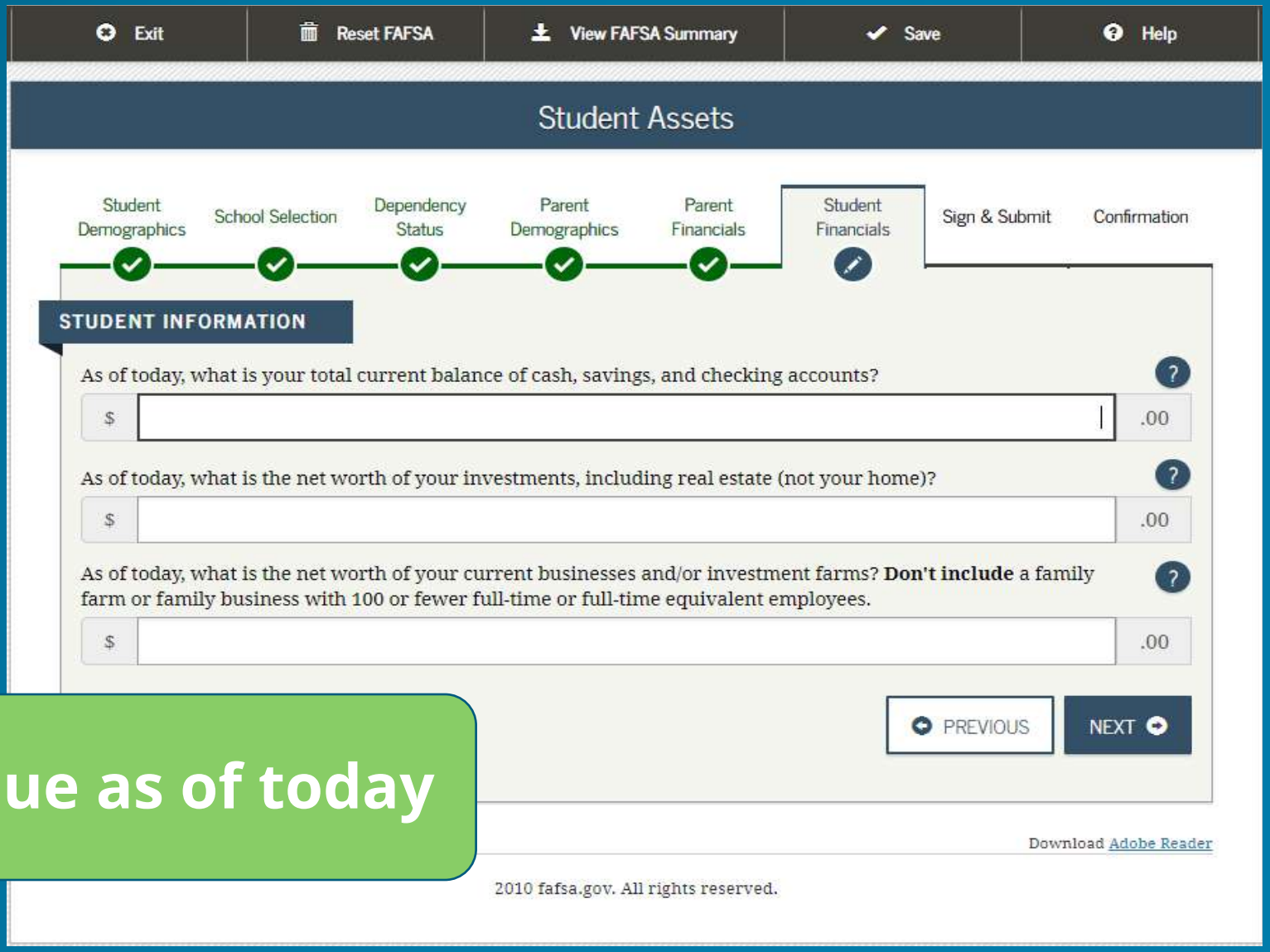


Refer to W-2s

Student Financials – Student Assets

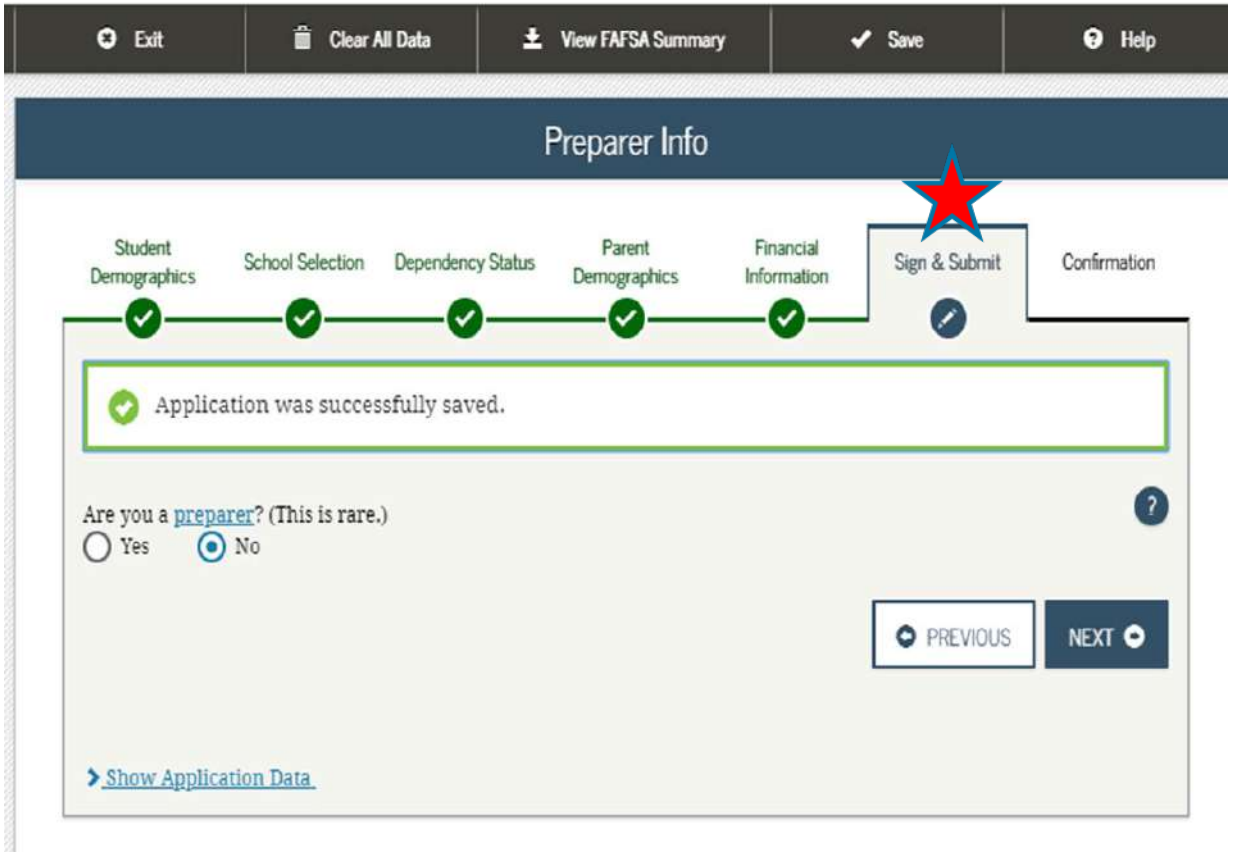


Student Financials – Student Assets



Value as of today

Sign & Submit



A preparer is someone you pay to complete your FAFSA – answer no in most cases

