2026–27 FAFSA New Mexico Train the Trainer Presentation

TRAINING INTENTION

- The intention of this training is to support educators as they familiarize themselves with financial aid and the application process.
- We draw from our expertise in financial aid and experiences supporting students and their families to accomplish this.
- We acknowledge that each student has their own unique lived experience that may change how they perceive and engage with financial aid.

WHAT WE WILL COVER TODAY

FSA ID

FAFSA Line by Line

NM Financial Aid Access Professional Certification

FSA ID

FSA ID

The **FSA ID** is a **username** and **password** combination you need to sign your FAFSA form online.

If your parent has multiple children who will be filling out the FAFSA form, your parent should use their same FSA ID to sign all his or her children's FAFSA forms.

You (and your parent if applicable) should get an FSA ID before you start the FAFSA at **StudentAid.gov/fsaid**

PARENTS:
Do not create an FSA ID for your child.

STUDENTS:
Do not create an FSA ID for your parent.

Each person must create his or her own FSA ID to avoid issues with the financial aid process.

If you have an FSA ID, but cannot remember your username or password, **DO NOT** try and create another FSA ID. Your FSA ID is associated with your Social Security number, so you can only have one. Instead, just go to **fsaid.ed.gov** and click "Forgot My Username" or "Forgot My Password" to retrieve your FSA ID information.

WHO NEEDS AN FSA ID

- The Student
- At least one parent (might need both based on the Parent Wizard which we will get to later in the presentation)
    - Even if parents are not US Citizens, they will need to create an FSA ID in order to complete the student's application.
    - There are some exceptions to needing a parent to contribute to the FAFSA
        - ex: If the student is under legal guardianship of someone other than a parent or in foster care
    - Note: Parents, who have filled out a FAFSA with an older sibling, will use the FSA ID they set up at that time.

CREATING YOUR FSA ID

- Go to https://studentaid.gov/fsa-id/create-account/launch

- Select "Get Started"

CREATING YOUR FSA ID

- For US Citizens
  - Make sure your Social Security Number (SSN), date of birth, and name match what's on your Social Security Card

Create an Account

1 Personal Information — 2 Account Information — 3 Contact Information — 4 Communication Preferences — 5 Challenge Questions — 6 Confirm & Verify — 7 Enable Two-Step Verification

Personal Information

I understand that I'll be required to certify that the information I provide to create an account is true and correct and that I'm the individual I claim to be.

If I'm not the person I claim to be, I understand that I'm not authorized to proceed and that I should exit this form now. If I provide false or misleading information, I understand that I might be subject to a fine, prison time, or both.

First Name

Middle Initial

Last Name

Date of Birth

Month   Day   Year

Social Security Number

What if I don't have a Social Security number? ⌄

Cancel   Continue

CREATING YOUR FSA ID

- For Contributors who are Non-US Citizens
  - Users will select they do not have a Social Security Number (SSN) and will set up their account as the following screens show but at the end they will receive information on how to verify their identity

If you don't have a Social Security number (SSN) **and** at least one these two statements describes you, you can check the box below to create an account without an SSN:

- I am a citizen of the Freely Associated States who needs to complete the FAFSA® form online.
- I am a parent or spouse of a student who is applying for aid.

☐ **I do not have a Social Security number.**
I am a citizen of the Freely Associated States and I do not have a Social Security number (SSN); *OR* I am a parent or spouse of a student who is applying for aid and I do not have an SSN.

[Cancel]

⚠️

Warning: You must enter an SSN if you have one

If you create an account without a Social Security number (SSN) when you actually have one, you can be prevented from completing or contributing to a FAFSA form. You can also experience delays in verifying your identity and be prevented from contributing to other applications on StudentAid.gov.

You should only continue creating an account without an SSN if you do not have an SSN and one of the following statements is true for you:

⊘ I am a citizen of the Freely Associated States and need to complete the FAFSA® form online.

⊘ I am a parent or spouse of a student who is applying for aid, and I do not have an SSN.

[I have an SSN]   [I do NOT have an SSN]

CREATING YOUR FSA ID

Username
- Must be 6 to 30 characters long.
- Choose a username and password that you can remember.
- Don't include personal info such as date of birth or name.
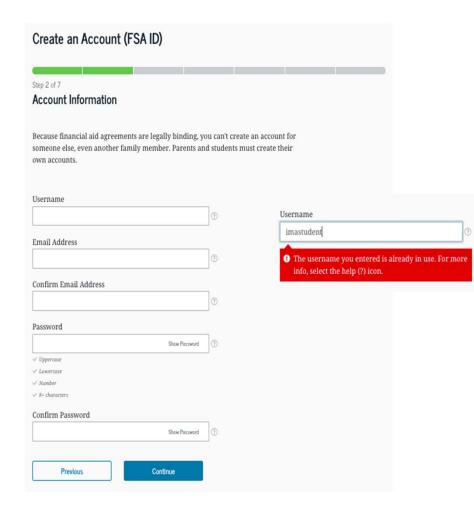- If you see a message "The username you entered is already in use," try something different

Email
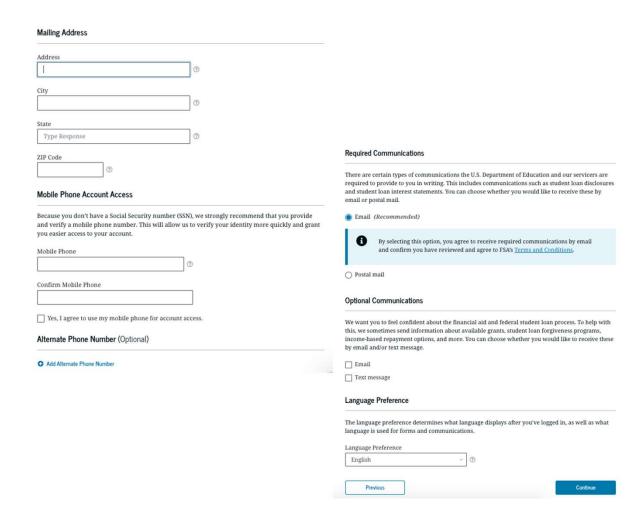- Students should not use their school email address as they will lose access to this account after graduation

Password
- Must be between 8 and 30 characters in length, and must contain at least one uppercase letter, one lowercase letter, and one number.
- Cannot include your name or birthdate

Make sure users write down/save their username and password

Create an Account (FSA ID)

Step 2 of 7
Account Information

Because financial aid agreements are legally binding, you can't create an account for someone else, even another family member. Parents and students must create their own accounts.

Username

Email Address

Confirm Email Address

Password
Show Password
✓ Uppercase
✓ Lowercase
✓ Number
✓ 8+ characters

Confirm Password
Show Password

Previous   Continue

Username
imastudent
⊘ The username you entered is already in use. For more info, select the help (?) icon.
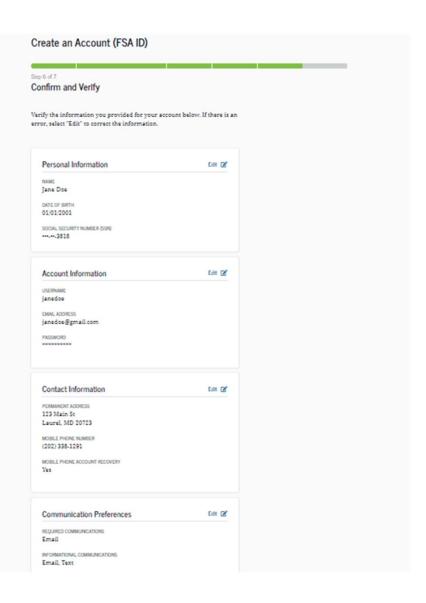
CREATING YOUR FSA ID

- You can chose to receive required communication via email or postal mail and it is up to you if you want to opt in to receive the optional communication by selecting one of the options

- Mobile Phone Number can be used to recover username and password and it is strongly recommended that you enter a phone number here

Mailing Address

Address

City

State

Type Response

ZIP Code

Mobile Phone Account Access

Because you don't have a Social Security number (SSN), we strongly recommend that you provide and verify a mobile phone number. This will allow us to verify your identity more quickly and grant you easier access to your account.

Mobile Phone

Confirm Mobile Phone

☐ Yes, I agree to use my mobile phone for account access.

Alternate Phone Number (Optional)

⊕ Add Alternate Phone Number

Required Communications

There are certain types of communications the U.S. Department of Education and our servicers are required to provide to you in writing. This includes communications such as student loan disclosures and student loan interest statements. You can choose whether you would like to receive these by email or postal mail.

