# File Your 2017-2018 FAFSA NOW

Office of Financial Aid

American University

### Good News

Filing your Free Application for Federal Student Aid (FAFSA) has never been easier.

This presentation will provide a step by step tutorial on:

- Identifying which FAFSA to complete
- Using the Data Retrieval Tool
- Electronically Signing the FAFSA

### Filing the FAFSA

- Both Student and Parent (custodial) parent must obtain an FSA ID to sign the FAFSA electronically
  - If you already have one great! You can use your current one.
- If you need a FSA ID go to fsaid.ed.gov
- You will need a Social Security Number to obtain and FSA ID otherwise you will be required to print sign and mail the student and parent(s) signatures.

#### OBTAINING AN FSA ID

The FSA ID process consists of the following steps:

- 1. Enter your log-in information.
- 2. Provide your e-mail address, a unique username, and password, and verify that you are at least 13 years old.
- 3. Enter your personal information to include:
  - Provide your Social Security number, name, and date of birth.
  - Include your mailing address, e-mail address, telephone number, and language preference.
  - For security purposes, provide answers to five challenge questions.
- 4. Submit your FSA ID information.
- 5. Agree to the terms and conditions.
- 6. Verify your e-mail address
  - By verifying your e-mail address, you can use your e-mail address as your username when logging into certain ED websites. This verification also allows you to retrieve your username or reset your password without answering challenge questions.)



#### Which One? There are two FAFSA options listed

e Help	Welcome,	Logout
Get Started		
Welcome, Shirleyn	e McDonald!	
Fill out your FAFSA To receive federal st	(Free Application for Fede udent financial aid, you need	leral Student Aid)! d to fill out a FAFSA every school year. Let's get started.
For which scho	oi year are you appiy	ying for financial aid?
2017-2018 scho	ool year	START 2017-2018 FAFSA
	-	
2016-2017 scho	ool vear	START 2016-2017 FAFSA
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are planning to	attend.	r just don't know which application to complete, check with the college you
FSA ID		Last Time, Date FSA ID Used: 2:16, 10/04/2
FSA ID Status:		
User Account Manage	ment	

### Enter a Save Key

	Ce of the U.S. DEPARTMENT of EDUCATION PROUD SPONSOR of the AMERICAN MIND*	ree Application	FAFSA <sup>®</sup> for Federal Student Aid
Ho	Image: Specific descent and the		SEARCH
	Start Your 2017-2018 FAFSA		Help and Hints
S T U	Create a Save Key. The Save Key is for temporary use for you or your parent to return and conspecific FAFSA. Create a Save Key Re-enter Save Key	form Approved JMB No. 1845-0001 App. Exp. 12/31/2018 mplete this	Create a Save Key You must create a save key. The save key allows you to return to an application or correction later if you need to stop and save your work. It also allows you to share access to your application or correction if your parent needs to add information or sign.
DENT	NEED HELP?	MY FAFSA	The save key must be between 4 and 8 characters long. You can use any combination of numbers and / or uppercase and lowercase letters. For example, the save key "Student2" is different than the save key "STUDeNt2." Try to choose a save key that you can remember but that would be hard for others
Site Last	Updsted: Sunday, September 25, 2016		Download Adobe Reader

### Student Demographic Data

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L	Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
	Student Den	in ographic I	Information	Your middle ir	nitial	Help Student Q You must e for your pe address. For Mexico, Provinces, o outside the 00000 for th	and Hints s Permanent ZIP Code uestion 7 Inter the ZIP code rmanent mailing Canadian or another address United States, enter the ZIP code.
	What is your mar Select	rital status as of t	oday? mation that you wan	it to provide?			

#### Student Financial Data

Did the student file 2015 taxes?

Required to file if:

- Earned \$6300 or more during 2015?
- Had unearned income of \$1050 or more?

If yes, complete the Data Retrieval Tool



### Link to IRS Data

Federal Student Aid An OFFICE of the U.S. DEPARTMENT OF EDUCATION PROUD SPONSOR of the AMERICAN MIND*					Free Applicati	ion for Feder	FAFSA <sup>®</sup> ral Student Aid
	<b>?</b> Help						SEARCH
	Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
STUDENT	Leaving FAFSA You are now leav FAFSA information Your saved FAFS FAFSA on the W from the IRS Well Click Proceed to If you have any o	on the Web ring FAFSA on th on will be saved. SA will automatic: 'eb from the IRS 'i b site, you will ha b IRS Site to cont questions or probl	e Web and will be t ally open either whe Web site. If you do r ve to log in to open inue. Otherwise, clic ems using this tool, SKIP IRS TRA	ransferred to the IR on you transfer your not transfer your info your saved FAFSA. ck <b>Skip IRS Transfe</b> view available <u>Help</u> NSFER PROCEE	S Web site to acces information from the ormation or choose er. a options for assistan D TO IRS SITE	e IRS or choose to not to return to FA	ormation. Your o return to AFSA on the Web