Click Next

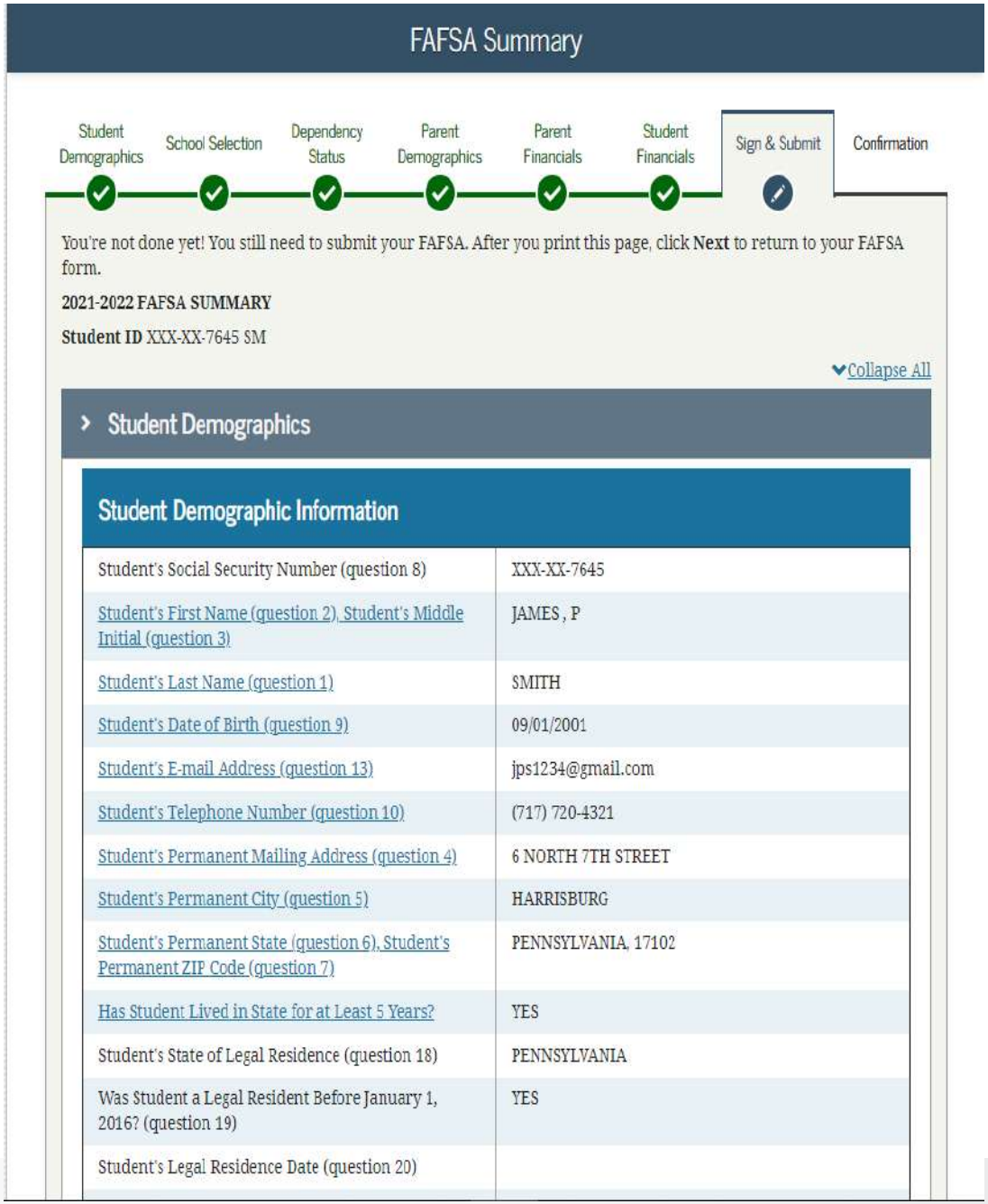
Sign & Submit

FAFSA Summary

Families can review the information listed

May print but really no need to as you will get a Student Aid Report after submitting the FAFSA with the information