◉ Email *(Recommended)*

> ⓘ By selecting this option, you agree to receive required communications by email and confirm you have reviewed and agree to FSA's Terms and Conditions.

○ Postal mail

Optional Communications

We want you to feel confident about the financial aid and federal student loan process. To help with this, we sometimes send information about available grants, student loan forgiveness programs, income-based repayment options, and more. You can choose whether you would like to receive these by email and/or text message.

☐ Email
☐ Text message

Language Preference

The language preference determines what language displays after you've logged in, as well as what language is used for forms and communications.

Language Preference

English ⌄ ⓘ

Previous   Continue

CREATING YOUR FSA ID

- Finally, you have to answer 4 challenge questions

- Make sure you spell the answers correctly and that you will remember the answers
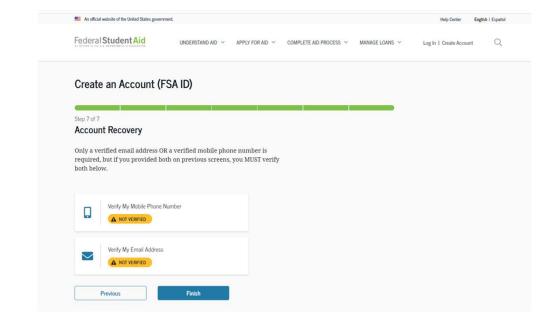
- The answers are not case-sensitive

Challenge Questions

Challenge questions and answers are used to retrieve your username or password if you forget them or if you need to unlock your account.

Note: Answers are not case-sensitive.

Challenge Question 1

Question

Select

Answer

Show Answer

Challenge Question 2

Question

Select

Answer

Show Answer

Challenge Question 3

Question

Select

Answer

Show Answer

Challenge Question 4

Question

Select

Create an Account (FSA ID)

Step 6 of 7
Confirm and Verify

Verify the information you provided for your account below. If there is an error, select "Edit" to correct the information.

Personal Information   Edit ☑

NAME
Jane Doe

DATE OF BIRTH
01/01/2001

SOCIAL SECURITY NUMBER (SSN)
•••-••-3818

Account Information   Edit ☑

USERNAME
janedoe

EMAIL ADDRESS
janedoe@gmail.com

PASSWORD
••••••••••

Contact Information   Edit ☑

PERMANENT ADDRESS
123 Main St
Laurel, MD 20723

MOBILE PHONE NUMBER
(202) 338-1291

MOBILE PHONE ACCOUNT RECOVERY
Yes

Communication Preferences   Edit ☑

REQUIRED COMMUNICATIONS
Email

INFORMATIONAL COMMUNICATIONS
Email, Text

- Review and confirm your information.

- If you need to make a correction, use the "Edit" button within that tile of information.

- Review and agree to FSA's terms and conditions.

VERIFYING YOUR CONTACT METHODS

- You will need to verify your mobile phone number and email address

- Select the "Verify My Mobile Phone Number" button to verify your mobile phone number.

- Select the "Verify My Email Address" button to verify your email address.

- Once you verify your email and phone number, you can use them to log in, unlock your account, retrieve your username, or reset your password.

USERS WITH SSN - REAL TIME SSA MATCH!!!!

Bryan Howard ✓ • 3rd+
Director of Programs at Winning Futures (Veteran)
2w • 🌐

This will be a game changer for the Class of 2K26!

Kimberly Wilson Daniel ✓ • 3rd+
Postsecondary Readiness Education Consultant - Empowerin...
2w • 🌐

This is great news for our families!!! The process is getting better!!!

Portia Cook • 2nd
Advise TN College Advisor at Tennessee Higher Education C...
2w • 🌐

Praise God!

Branden Lewis, MBA • 3rd+
Educator/Doctoral Candidate
2w • 🌐

Game changer!!

Your Account Was Successfully Created

What's Next?

✅ Your Information Has Been Verified
Your account has successfully been created and your personal information has been verified with the Social Security Administration (SSA).

💡 Remember to Save Your Backup Code
Your backup code lets you access your account in the event that you cannot use any other two-step verification method.

Your Backup Code Is:

Danielle Malfara (D'Ambrosio) ✓ • 2nd   + Follow
Coordinator of College and Career Counseling at Osceola C...
2w • 🌐

I don't think I've ever been happier to see a FAFSA update in my life! 🎉

Amber Peters (Mizz P.) ✓ • 2nd   + Follow
🎓 College and Career Consultant| 🤝 Organizational Partne...
2w • 🌐

A win is a win!!! The FAFSA application process should go alot faster now!!!

VERIFYING IDENTITY (NO SSN)

- Contributors who do not have a Social Security Number will have some extra steps to verify their identity

- When they set up their FSA ID make sure they make note of how they listed their address and that they are entering a valid email address and phone number. We recommend taking a screenshot or picture of the information entered. That information will need to match exactly what is entered on the FAFSA.

VERIFYING IDENTITY (NO SSN)

When setting up the FSA ID, the system will try to verify identity through TransUnion which will provide identity verification questions. If you successfully answer the questions, your FSA ID will be created. Do not guess on these questions.

Make sure the contributor completes their portion of the FAFSA exactly as they did when they set up their FSA ID, including:
- First and Last name
- Date of birth
- Email address
- Mailing address

Spelling and any abbreviations used must match exactly. For example, if your contributor abbreviated their address with St. or Ave. during FSA ID setup, they must also use that abbreviation when filling out the FAFSA to avoid any mismatches.

ATTESTATION & VALIDATION FORM FOR CONTRIBUTORS WITH NO SSN

If the TransUnion process did not verify identity, then the parent should receive an email with instructions to complete the attestation and validation. They will need this email as it will have the Case Number.

Sample Attestation Form:
https://studentaid.gov/sites/default/files/attestation-and-validation-of-identity.pdf

1. Read and Sign Statement of Identity
2. Provide Documentation of Identity (See table below)
3. Submit this statement and copies of documents to Federal Student Aid for processing
4. Submit this form and the required documentation to: **IDVerification@ed.gov** (do not just reply to the email they received with the Case Number)
5. Next Step – Within 1-3 business days, FSA will provide an email confirming that your identity has been verified

Section 3: Personal & Contact Information

Full Name (First, Middle, Last): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Date of Birth (MM/DD/YYYY): _____

Email Address: _____

Case Number (see e-mail from FSAIC): MANVER# _____

Section 4: Attestation & Signature

I certify that I, (Print name) _____
individual signing this Statement and Documentation of identity for purposes of obtaining credentials (FSA ID) to access the U.S. Department of Education's Systems to contribute FAFSA® form. I acknowledge and understand this Attestation Form is not an application f student financial aid under Title IV of the Higher Education Act (HEA), as amended. I furth understand and acknowledge that I must abide by the U.S. Department of Education's co conduct, terms of service, and rules of behavior when accessing and using the U.S. Depa Education's Systems (refer to September 10, 2021 Federal Register Notice for more inf

By signing below, I consent and certify under penalty of perjury under the laws of the Unit America, that the foregoing is true and correct. I understand that any falsification of this st punishable under the provisions of 18 U.S.C. § 1001 by a fine, imprisonment of not more years, or both, and that the knowing and willful request for or acquisition of records pertai individual under false pretenses is a criminal offense under the Privacy Act of 1974, subje of not more than $5,000 fine (5 U.S.C. § 552(a)(i)(3)). By signing and submitting this form request for login credentials will be logged in the U.S. Department of Education's Person Authentication Service (PAS) System of Record (18-11-12).

Name (Printed): _____

Signature: _____

Date (MM/DD/YYYY): _____

Section 5: Acceptable Identification Documents

All acceptable documents submitted for verification or proof of identity must be valid (current and unexpired). The name of the individual and address on the utility bill must match the information provided on this form. Only one (1) document is required from Group A or two (2) documents from Group B.