#### Review

MIRS and	Return to FAFSA   Log Out   Help				
	<u>Español</u>				
Get My Federal Income Tax Informati	on				
See our <u>Privacy Notice</u> regarding our request for your personal ir	nformation.				
Enter the following information from your 201	5 Federal Income Tax Return. 😢 Required fields *				
First Name *					
Last Name *					
Social Security Number *	*** _** _				
Date of Birth *					
Filing Status * 😯	Single •				
Address - Must match your 2015 Federal Income Tax Return.					
Street Address *					
P.O. Box (Required if entered on your tax return) 😯					
Apt. Number (Required if entered on your tax return)					
Country *	United States				
City, Town or Post Office *					
State/U.S. Territory *	Select One 🔻				
ZIP Code *					
Select the button below to exit the IRS system and return to your FAFSA.	By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.				
Return to FAFSA	Submit				

### Transfer IRS Data to FAFSA

#### Student 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers 🕐
Tax Year	2015	
Name(s)		
Social Security Number	*** - ** -	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040A	Question 33 on the FAFSA
Adjusted Gross Income		Question 36 on the FAFSA
Income Earned From Work 🕜		Question 39 on the FAFSA
Income Tax		Question 37 on the FAFSA
IRS Exemptions		Question 38 on the FAFSA
Education Credits		Question 44a on the FAFSA
IRA Deductions and Payments		Question 45b on the FAFSA
Tax-Exempt Interest Income		Question 45d on the FAFSA
Untaxed IRA Distributions 🕜		Question 45e on the FAFSA
Untaxed Pensions 📀		Question 45f on the FAFSA

Print this page for your records before choosing an option below.

#### Transfer My Tax Information into the FAFSA 😯

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

#### Do Not Transfer My Tax Information and Return to the FAFSA 😯

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.



#### **Transfer Confirmation**



### Not Eligible for the Data Retrieval Tool

In some instances students and parents may not be eligible to use the DRT. The most common reasons are:

- -Married parents filed tax returns separately
- -Tax filers amended the 2015 Tax Return
- -Filed a Puerto Rican or a Foreign Tax Return

#### What You Will Need

If you are ineligible to use the Data Retrieval Tool you will be required to manually input the financial data for student and parent(s).

The student and parent(s) will need:

- Financial statements of earnings during the 2015 calendar year
  - W2, Pay Stubs, Employer Compensation statement
  - Bank documents indicating any income interest, assets, dividends
  - Information on properties (not primary residence), investments etc.

## Helpful Tools and Tips

If you are ineligible to use the Data Retrieval Tool you will be required to manually input the financial data for student and parent(s).

Text in the boxes on the right side of the screen:

- Provides information on where the financial data may be located on you financial forms
- Defines unfamiliar terms
- Direct you to additional resources to assist you in completing the FAFSA

### Inputting Parent Financial Data on the FAFSA

	Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
P	Parent Finan What type of inco Select What was your p	ome tax return di	d your parents file f	or 2015?	T	Hel Parents' F Q If your par	p and Hints Type of 2015 Tax orm Used uestion 81 rent uses the IRS
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#### Inputting Parent Financial Data on the FAFSA

Parent Financial Information continued  There the amount of your parents' income tax for 2015. This amount is found on IRS  There your parents' exemptions for 2015. This amount is found on IRS Form 1040-line  add - 00  There your parents have any of the following items in 2015? Check all that apply and provide amounts. <b>2015 Additional Financial Information</b> American Opportunity Tax Credit or Lifetime Learning Tax Credit Child support paid Cooperative education program earnings <b>2015 Untaxed Income</b> Payments to tax-deferred pension and retirement savings plans Cooperative education program earnings <b>2015 Untaxed Income</b> Payments to tax-deferred pension and retirement savings plans RA deductions of IRA distributions Untaxed portions of pensions As of today, does the total amount of your parents' current assets exceed \$28,200.007  (NEWLOW) UNTARESA	Student emographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmat
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### Inputting Student Financial Data on the FAFSA