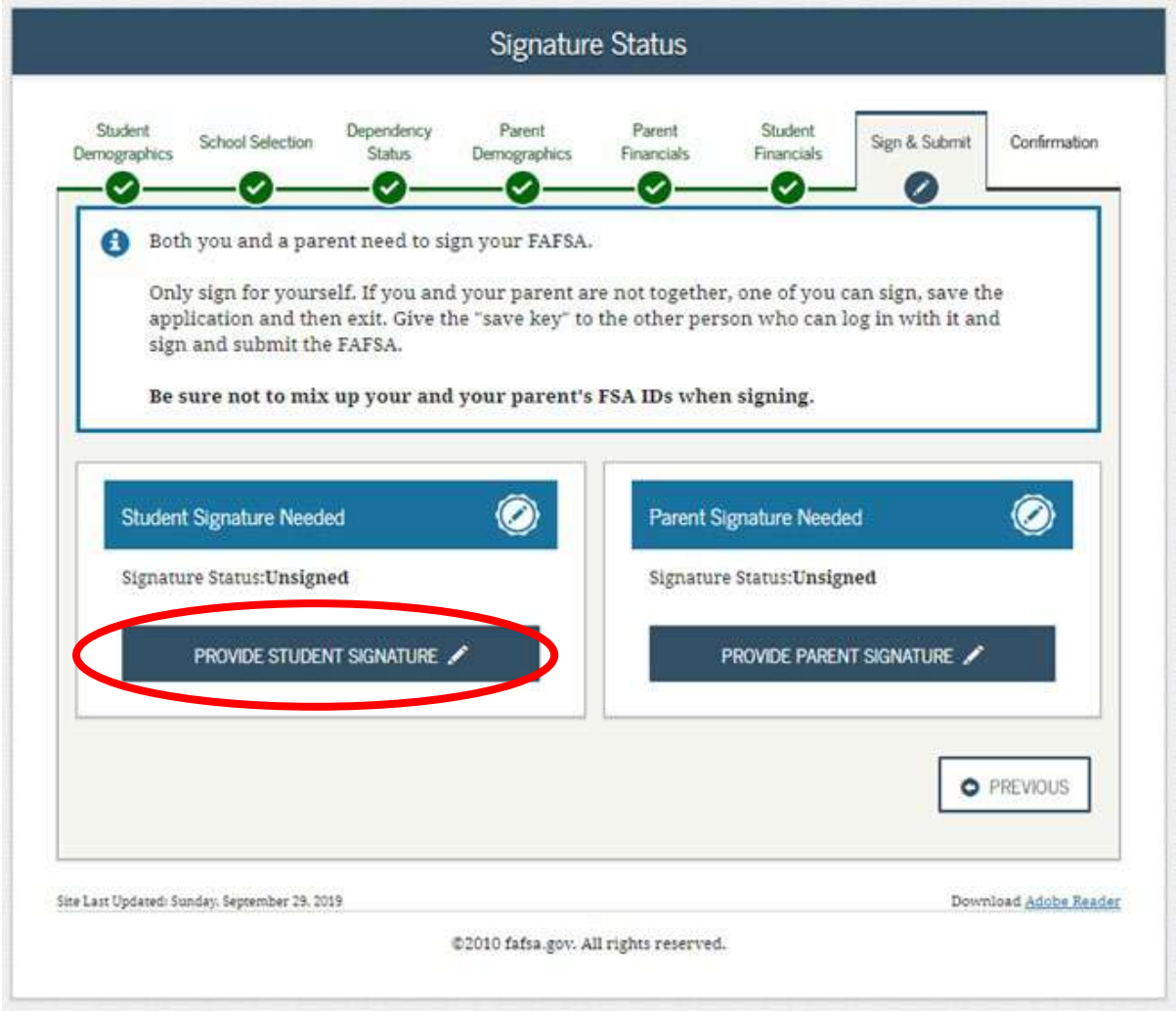
Click Next



Sign & Submit

Signatures

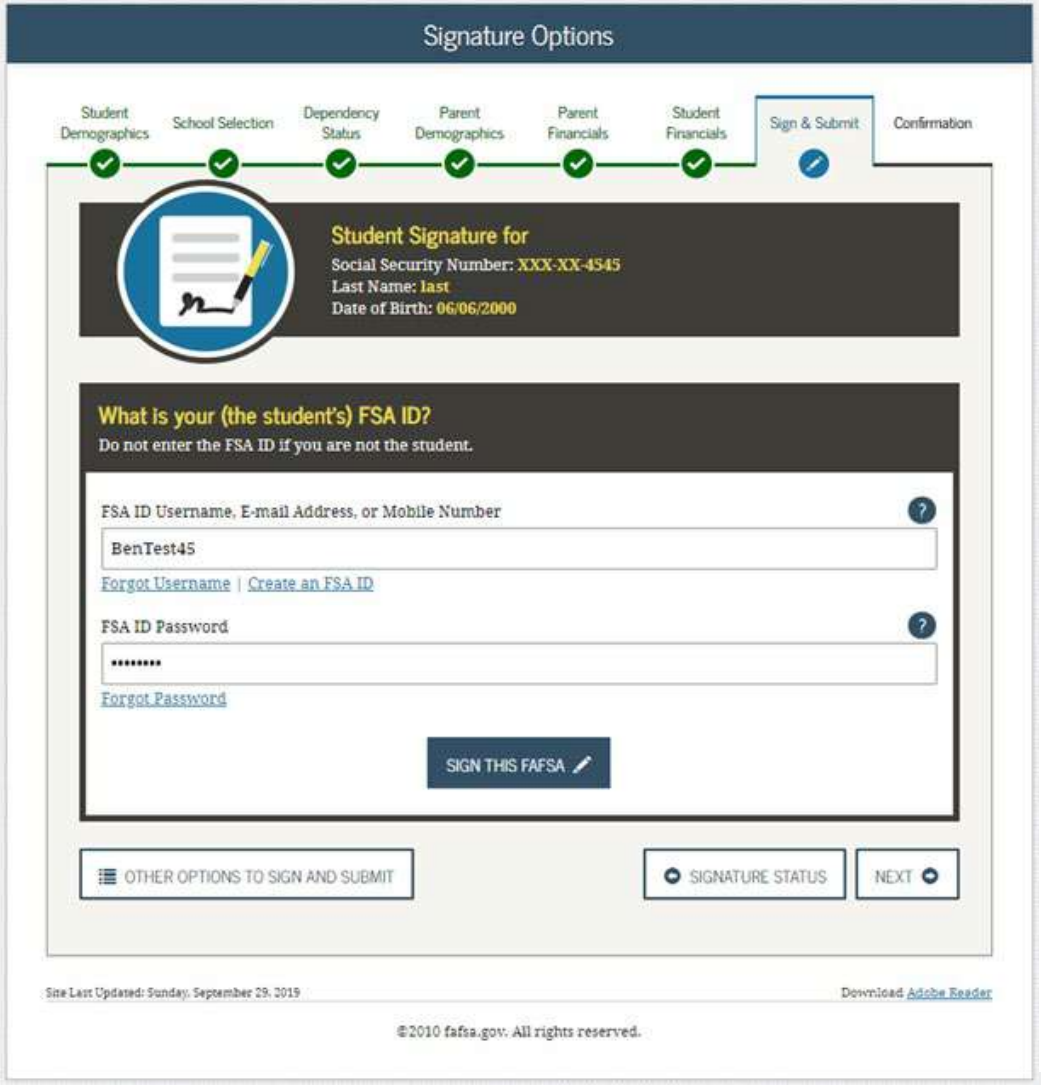
Student signature should be okay if signed in with FSA ID



Sign & Submit

Student will sign using FSA ID.