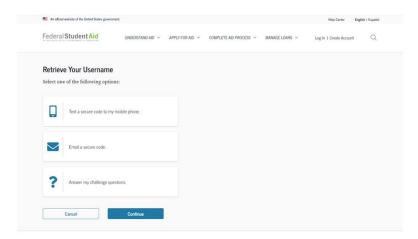| Group A: Present one of the following valid, unexpired forms of ID:	Group B: If cannot provide the documents from list one, present two of the following. The documents must be valid and unexpired unless otherwise noted below. At least one document submitted must be a photo ID:
• Driver's license, temporary license, or ID issued by a U.S. State or Territory (paper documents NOT accepted) • U.S. Passport or passport card • Foreign Passport or passport card • Consular ID Card/Matricula Consular • U.S. Border Crossing Card • U.S. Military ID Card (front and back) or U.S. Military's dependent ID card • Native American Tribal ID • Permanent Resident Card (form I-551) "green card" • Government-issued Personal Identity Verification (PIV) card • Common Access Card (CAC) • Transportation Worker Identification Credential (TWIC) • U.S. Certificate of Naturalization (Form-550 or Form N-570) • DHS/ICE Miramar Check-in Paperwork – must have a photo and seal. • U.S. Certificate of Citizenship (form N-560 or Form N-561) • Prison ID with picture, name, and date of birth • US Citizenship and Immigration Services Employment Authorization Document (EAD) (I-766) • US Merchant Mariner Credential • Veteran Health Identification Card (VHIC) • Documents reflecting TPS (Temporary Protected Status) eligibility	• Social Security Card • Birth certificate or document issued by a foreign country or U.S. state, jurisdiction, or territory • Foreign driver's license • Marriage license or divorce decree • U.S. Individual Taxpayer Identification Number (ITIN) provided on official letter awarding the ITIN or an official renewal ITIN letter from the U.S. Internal Revenue Service (IRS). • Municipal identification card (such as those issued by city ID program) • Community ID • Voter registration card • U.S. or foreign passport or passport card that expired within the previous 2 years. • Consular ID from applicant's country of citizenship that expired within the previous 2 years. • Credit card/debit card statement • Mortgage statement • Financial institution account statement • Utility bill • Federal or State tax return • W-2 • Insurance documents, including medical, dental, vision, life, home, rental, or vehicle • Rental or lease agreement with signature of landowner and tenant • Property tax bill or statement or deed or title to residential property • Pay stubs • Car registration • Foreign or U.S. School-issued or college ID card • Employee identification card • Union or worder center identification card • Foreign border crossing card (example: ECOWAS is accepted) • Foreign Military ID Card (front and back) • Foreign federal electoral photo card • Foreign national or federal government-issued ID cards (from individual's home country) • Other foreign federal government-issued identification documents • U.S. Prison ID missing picture, name, or DOB can be accepted with 2nd form of ID or official document (letter or other) from prison.

FORGOT USERNAME OR PASSWORD?

If a user forgets their username or password, they can retrieve them by:

- having a secure code emailed to them(enter their verified email address and date of birth);
- having a secure code sent to them via text (enter their verified mobile phone number and date of birth); or
- answering their challenge questions (enter their Social Security number, last name, and date of birth). Note: Users have to wait 30 minutes if you use this option to recover their password if they use the challenge questions

2026–27 FAFSA Line-by-Line

FAFSA PROTOTYPE

Accessing the 2026–27 FAFSA® Prototype

To access the 2026–27 FAFSA prototype, follow the steps below:

1. Visit fsapartners.ed.gov/fafsa-prototype/2627

2. Enter the access code: prototype2627

PROTOTYPE LIMITATIONS

The Prototype has some limitations

- Search and other complex interactions are only for example and not fully functional

- Selections with school names or cities use example content. Most School Names are not loaded

- Tooltips and other help resources may not be present

- The prototype does not adjust to the size of the browser window or device

Limited Prototype of the 2026–27 FAFSA® Form Web Experience

This demonstration provides examples of different roles and scenarios in the new form. Please read the following to understand this prototypes limitations and get the best experience.

About This Prototype

The following page is your hub for choosing different prototype scenarios from starting a new application to making corrections on a processed form.

→ Any answers you submit are not saved and there is no need to input sensitive information

→ Using the browser back button may cause loss of previous answers selected

→ If the browser is refreshed, any answers selected will be lost and reset to default states

→ This prototype will be periodically updated to match production form improvements and bug fixes

Functionality Limitations

This prototype has limited functionality and may not represent the final experience. These are a few limitations:

→ Search and other complex interactions are only for example and not fully functional

→ Dropdown and search suggestions may experience performance issues

Federal **StudentAid**
An OFFICE of the U.S. DEPARTMENT of EDUCATION

Student Application

Dependent Student: FAFSA® Landing Page

This is the main FAFSA® landing page.

On this page, students are directed to "Start New Form," "Edit Existing Forms," or new this year "Accept an Invitation."

24

Dependent Student: Log-in

- If the student selects "Start New Form" from the FAFSA® landing page and they are not logged in to StudentAid.gov, they are taken to the "Log In" page to enter their credentials.

- To access the FAFSA form, all users are required to have a StudentAid.gov account username and password.

- If the user doesn't have a username and password, they can select "Create an Account."

Dependent Student: Roles

After logging in, the user can select the applicable role to fill out the FAFSA® form: "Student" or "Parent."

The user also has the option to "Enter Code" if they received an invitation code.

26

Dependent Student: Onboarding (1 of 4)

When the user starts the 2026–27 FAFSA® form for the first time, they are taken through the FAFSA onboarding process.

The first onboarding page provides an introduction of the FAFSA form and an accompanying video. Documents that may be needed to fill out the form are also included on this page.

Dependent Student: Onboarding (2 of 4)

The second FAFSA®
onboarding page provides
information and a video
about contributors who may
be required to participate
on the student's FAFSA
form. This page also
provides information on
how the student will invite
contributors to the FAFSA
form.

28

Dependent Student: Onboarding (3 of 4)

The third FAFSA® onboarding page provides information about what the student can expect when completing the FAFSA form. This includes information about consent and approval, a time estimate for completing the form, and a note that the student can save the form and return later if needed, along with an accompanying video.

29

Dependent Student: Onboarding (4 of 4)

The last FAFSA®
onboarding page provides
information and a video
about what to expect
once the FAFSA form is
completed, submitted,
and processed. On this
page, the student can
select "Start FAFSA Form"
to begin.

Dependent Student: Student Identity Information

This is the first page within the student section. The student can verify that the personal information is correct.

They can update their address on this page but will need to return to the StudentAid.gov website to correct any of the other information.

Dependent Student: State of Residence

The student is asked about their state of residence.

New this year: The word Legal has been removed from this question.

They have also added more wording to explain what to do if the student was born in the same state that they currently reside in.

FAFSA® FORM 2026–27 · Student Alex Tran · Save · FAFSA Menu

Student State of Residence

State

Usually, this is the state where the student lives while not attending school.

Iowa (IA) ⓘ

Date the Student Became a Resident of Iowa (IA)

If the student was born in Iowa (IA) and has not moved out of state since, enter their date of birth. Otherwise, enter the date the student moved to Iowa (IA).

Month: 01   Year: 2006 ⓘ

Previous   Continue

32

Providing Consent

Dependent Student: Provide Consent and Approval

This page informs the student about consent, approval, and the use of federal tax information. Once the student provides consent and approval, their federal tax information is transferred directly from the IRS into the FAFSA® form to help complete the "Your Finances" section.

WHO SHOULD PROVIDE CONSENT AND APPROVAL

- All students
- If parents are married and filed jointly, only one parent has to provide consent. If they are married and filed separately then 3 must consent (student, parent, spouse)
  - Even if the parent's didn't file tax return
  - Even if they don't have a SSN
  - Even if they filed in a foreign country
- If students or parents do not provide consent, the student can finish the application but they will not be eligible for aid

The Student Will Be Ineligible for Federal Student Aid

You did not agree to the terms on this page. The student will not be eligible for federal student aid, including grants and loans, if you don't agree to the terms.