Student Tax Information         For 2015, have you completed your IRS income tax return or another tax return?         Select         PREVIOUS         NEED HELP?         SAVE         CLEAR ALL DATA         VIEW FAFSA SUMMARY         EXIT		Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
For 2015, have you completed your IRS income tax return or another tax return?       Student Filed 2015 Income Tax Return?         Select <ul> <li>PREVIOUS</li> <li>NEXT</li> <li>NEED HELP?</li> <li>SAVE</li> <li>CLEAR ALL DATA</li> <li>VIEW FAFSA SUMMARY</li> <li>EXIT</li> <li>Student Filed 2015 Income Tax Return?</li> <li>Question 32</li> <li>You must select the answer that describes your tax filing status:</li> <li>Already completed</li> <li>Will file</li> <li>Not going to file</li> <li>If you indicate you "Will file" a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income, use your 2014 income is similar to your 2014 income is shout your income. If your income is not similar, click Income</li> <li>For an of similar, click Income</li> <li>Come State Sta</li></ul>		Student Tax	Informatio	n			Help	and Hints
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Site Last Updated: Sunday, September 25, 2016 Download Adobe Rea	Site Last	Updated: Sunday, Septem	nber 25. 2016				$\square$	Download Adobe Reader

# Even if the student did not file (s)he, will be asked answer additional financial questions

### Inputting Student Financial Data on the FAFSA

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
Student Fina	ancial Infor	mation			Help	and Hints
What income tax Select What was your ac \$ How much did yo \$	return did you fil djusted gross ind .00 INCO u earn from wor .00	e for 2015? come for 2015? DME ESTIMATOR king (wages, salari	es, tips, etc.) in 2019	• 5? NEXT	Student's T For Que If you use th Retrieval To your inform IRS into you answer to th be pre-filled as "Transfer IRS."	Type of 2015 Tax m Used estion 33 the IRS Data tool and transfer ation from the the FAFSA, the his question will and identified tred from the
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#### Inputting Student Financial Data on the FAFSA

#### Student Financial Information continued

Enter the amount of your income tax for 2015. This amount is found on IRS Form 1040-lines (56 minus 46).

Enter your exemptions for 2015. This amount is found on IRS Form 1040-line 6d.

Did you have any of the following items in 2015? Check all that apply and provide amounts.

- 2015 Additional Financial Information
  - American Opportunity Tax Credit or Lifetime Learning Tax Credit
  - Child support paid

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- Taxable earnings from Work-study, Assistantships or Fellowships
- College grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

#### - 2015 Untaxed Income

- Payments to tax-deferred pension and retirement savings plans
- IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- Child support received
- Tax exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pensions
- Housing, food, and other living allowances paid to military, clergy, and others
- Veterans noneducation benefits
- Other untaxed income not reported such as workers' compensation or disability benefits
- Money received or paid on your behalf

As of today, what is your total current balance of cash, savings, and checking accounts?

As of today, what is the net worth of your investments, including real estate (not your home)?

As of today, what is the net worth of your 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.

#### Help and Hints

Student's 2015 U.S. Income Tax Paid Question 37

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, enter your total tax amount for 2015.

This information may be on the following forms:

IRS Form 1040 – Subtract line 46 from line 56 and enter the total

IRS Form 1040A – Subtract line 38 from line

#### Signing the FAFSA with FSA ID

Sign & Submit		Help and Hints
	—	Are you a preparer?
<ul> <li>Application was successfully saved.</li> </ul>		A preparer is anyone who charges a fee for helping you fill out your FAFSA. If a fee was
VIEW OR PRINT YOUR FAFSA INFORMATION		paid to someone for advice or for completing this form, that person must complete this
⊖ Yes ● No		section.
Student Signature		Typically high school counselors, school financial aid administrators, or other mentors
Student's Social Security XXX-XX-3307		do not charge a fee to help you complete your application, so
Student's last Painter name		they are not considered preparers unless you paid them for their services.
Student's date of birth 07/13/1999		If you are a preparer, select Yes.
READ BEFORE PROCEEDING		
<ul> <li>By signing this application electronically using your Federal Student Aid PIN, <u>use</u> and password, and/or any other credential or by signing a signature page and m it to us, YOU, THE STUDENT, certify that you:         <ol> <li>will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education.</li> </ol> </li> </ul>	ailing	
<ol> <li>are not in default on a federal student loan or have made satisfactory arrangements to repay it,</li> <li>do not owe money back on a federal student grant or have made satisfactory</li> </ol>	ctory	
4. will notify your school if you default on a federal student loan, and 5. will not receive a Federal Pell Grant from more than one school for the s.	ame 👻	
I, the student, agree to the terms outlined above.		
What is your (the student's) FSA ID?		
Do not enter the FSA ID if you are not the student.		
FSA ID Username or Verified E-mail Address		
FSA ID Password ID? Create or	FSA h FSA h a few	
Other entione to give and submit	.,	
Other options to sign and submit		
SIGN		