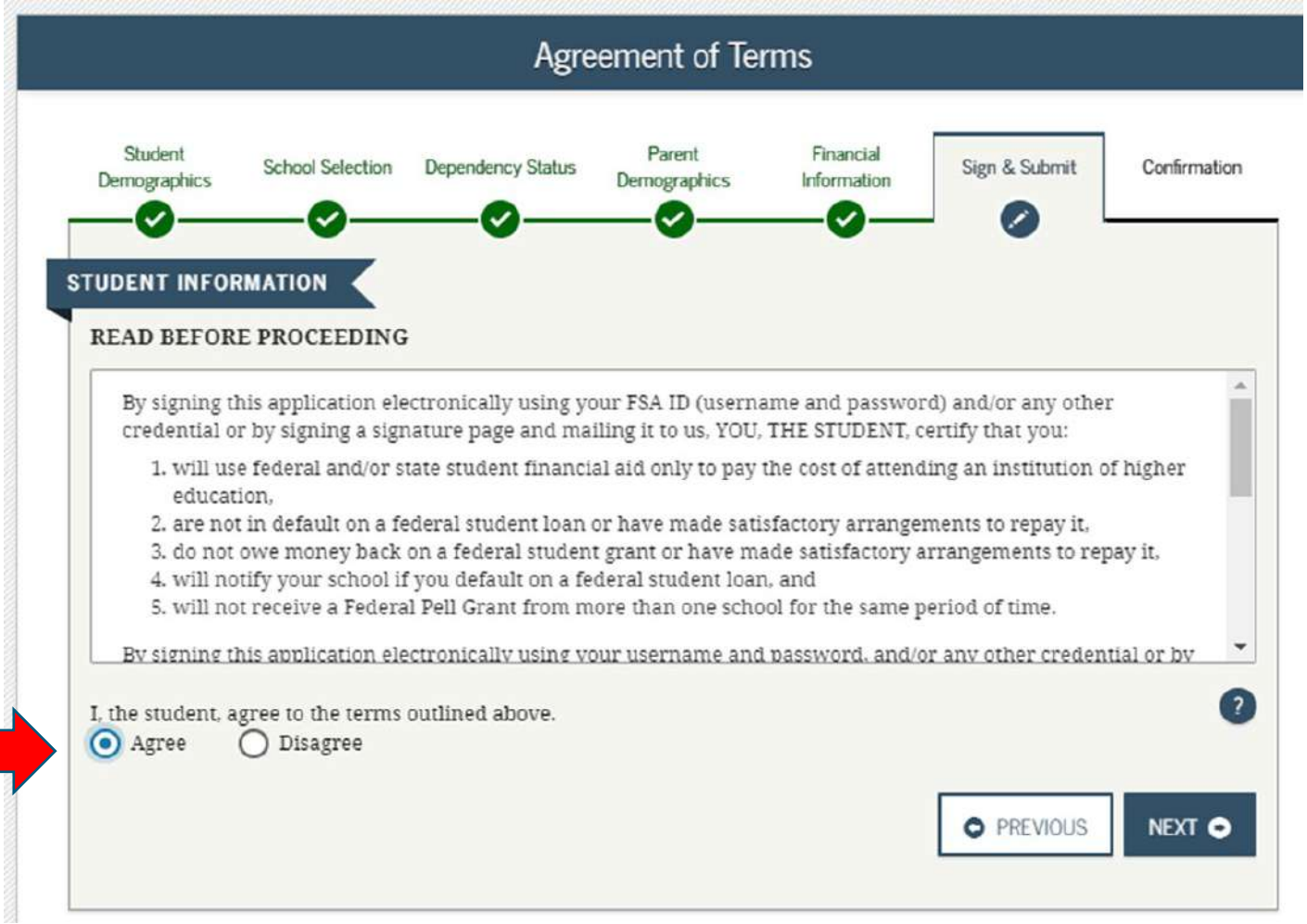
If student logged in using FSA ID or used FSA ID for IRS DRT the student will not need to provide it again