Select "Provide Consent" to provide your consent.

| Decline | Provide Consent |

FAFSA DEPENDENCY STATUS

If any of the following criteria applies, the student is considered <u>independent</u>:

✓ 24 years or older

✓ Married

✓ Pursuing a Master's or Doctorate Program

✓ Children and you provide ½ support

✓ In foster care since turning the age of 13

✓ Emancipated minor

✓ Currently or was in legal guardianship

✓ Homeless or self supporting and at risk of being homeless
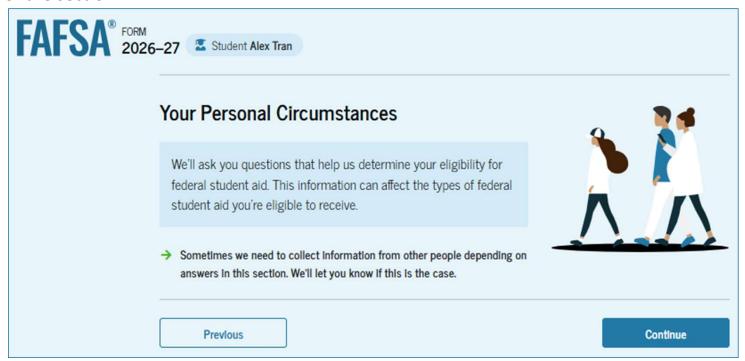
✓ Veteran or serving active duty in U.S. Armed Force

Dependent Student: Imports IRS Information

This page imports the student's federal tax information by directly transferring it from the IRS into the FAFSA® form to help complete the "Your Finances" section. If the information isn't imported, the user will have to manually enter the information

Introduction: Dependent Student Personal Circumstances

This is the first page within the "Your Personal Circumstances" section. It provides an overview of the section.

38

Dependent Student: Marital Status

The student is asked about their marital status.

Dependent Student: College or Career School Plans

The student is asked about their college grade level for the 2026–27 school year and if the student will have their first bachelor's degree.
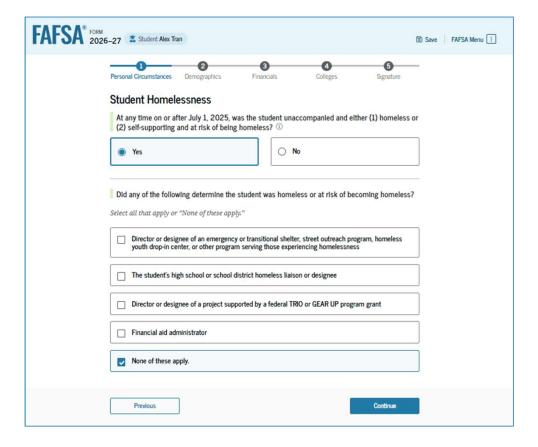
Dependent Student: Personal Circumstances

The student is asked if any of the listed personal circumstances apply.
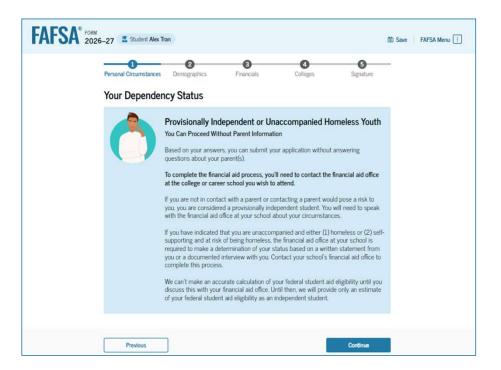

41

Student Homelessness

The student is asked if they were unaccompanied and either homeless or at risk of being homeless. If the student selects "Yes" they will be asked who determined that they are homeless or at risk of being homeless.

Impact of Unaccompanied Homeless Youth Status

If they are unaccompanied homeless youth, the parent information is not required on the FAFSA® form. The student can sign and submit the FAFSA form, but will need to contact the school's financial aid office about their circumstances. The school will be required to make a determination about the student's unaccompanied homeless youth status based on a written statement from the student or a documented interview with the student. Until the student's circumstances are verified, the U.S. Department of Education's office of Federal Student Aid will only provide the student an estimate of their federal student aid eligibility.
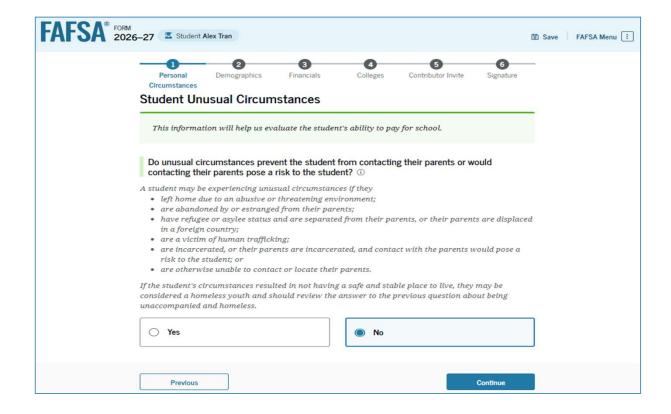

43

Dependent Student: Unusual Circumstances

The student is asked if unusual circumstances prevent them from contacting the student's parent(s).

This question is preselected "No" as this is for students in very difficult situations where it would pose a risk to the student to be in contact with their parent.
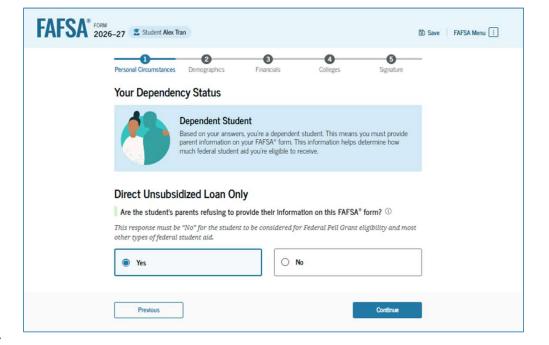
FAFSA FORM 2026–27   👤 Student Alex Tran   🗎 Save | FAFSA Menu ⋮

1 — Personal Circumstances   2 — Demographics   3 — Financials   4 — Colleges   5 — Contributor Invite   6 — Signature

Student Unusual Circumstances

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

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

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

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

○ Yes   ● No

Previous   Continue
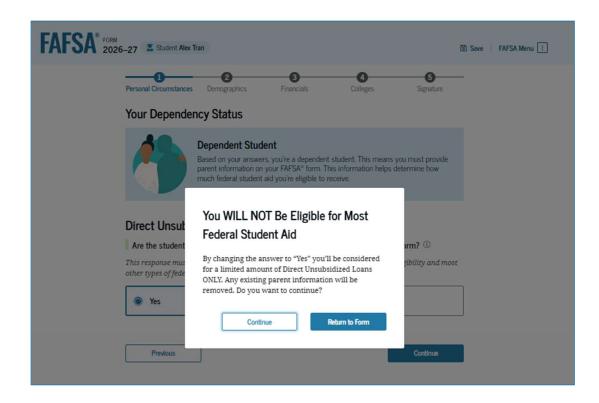
Dependency Status: Dependent Student

If the parents of a dependent student are unwilling to provide information on the FAFSA® form but the student doesn't have an unusual circumstance, the student can choose to have their school determine eligibility for a Direct Unsubsidized Loan only.

Note: Selecting "Yes" here makes the student ineligible for other types of federal student aid, such as Federal Pell Grants, Federal Work-Study, or Direct Subsidized Loans.

45

Dependent Student Selects Direct Unsubsidized Loan Only

If the student selects "Yes" to have their school determine eligibility for a Direct Unsubsidized Loan only and then selects "Continue," a pop-up window appears warning the student that they will not be eligible for most federal student aid.

46

Impact of Provisionally Independent Status

If a student answers questions that show they may be independent (legal guardianship, foster care, etc) they will get a screen to explain Provisional Indepence

Based on the answer provided by the student, the student is considered a provisionally independent student and is not required to provide parent information. The student can sign and submit their FAFSA® form, but will need to contact their school to see what supporting documentation they need to submit. A financial aid administrator at the school will review and make a determination about a dependency override. Until the student's circumstances are verified, the U.S. Department of Education's office of Federal Student Aid will only provide the student an estimate of their federal student aid eligibility.
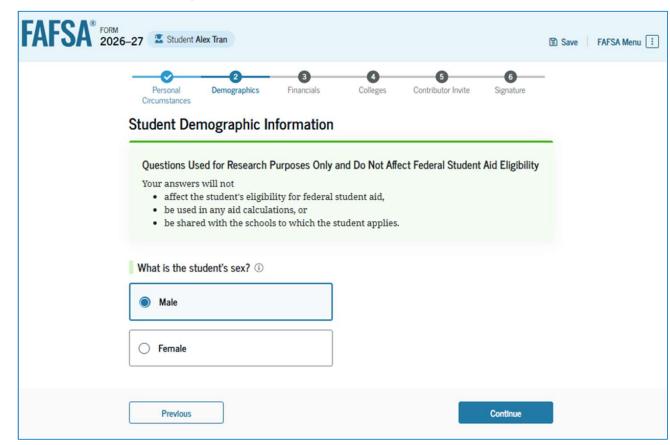

47

Introduction: Dependent Student Demographics

This is the first page within the "Student Demographics" section. It provides an overview of the section.

