

# UNDERSTANDING FINANCIAL AID

## FAFSA Steps to complete the free application for federal student aid



### TIPS FOR SUCCESS

#### 1. Gather important documents to complete the FAFSA:

- You and your parents' full names, dates of birth, and addresses
- You and your parents' Social Security Numbers
- Your Driver's License number if you have one
- Your Alien Registration Number if you are not a U.S. citizen
- Federal tax information (tax return from two years prior).
  - Correct year tax return (IRS 1040, 1040A, or 1040EZ depending on what form you or your parents filed) including IRS W-2 information;

I'm a student this academic year...	Planning to use Federal Student Aid for this academic year... <i>(matches the FAFSA Application I'll fill out)</i>	So, I'll need this tax year information...	When the FAFSA opens on:
2018-19	2019-20	2017	October 1, 2018
2019-20	2020-21	2018	October 1, 2019
2020-21	2021-22	2019	October 1, 2020

- Foreign tax returns if applicable;
- Tax return for Puerto Rico, Guam, American Samoa, The U.S. Virgin Islands, the Federated States of Micronesia, or Palau if applicable
- Information on cash, savings and checking account balances; investments held, including stocks and bonds, and real estate (but not including the home in which you live), and business and farm assets for you and your parents.

#### 2. Visit [FAFSA.gov](https://fafsa.gov), click [Start Here to begin](#), or [Log In as a returning user](#).

#### 3. Obtain an FSA ID for student and an FSA ID for one parent.

- Helpful hint: don't use a school email address

#### 4. Complete the FAFSA online through either the desktop or myStudentAid mobile app

*(Available for Android and Apple devices)*

- Helpful hint: Don't answer a call or text... you'll have to start over
- Helpful hint: IRS Data Retrieval-When trying to connect to the IRS data retrieval tool using your FSA ID, **do not exceed more than three times of incorrectly entering the information**. The fourth try will lock the account, and you will need to call 1-800-4FED-Aid

#### 5. Sign the FAFSA:

- Electronic Signature: Use FSA IDs to electronically sign the FAFSA application
- Verify FSA ID account.
- Print Signature Page **only** if **unable to use your** FSA ID.  
If you and/or your parent are unable to use your FSA-ID to electronically sign the FAFSA, you will be required to print a signature page at the end of the FAFSA before submitting. You and/or your parent should sign and mail in the Signature Page.

#### 6. If your FAFSA is selected for verification, don't panic.

You just need to follow-up with the individual college or university for a few more steps.



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