Sign & Submit

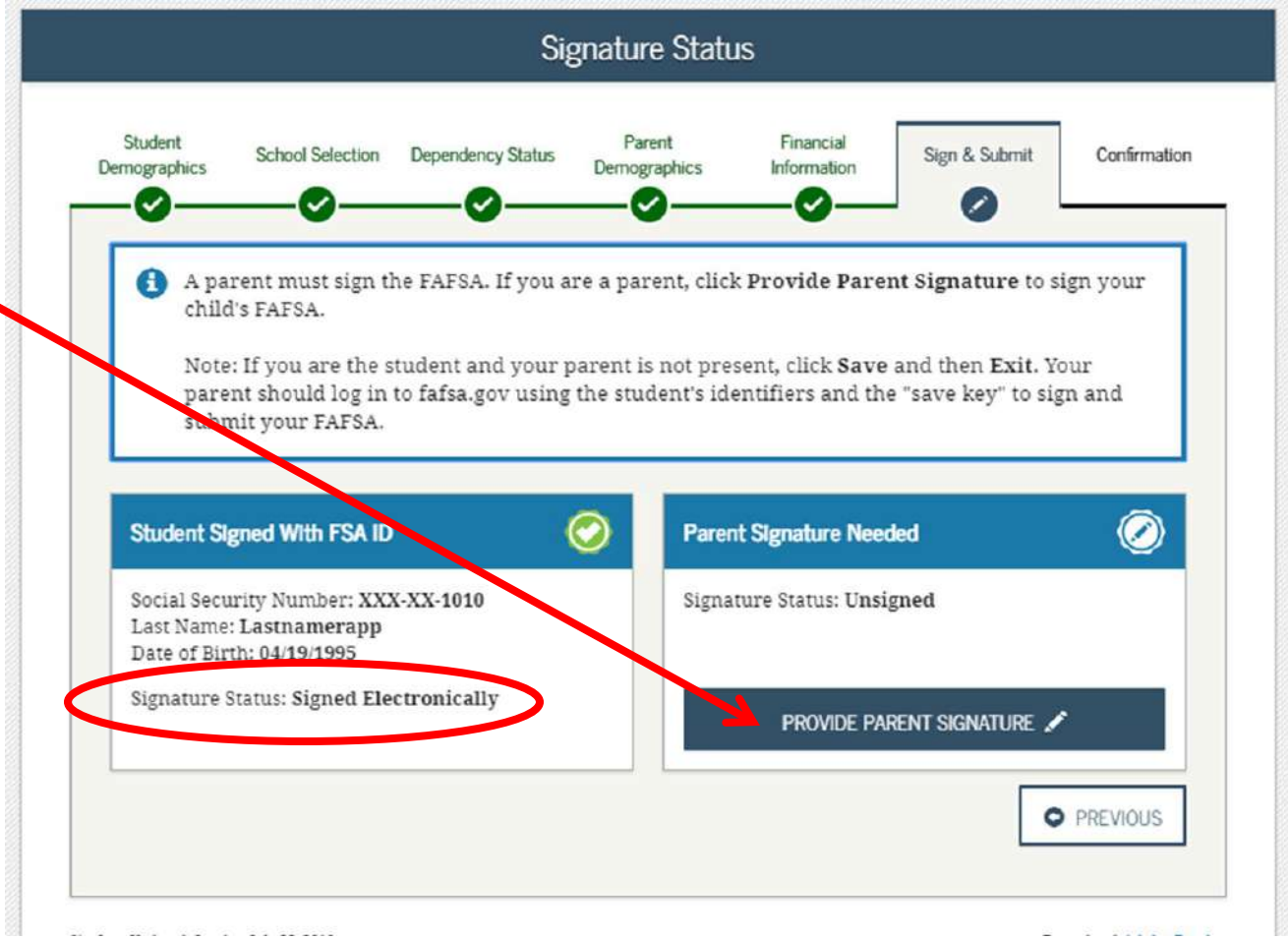
Must Read and Agree to Terms

Click Next



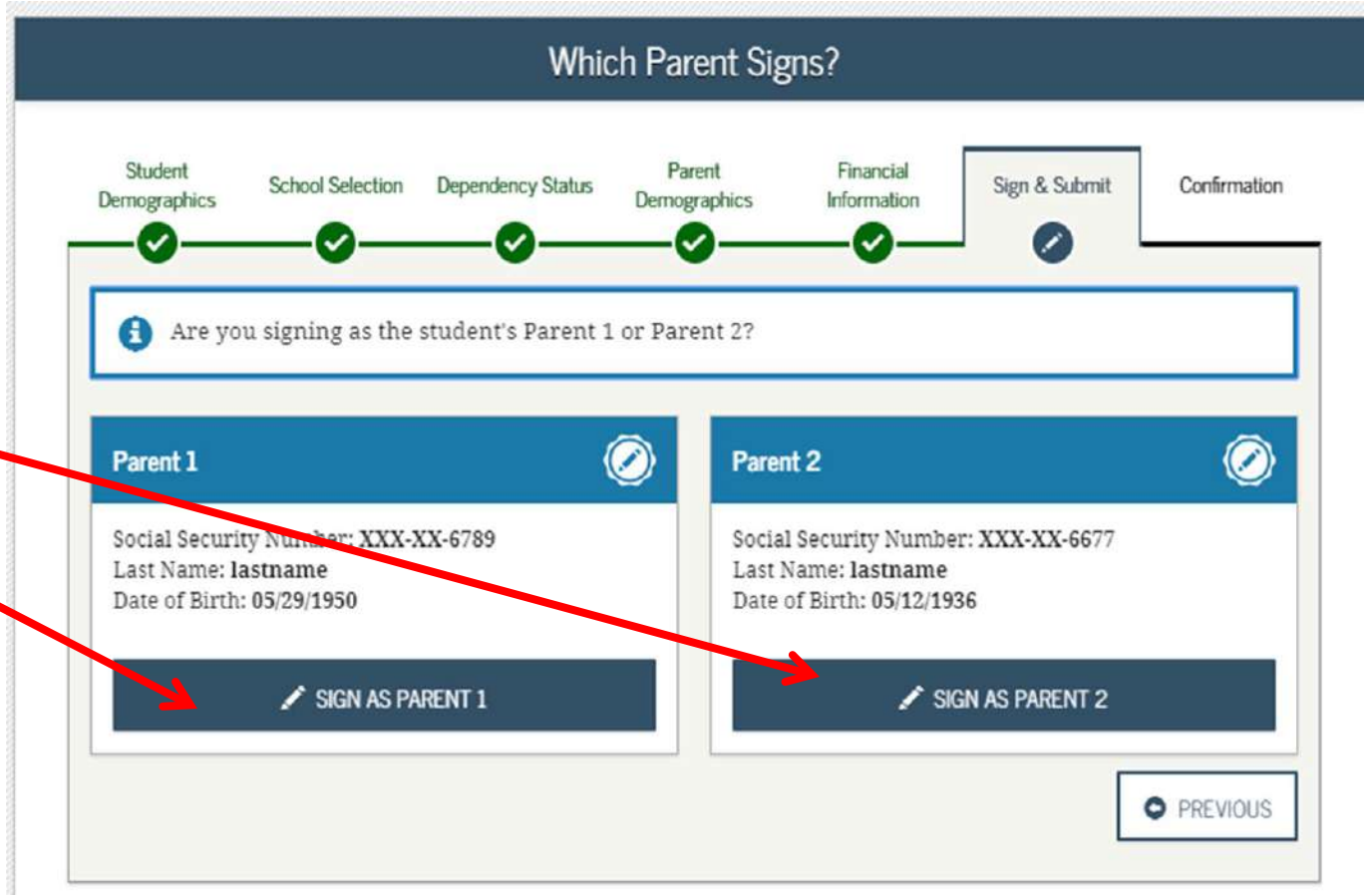
Sign & Submit Parent

Click on Provide Parent Signature



Sign & Submit

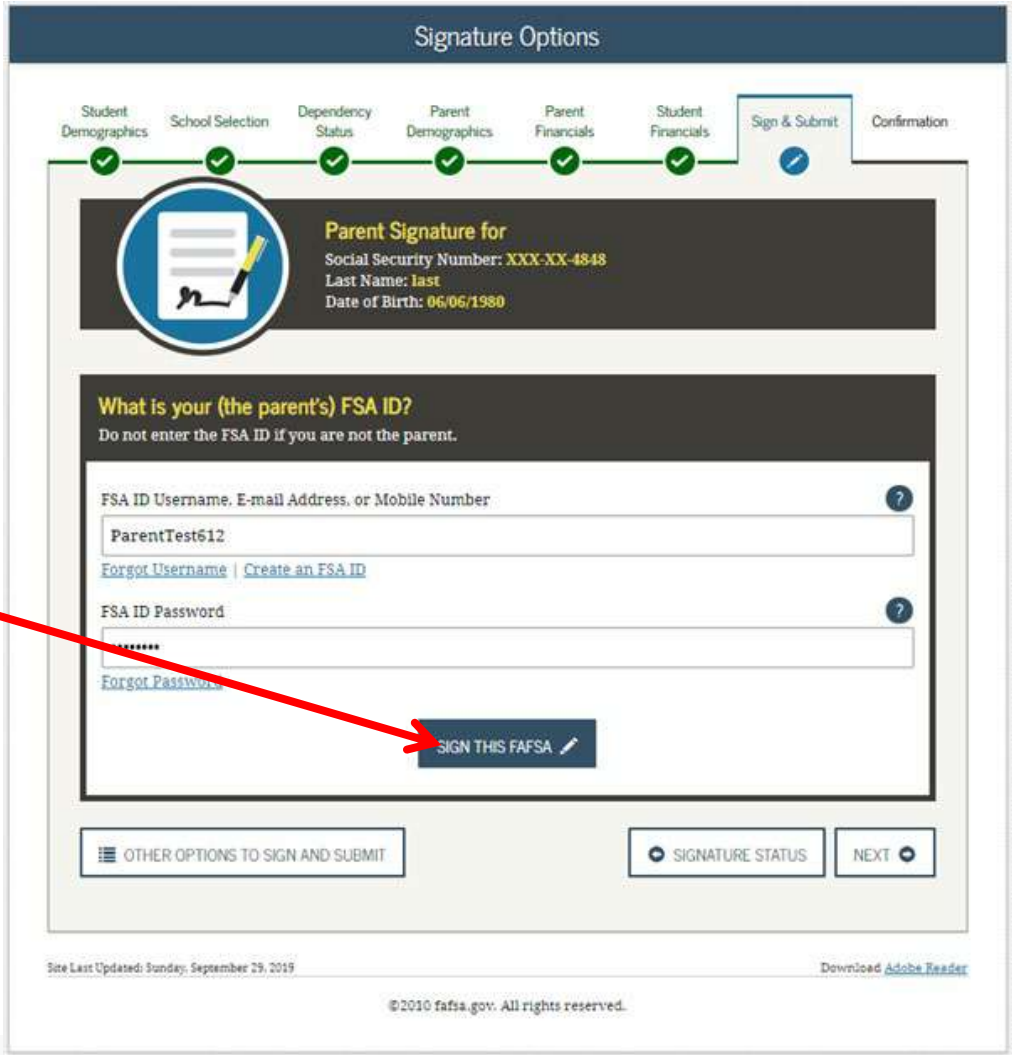
Which parent has the FSA ID? Parent 1 or 2?