Dependent Student: Demographic Information

The student is asked to identify their sex.

Federal law has changed this question to only allow Male or Female and removes the prefer not to answer option.
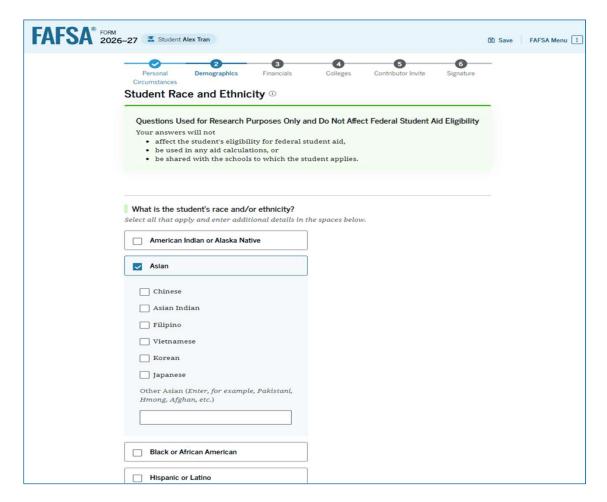
Dependent Student: Race and Ethnicity

The student is asked to identify their race.

These questions are optional and only asked for research purposes
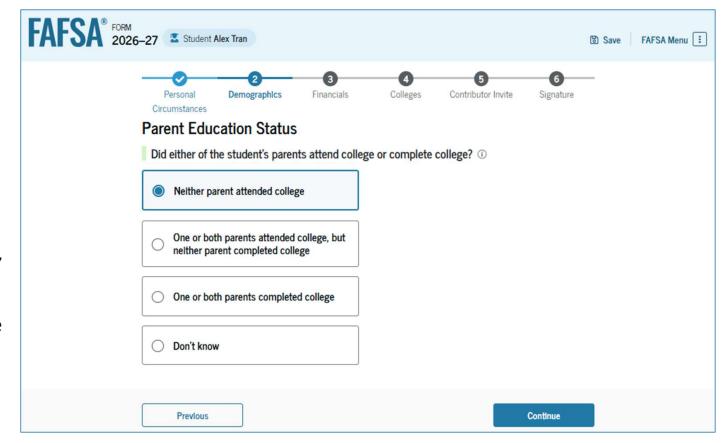

50

Dependent Student: Citizenship Status

The student is asked about their citizenship status.

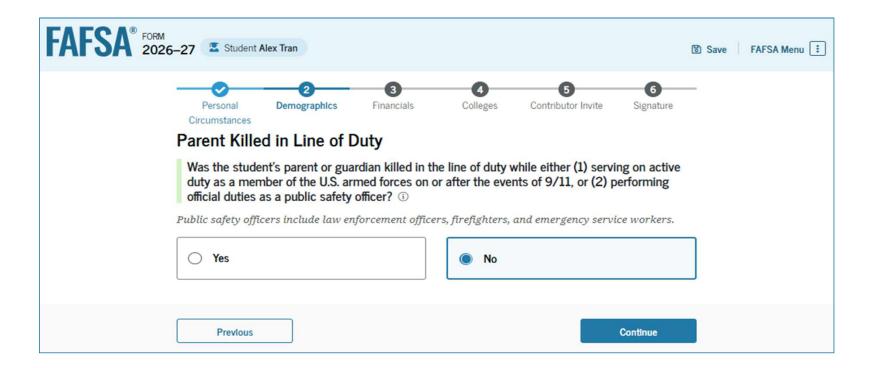# Dependent Student: Parent Education Status

The student is asked about their parents' education status.

If you are helping a student complete the FAFSA and neither of their parents attended college, it is helpful to let them know there are programs at the college level that can help 1st Generation (ex: Trio)
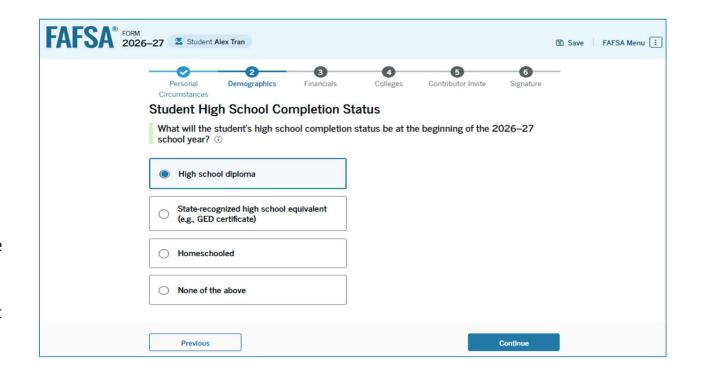
Dependent Student: Parent Killed in Line of Duty

The student is asked if their parent was killed in the line of duty.

Dependent Student: High School Completion Status

The student is asked about what their high school completion status will be when the student starts the 2026–27 school year.
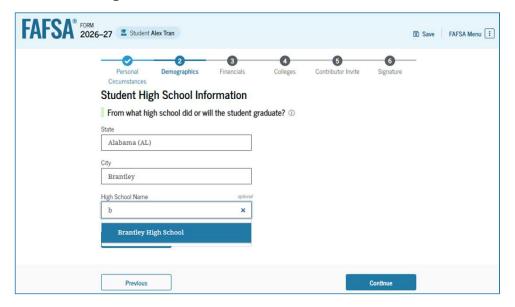
Make sure current seniors are selecting High school diploma. Some think they are answering what their status is right now. It's actually what will their status be when they begin college
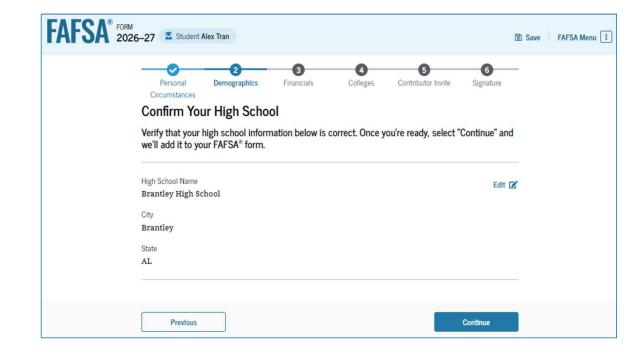

54

Dependent Student: High School Information

Because the student selected high school diploma, the student is asked to select which high school they did or will graduate from. The student enters the high school's state and city. After selecting "Search," the student selects the correct high school from the search results.

Dependent Student: Confirm High School

The student has the option to edit the high school information presented on this page by selecting "Edit," which will return the student to the high school information page. The student confirms the high school information and selects "Continue" to proceed to the next section.

56

Introduction: Dependent Student Financials

This is the first page within the "Your Finances" section. It provides an overview of the section. The student can select the hyperlink to learn about special financial circumstances.

Dependent Student: Tax Filing Status

The student is asked about their tax filing status.

If they select that they filed taxes but their tax information didn't come over at the beginning of the application, they will be taken to the questions to manually enter their information.

Dependent Student: Tax Return Information

The student is asked about their 2024 tax return.

Dependent Student: Tax Return Information (Continued)

If the student's information was not transferred from the IRS, they will be asked about their taxes, income, and other financial information.