#### Parent Signature

Parent 1 (father's/mother's/stepparent's) Social Security Number XXX-XX-6789 A preparer is anyone who charges a fee for helping you fill Parent 1 (father's/mother's/stepparent's) last name Painter out your FAFSA. If a fee was paid to someone for advice or Parent 1 (father's/mother's/stepparent's) date of birth 02/11/1959 for completing this form, that person must complete this READ BEFORE PROCEEDING section. By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential or by signing a signature page and mailing Typically high school counselors, it to us, YOU, THE PARENT, certify that all of the information you provided is true and school financial aid complete to the best of your knowledge and you agree, if asked: administrators, or other mentors do not charge a fee to help you 1. to provide information that will verify the accuracy of your completed form complete your application, so 2. to provide U.S. or state income tax forms that you filed or are required to file. they are not considered preparers unless you paid them You also certify that you understand that the Secretary of Education has the authority for their services.

to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above. Agree Isagree

What is your (the parent's) FSA ID? Do not enter the FSA ID if you are not the parent.

FSA ID Username or Verified E-mail Address

FSA ID Password

Other options to sign and submit

SIGN

PREVIOUS SUBMIT MY FAFSA NOW

Create an FSA ID Forgot Username

Forgot Password

CLEAR ALL DATA VIEW FAFSA SUMMARY NEED HELP? SAVE

Site Last Updated: Sunday, September 25, 2016

Help and Hints

If you are a preparer, select

Yes.

EXIT

Are you a preparer?

### Signing the FAFSA without an FSA ID

Sign & Submit	Help and Hints	Parent Signature	Help and Hints
	Are you a preparer?	Information about Parent 1 (father/mother/stepparent):	Are you a preparer?
<ul> <li>Application was successfully saved.</li> </ul>	A preparer is anyone who	Parent 1 (father's/mother's/stepparent's) Social Security Number XXX-XX-6789	
	out your FAFSA. If a fee was	Parent 1 (father's/mother's/stepparent's) last name Painter	charges a fee for helping you f
W OR PRINT YOUR FAFSA INFORMATION	for completing this form, that	Parent 1 (father's/mother's/stepparent's) date of birth 02/11/1050	out your FAFSA. If a fee was paid to someone for advice or
e you a <u>preparer</u> ? Yes ● No	section.		for completing this form, that
	Typically high school counselors, school financial aid	READ BEFORE PROCEEDING By signing this application electronically using your Federal Student Aid PIN, username	section.
	administrators, or other mentors do not charge a fee to help you	and password, and/or any other credential or by signing a signature page and mailing	Typically high school counselo
mber XXX-XX-3307	complete your application, so they are not considered	complete to the best of your knowledge and you agree, if asked:	school financial aid administrators, or other mento
ne Painter	preparers unless you paid them for their services.	1. to provide information that will verify the accuracy of your completed form	do not charge a fee to help yo
Ident's date of birth 07/13/1999	If you are a preparer, select	2. to provide U.S. or state income tax forms that you filed or are required to file.	they are not considered
	Yes.	You also certify that you understand that the Secretary of Education has the authority	preparers unless you paid the for their services.
y signing this application electronically using your Federal Student Aid PIN, username		and other federal agencies.	If you are a preparer select
o us, YOU, THE STUDENT, certify that you:			Yes.
1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education		Agree	
<ol> <li>are not in default on a federal student loan or have made satisfactory arrangements to repay it.</li> </ol>		What is your (the parent's) ESA ID?	
<ol><li>do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.</li></ol>		Do not enter the FSA ID if you are not the parent.	
4. will notify your school if you default on a federal student loan, and 5. will not receive a Federal Pell Grant from more than one school for the same		FSA ID Username or Verified E-mail Address	
he student, agree to the terms outlined above.		Create an FSA ID	
at is your (the student's) ESA ID2		FSA ID Password Forgot Username	
not enter the FSA ID if you are not the student.		Other ontions to sign and submit	
A ID Username or Verified E-mail Address			
A ID Password ID? Create an FSA		SIGN	
D. It takes only a few minutes.		PREVIOUS SUBMIT MY FAFSA NOW	
er options to sign and submit			
N		NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT	
		Site Last Updated: Sunday, September 25, 2016	Download Adobe Re

Select the "other options to sign and submit" link to print, sign and mail signatures

#### Questions

We are here to help!

Contact us at:

202-885-6500

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