Sign & Submit

Parent will sign using FSA ID

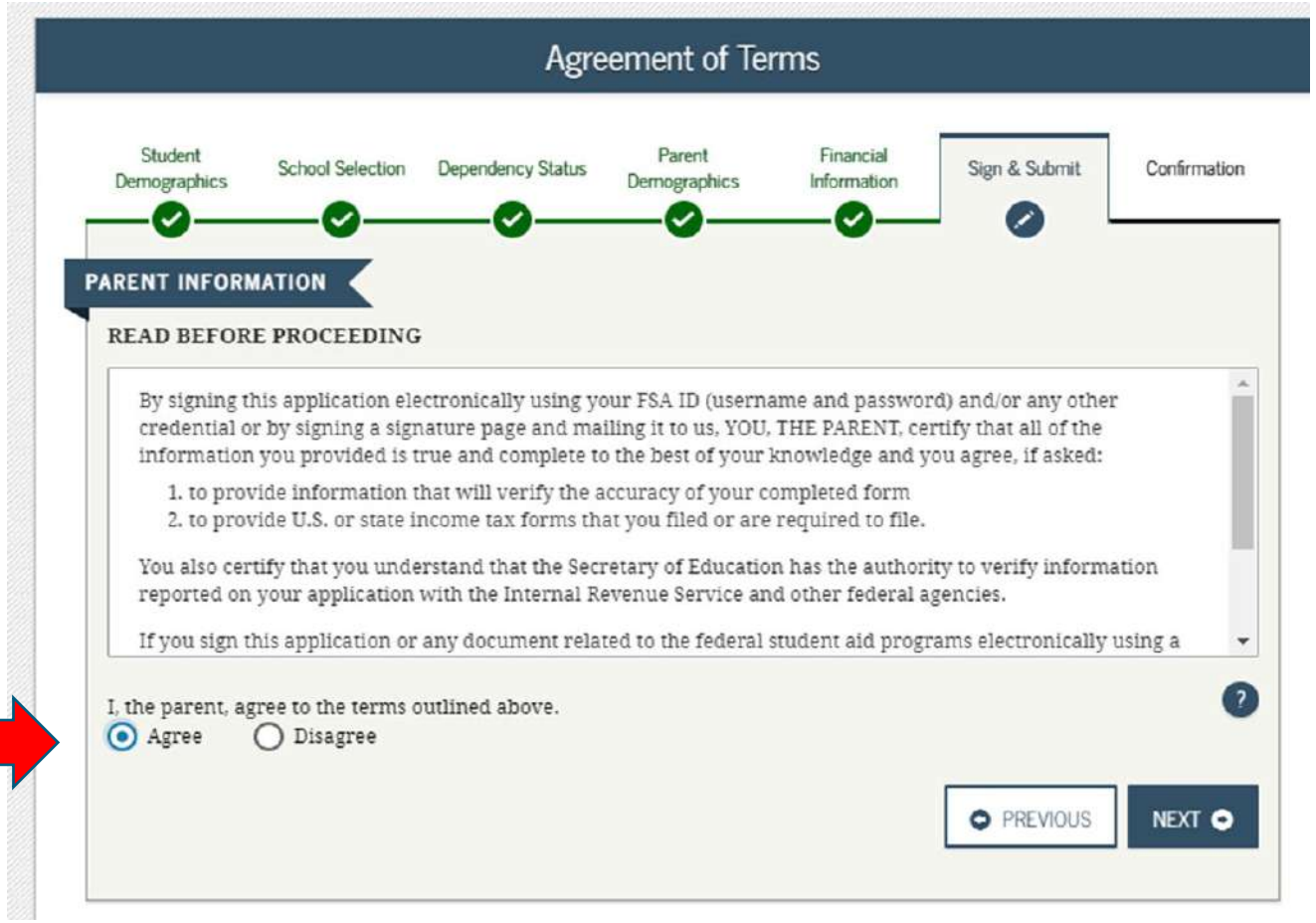
Click sign this FAFSA



Sign & Submit

Parent must Read and Agree to Terms