Take the time to let them know that most scholarships are not reported to the IRS so that will most likely be 0 also
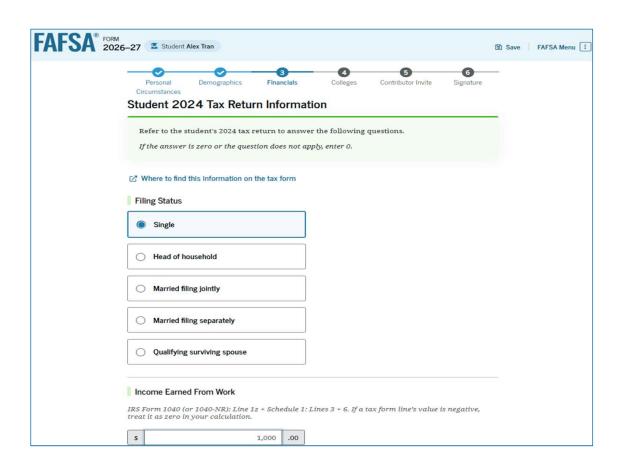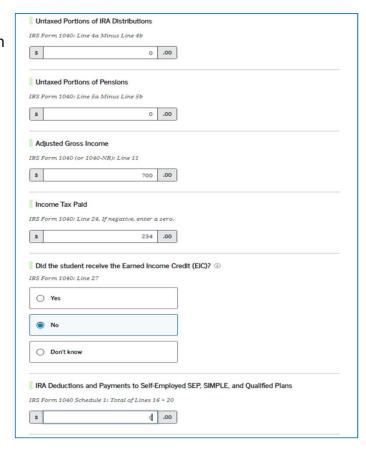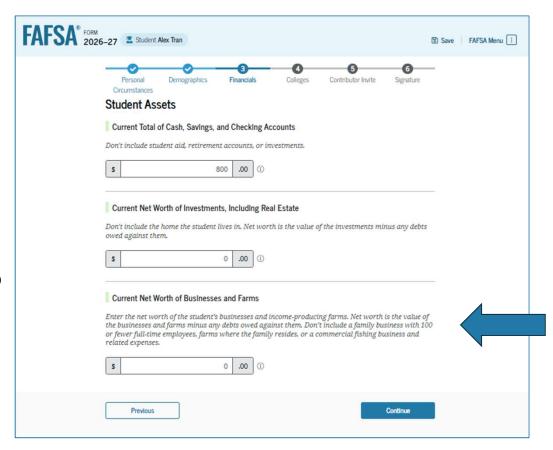
Untaxed Portions of IRA Distributions

IRS Form 1040: Line 4a Minus Line 4b

$ [0] .00

Untaxed Portions of Pensions

IRS Form 1040: Line 5a Minus Line 5b

$ [0] .00

Adjusted Gross Income

IRS Form 1040 (or 1040-NR): Line 11

$ [700] .00

Income Tax Paid

IRS Form 1040: Line 24. If negative, enter a zero.

$ [234] .00

Did the student receive the Earned Income Credit (EIC)? ⓘ

IRS Form 1040: Line 27

○ Yes

◉ No

○ Don't know

IRA Deductions and Payments to Self-Employed SEP, SIMPLE, and Qualified Plans

IRS Form 1040 Schedule 1: Total of Lines 16 + 20

$ [0] .00

Education Credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit)

IRS Form 1040 Schedule 3: Line 3 + IRS Form 1040: Line 29

$ [0] .00

Did the student file a Schedule A, B, D, E, F, or H with their 2024 IRS Form 1040? ⓘ

○ Yes

◉ No

○ Don't know

Net Profit or Loss From IRS Form 1040 Schedule C

IRS Form 1040 Schedule C: Line 31

$ [0] .00

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

Students typically answer this question with a zero because most scholarships and grants, including Federal Pell Grants, are not considered taxable income. If the student is married, include the amount their spouse reported. If the response is other than zero, the amount is typically not the same as the amount reported on IRS Form 1098-T (Box 5) or the adjusted gross income reported on the tax return.

$ [0] .00 ⓘ

Foreign Earned Income Exclusion

IRS Form 1040 Schedule 1: Line 8d

$ [0] .00 ⓘ

Previous   Continue

60

Dependent Student: Assets

The student is asked about their assets. The student enters a response in each entry field. If the student has nothing to report, the student enters the numeral zero.

Note: The help text has been updated to include the asset exemptions for businesses and farms.

61

Introduction: Dependent Student Select Colleges

This is the first page in the "Select Colleges and Career Schools" section. It provides an overview of the section.

Dependent Student: College Search

The student is asked which colleges, career schools, or trade schools they want to receive their FAFSA® information.

If the student can't find a school searching by state, the student can search by school code.

Dependent Student: College Search (Continued)

After entering a school's state and selecting "Search," the student selects the correct school(s) from the search results. Students can send their FAFSA® information to a maximum of 20 schools. The student must add at least one school to continue.

American Career College Los Angeles, California (CA)	Federal School Code 015829	+ Select
American Career College Ontario, California (CA)	Federal School Code 039713	✓ Selected
American College of Healthcare and Techn Riverside, California (CA)	Federal School Code 031444	✓ Selected
American Conservatory Theater Foundation San Francisco, California (CA)	Federal School Code 014545	✓ Selected
American Film Institute Los Angeles, California (CA)	Federal School Code G22220	✓ Selected

🔍 Search and Select More Schools

< Previous   1   2   3   4   5   Next >

Previous   Continue

64

Dependent Student: Selected Colleges

After the student selects the correct school(s) from the search results, the student can review the school(s) chosen before continuing. If 20 schools have not been selected, the student has the option to search and select more schools, and, in some states, the student has the option to reorder the list of selected schools.

65

Introduction: Dependent Student Invites Contributor

This is the first page in the "Invite a Parent as a Contributor" section, which is the last student section to require information. It provides an overview of the section.

66

PARENT WIZARD

Who should enter as a parent on the FAFSA® form?

A student may need to ask their parent(s) to provide information on their FAFSA form based on the student's dependency status.

This tool helps determine which parent(s) should participate in a student's FAFSA form.

To begin using the tool, enter the first name of the student's legal parent(s).

This helps us provide clear direction on which parent(s) should participate in the student's FAFSA form.

Who is considered a legal parent?

First Name (Parent 1)   First Name (Parent 2)

☐ The student has only one legal parent.

[Continue]

↺ Start Over

The Student's Legal Parents:

👥 Mom   👥 Dad

Are Mom and Dad married to each other (not separated)?

○ Yes   ◉ No

Do Mom and Dad live together?

○ Yes   ◉ No

Which parent has provided more financial support for the student over the past 12 months?

If both parents provided an equal amount of financial support or if neither supports the student financially, select the parent with the greater income and assets. The parent who provided more financial support may or may not be the same parent that the student lives with.

◉ Mom   ○ Dad

Did Mom remarry?

○ Yes   ◉ No

The Student's FAFSA® Parent

👥 Only **Mom** is a parent on the student's FAFSA® form.

- The student will need to invite only Mom to the FAFSA form.
- Mom should report their current marital status as single (never married), separated, divorced, or widowed.
- The student's FAFSA form will need financial information related to Mom.
- Mom will need a StudentAid.gov account username and password to fill out their portion of the student's FAFSA form.

How To Invite a Parent ⌄

Dependent Student: Invite Contributor (Continued 1 of 2)

The student is asked to enter their parent's email address to invite the parent to the FAFSA® form. After entering the email address, the student selects "Send Invite." A pop-up window appears, and the student confirms their parent's email address by selecting "Send Invite."

Dependent Student: Invite Contributor (Continued 2 of 2)

This page confirms the student's parent will receive an email inviting them to the student's FAFSA® form. The parent can access the form by accepting the invitation in the email. On this page, the student is also provided an invitation link and invitation code that can be shared directly with the parent.

Dependent Student: Review Page

The review page displays the responses that the student has provided in the FAFSA® form. The student can view all responses by selecting "Expand All" or expand each section individually. To edit a response, the student can select the question's hyperlink to be taken to the corresponding page.

Dependent Student: Signature

On this page, the student reviews the terms and conditions of the FAFSA® form and what they'll agree to when the student signs the form.

Note: If you do not submit your application and do not log into the application for 45 days all the data will be deleted.

FAFSA® FORM 2026–27   Student Alex Tran

Personal Circumstances — Demographics — Financials — Colleges — Contributor Invite — **Signature** (6)

Sign and Complete Your Section ⓘ

Summary

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

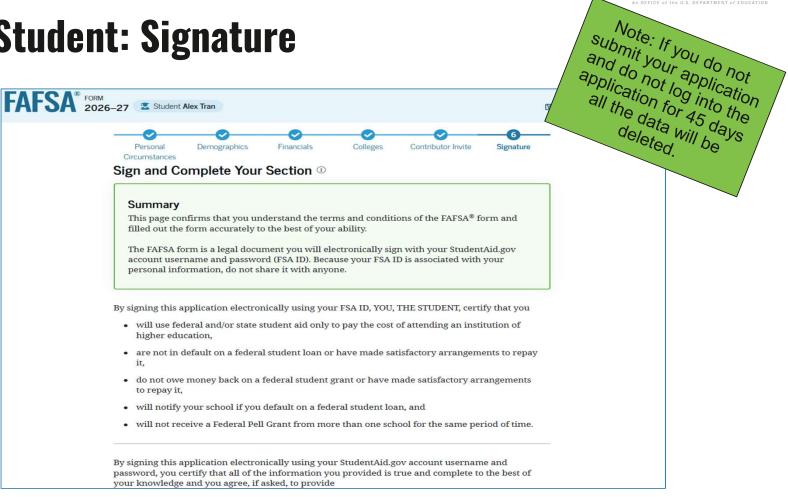The FAFSA form is a legal document you will electronically sign with your StudentAid.gov account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