Click Next

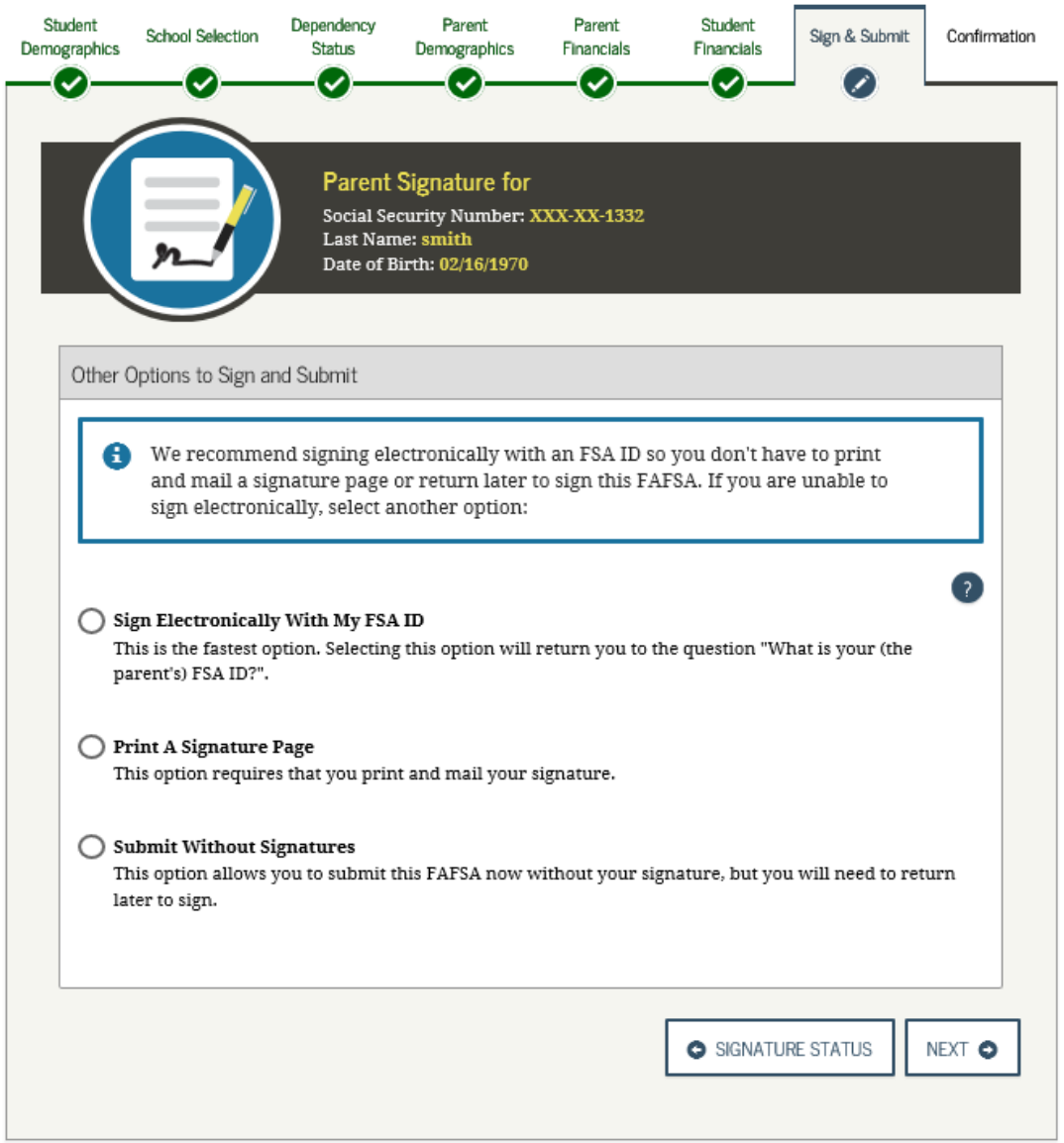


Other Options to Sign and Submit

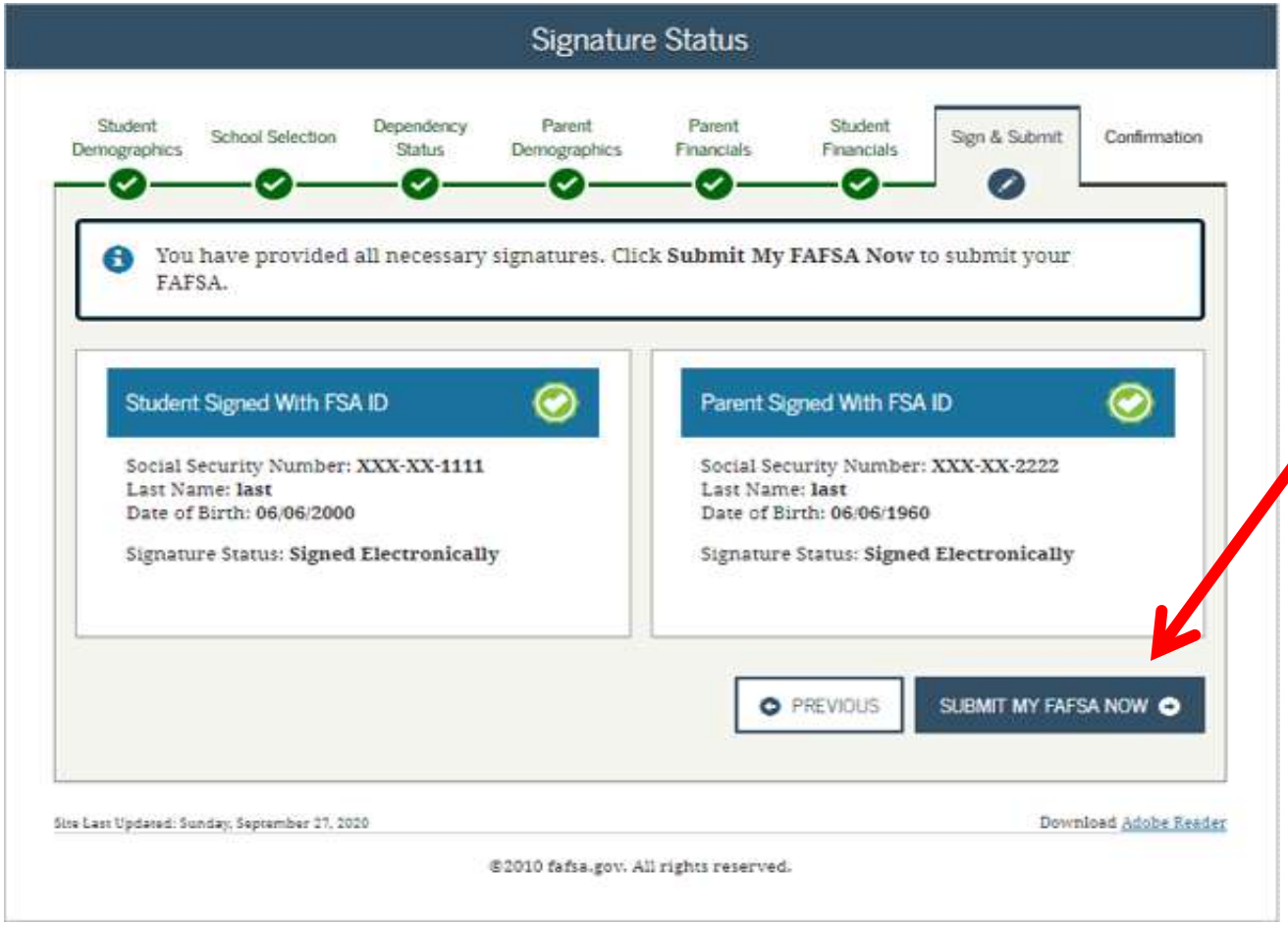
Recommend that you sign with FSA ID.

You can print a signature page and mail.

Submit without Signatures – you will have to return later to sign. The FAFSA will not be processed until signatures are provided.



Sign & Submit



Will get a message that all signatures were provided

Click on Submit My FAFSA Now

FAFSA information will be sent to the U.S. Department of Education FSA for processing.

Confirmation Page

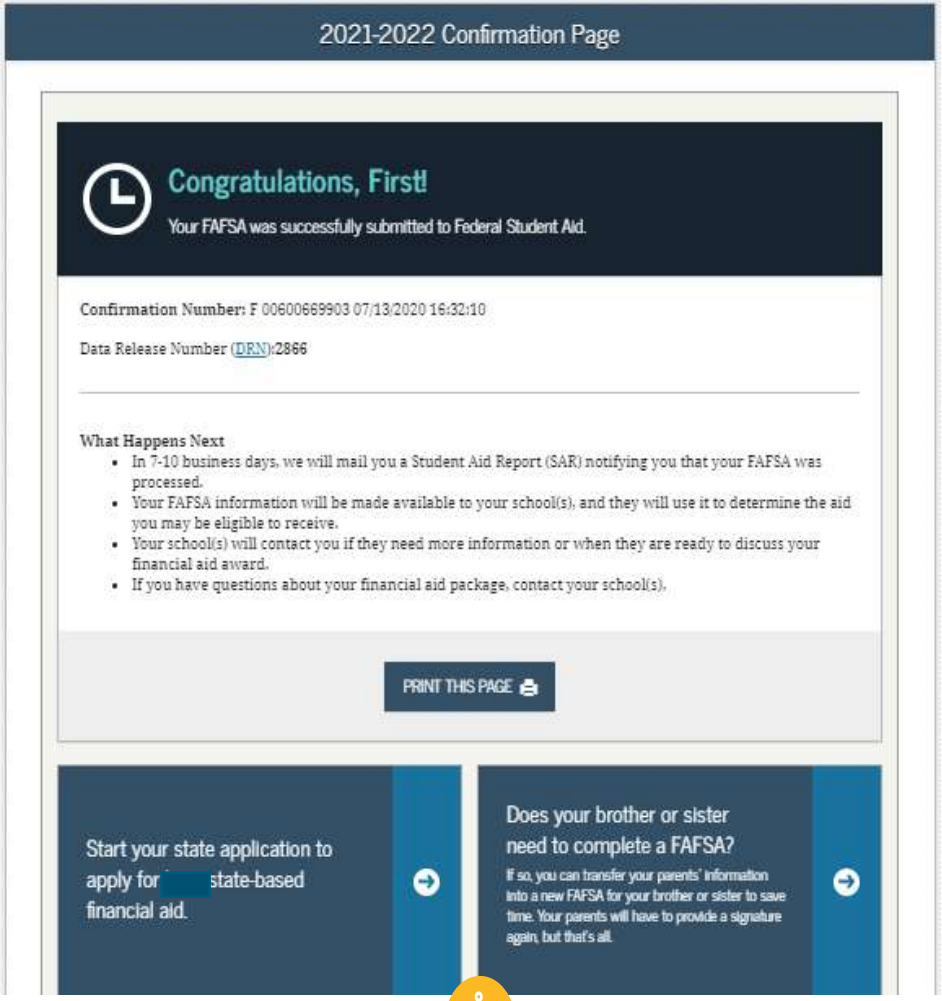
Printing recommended

Will list EFC , Federal Pell grant and federal student loan eligibility and amounts

Links to all schools listed on the FAFSA

Option to complete PA state grant form (SGF)

Sibling FAFSA link to transfer parent information



If the FAFSA is completed on a device which does not allow pop-ups, then the link from the FAFSA Confirmation Page will not work for accessing the SGF. Applicants should allow or enable pop-ups from studentaid.gov prior to completing the FAFSA, to ensure access to the SGF via the FAFSA link.

Completing your PA State Grant Form

Pennsylvania State Grant Form 2021-22

Getting Started

As the Student applying for a Pennsylvania State Grant, here's some information that you'll want to have ready.

- If applicable, the **month and year** your diploma was received (for High School or GED).
- If married, your spouse's 9-digit **Social Security Number**.
- If you have a savings account through **PA 529**, you may need a recent account statement for the total savings, or visit pa529.com.
- **Adobe Reader** is required to view and print your PA State Grant Form. The plug-in is available as a free download from Adobe.

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What Happens Next?

FAFSA

- Student completes the FAFSA

Schools

- Receive FAFSA results and check for eligibility for financial aid

Financial Aid Notifications

- Schools send to students

Special Circumstances

If things change....*contact the Financial Aid Office*

- Divorced or separated parents
- Recent death or disability
- Unemployment
- Reduced income

✓**Contact PHEAA for PA State Grant reconsideration**

The Plan

- Submit your FAFSA prior to school deadline
- Work hard on scholarship search
- Understand your costs
- Compare financial aid offers
- Think of your future

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