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

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

By signing this application electronically using your StudentAid.gov account username and password, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide
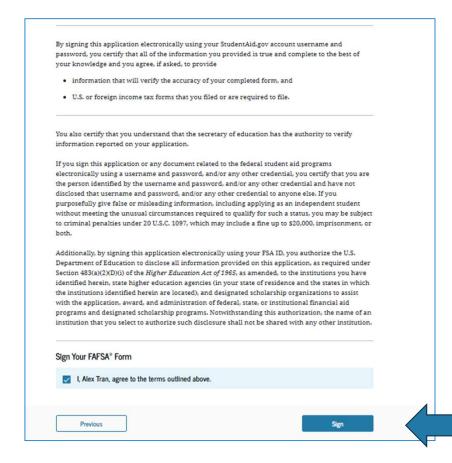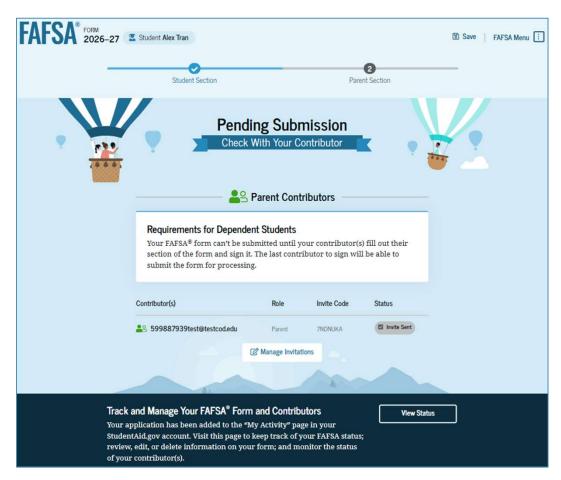
71

Dependent Student: Signature (Continued)

This is a continuation of the student signature page. After agreeing to the terms and conditions of the FAFSA® form and digitally signing, the student is able to submit their sections of the FAFSA form. Since parent information has not been provided, the FAFSA form is not considered complete and can't be processed yet.

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

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

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

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

Additionally, by signing this application electronically using your FSA ID, you authorize the U.S. Department of Education to disclose all information provided on this application, as required under Section 483(a)(2)(D)(i) of the *Higher Education Act of 1965*, as amended, to the institutions you have identified herein, state higher education agencies (in your state of residence and the states in which the institutions identified herein are located), and designated scholarship organizations to assist with the application, award, and administration of federal, state, or institutional financial aid programs and designated scholarship programs. Notwithstanding this authorization, the name of an institution that you select to authorize such disclosure shall not be shared with any other institution.

Sign Your FAFSA® Form

☑ I, Alex Tran, agree to the terms outlined above.

Previous   Sign

72

Dependent Student: Section Complete

Upon digitally signing the student section, the student is presented with the "Pending Submission" page. The student is reminded that their FAFSA® form is not completed and can't be submitted until the parent completes the contributor section of the form and signs it. This page also displays next steps the student can take, including tracking and managing their form.
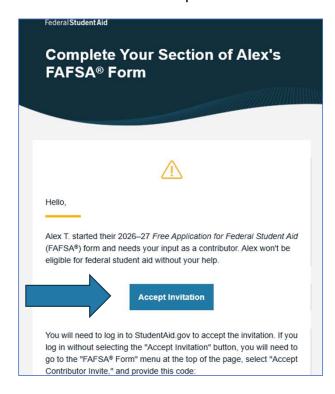
Dependent Student Parent Section

Dependent Student: Parent Email

This is NOT a view within StudentAid.gov or the FAFSA® form. This view demonstrates a parent opening the FAFSA invitation from their email. The parent selects "Accept Invitation" and is taken to StudentAid.gov.

Federal **Student Aid**

Complete Your Section of Alex's FAFSA® Form

⚠

Hello,

Alex T. started their 2026–27 *Free Application for Federal Student Aid* (FAFSA®) form and needs your input as a contributor. Alex won't be eligible for federal student aid without your help.

Accept Invitation

You will need to log in to StudentAid.gov to accept the invitation. If you log in without selecting the "Accept Invitation" button, you will need to go to the "FAFSA® Form" menu at the top of the page, select "Accept Contributor Invite," and provide this code:

7X6XHXF

If this invitation was sent to you by mistake, decline the invitation.

ⓘ **Why You Were Invited**

We need some information from you to determine what aid Alex is eligible for. Without your input, they won't be eligible for federal student aid.

Being a contributor doesn't make you responsible for Alex's education costs.

The FAFSA® form is often used to determine a student's eligibility for state and school financial aid in addition to federal financial aid.

We recommend finishing early in case states or schools have earlier deadlines.

Sign up for text alerts to stay updated on our grant programs, loan forgiveness programs, repayment plans, and information about your loans.

75

Dependent Student: Parent Log-in

The parent is taken from their email to the "Log In" page to enter their credentials. To access the FAFSA® form, all users are required to have a StudentAid.gov account username and password. If the parent doesn't have a username and password, they can select "Create an Account."

Dependent Student: Parent Accepts Invitation

After logging in, the parent is taken to the "Accept 2026–27 FAFSA® Invitation" page. The invitation code from the parent's email automatically fills in the text box if the parent used the link from the email.

Dependent Student: Parent Accepts Invitation (Continued)

When the parent selects "Submit," a pop-up window appears, confirming the student's name and reminding the parent that their personal information is needed to fill out the student's FAFSA® form. The parent selects "Accept" to agree to sharing their information and enters the FAFSA form.

Dependent Student: Parent Onboarding (1 of 4)

When the parent enters a 2026–27 FAFSA® form for the first time, they are taken through the FAFSA onboarding process. The first onboarding page provides an introduction of the FAFSA form and an accompanying video.

Dependent Student: Parent Onboarding (2 of 4)

The second FAFSA®
onboarding page provides
information and a video
about contributors that may
be required to participate on
the student's FAFSA form.
This page also provides
information on how the
parent will invite contributors
to the FAFSA form.

Dependent Student: Parent Onboarding (3 of 4)

The third FAFSA® onboarding page provides information about what the parent can expect when completing the student's FAFSA form. This includes information about consent and approval, a time estimate to complete the form, and a note that the parent can save the form and return later if needed, along with an accompanying video.

81

Dependent Student: Parent Onboarding (4 of 4)

The last onboarding page provides information and a video about what to expect once the FAFSA® form is completed, submitted, and processed. On this page, the parent selects "Start FAFSA Form" to begin the parent section.

82

Dependent Student: Parent Identity Information

This is the first page within the parent section. The parent can verify that the personal information is correct. They can change their address on this screen but to update any of the other personal information, the parent must access their account settings on StudentAid.gov.

Dependent Student: Parent Provides Consent and Approval

This page informs the parent about consent, approval, and the use of their federal tax information. Once the parent provides consent and approval, their federal tax information is transferred directly from the IRS into the FAFSA® form to help complete the "Parent Finances" section.

Dependent Student: Parent Imports IRS Information

This page imports the parent's federal tax information by directly transferring it from the IRS into the FAFSA® form to help complete the "Parent Finances" section.
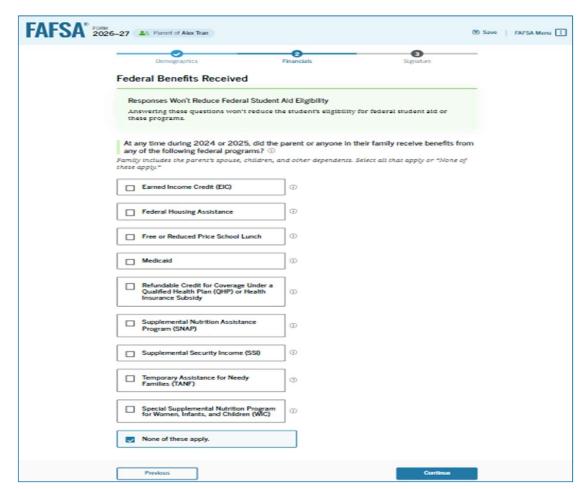
Introduction: Dependent Student's Parent Demographics

This is the first page in the "Parent Demographics" section. It provides an overview of the section.

Dependent Student: Parent Current Marital Status

The parent is asked about their current marital status.

Dependent Student: Parent State of Residence

The parent is asked about their state of residence. The parent selects the state from a drop-down box and provides the month and year when the parent became a resident.

Introduction: Dependent Student's Parent Finances

This is the first page within the "Parent Finances" section. It provides an overview of the section. The parent can select the hyperlink to learn about special financial circumstances.

Dependent Student: Parent Federal Benefits Received

This page asks the parent if the parent or anyone in the parent's family has received federal benefits.

Dependent Student: Parent Tax Filing Status
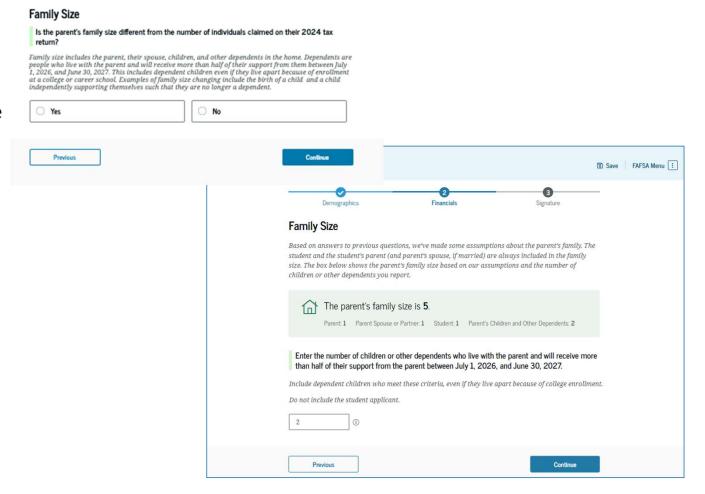
This page asks the parent about their tax filing status.

Remember, if parents are married but filed separately, then both parents will need to be contributors to the student's FAFSA.
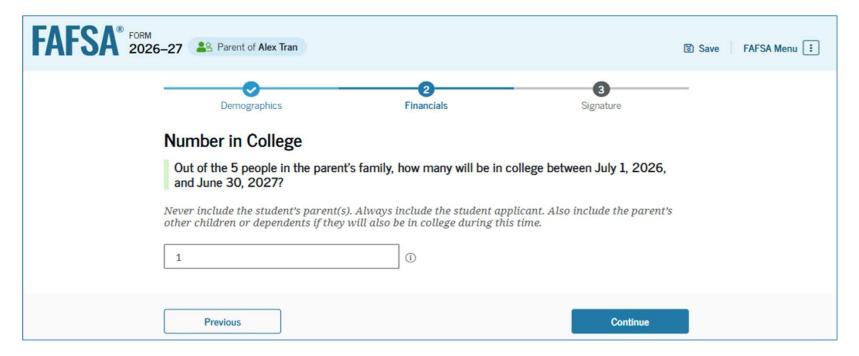
Dependent Student: Parent Family Size

This page displays the family size for the student. The parent has the option to enter the number of children or other dependents who live with the parent and will receive more than half of their support from the parent between July 1, 2026, and June 30, 2027.

Family Size

Is the parent's family size different from the number of individuals claimed on their 2024 tax return?

Family size includes the parent, their spouse, children, and other dependents in the home. Dependents are people who live with the parent and will receive more than half of their support from them between July 1, 2026, and June 30, 2027. This includes dependent children even if they live apart because of enrollment at a college or career school. Examples of family size changing include the birth of a child and a child independently supporting themselves such that they are no longer a dependent.

○ Yes   ○ No

Previous   Continue

Save | FAFSA Menu ⋮

✓ Demographics — ② Financials — ③ Signature

Family Size

Based on answers to previous questions, we've made some assumptions about the parent's family. The student and the student's parent (and parent's spouse, if married) are always included in the family size. The box below shows the parent's family size based on our assumptions and the number of children or other dependents you report.

🏠 The parent's family size is **5**.

Parent: 1   Parent Spouse or Partner: 1   Student: 1   Parent's Children and Other Dependents: 2

Enter the number of children or other dependents who live with the parent and will receive more than half of their support from the parent between July 1, 2026, and June 30, 2027.

Include dependent children who meet these criteria, even if they live apart because of college enrollment.

Do not include the student applicant.

2   ⓘ

Previous   Continue

Federal StudentAid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

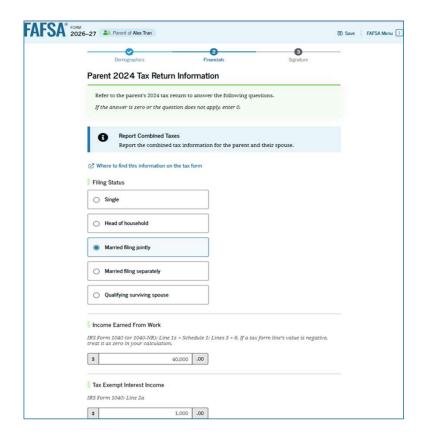# Dependent Student: Parent Number in College

This page asks the parent how many people in the family will be in college between July 1, 2026, and June 30, 2027. This information will not be used in the SAI calculation.

Dependent Student: Parent Tax Return Information

The parent is asked questions about their 2024 tax return. The parent enters a response in each entry field. If the parent has nothing to report, the parent enters the numeral zero.
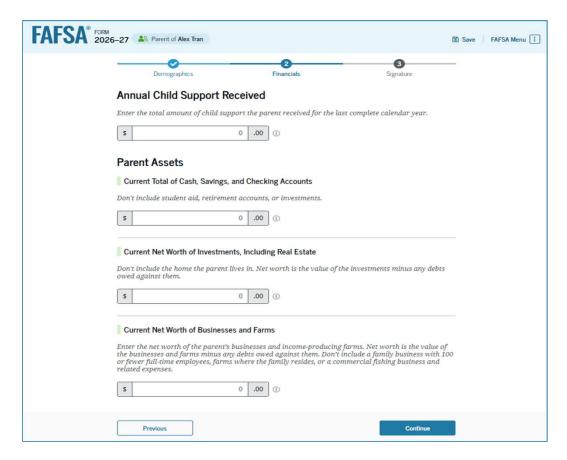
Dependent Student: Parent Assets

The parent is asked about their assets. The parent enters a response in each entry field. If the parent has nothing to report, the parent enters the numeral zero.

Note: If a parent has a 529 college fund for their students, they no longer have to report the total of all funds for each student. They only have to report the amount of the 529 for the student they are filling the FAFSA out for.

FAFSA FORM 2026–27   Parent of Alex Tran   Save | FAFSA Menu

Demographics — Financials — Signature

Annual Child Support Received

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

$ [0] .00

Parent Assets

Current Total of Cash, Savings, and Checking Accounts

Don't include student aid, retirement accounts, or investments.

$ [0] .00

Current Net Worth of Investments, Including Real Estate

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

$ [0] .00

Current Net Worth of Businesses and Farms

Enter the net worth of the parent's businesses and income-producing farms. Net worth is the value of the businesses and farms minus any debts owed against them. Don't include a family business with 100 or fewer full-time employees, farms where the family resides, or a commercial fishing business and related expenses.

$ [0] .00

Previous   Continue

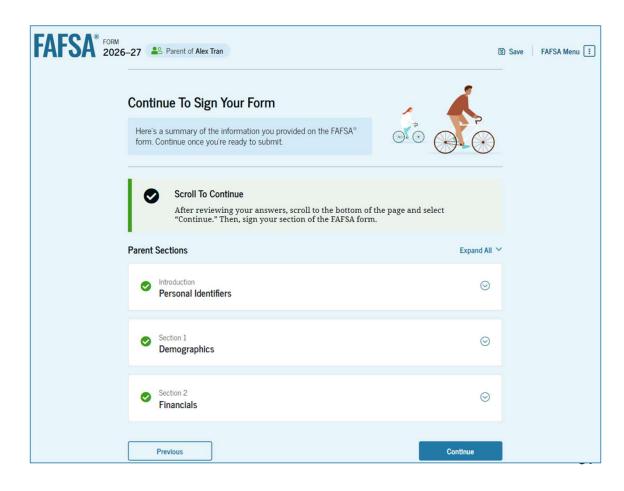# Dependent Student: Other Parent Information

The parent is asked to provide information about their spouse or partner. In this example, the other parent does not need to contribute to the student's FAFSA® form because the parents filed taxes jointly. After providing the other parent's date of birth, all required parent information will be complete.
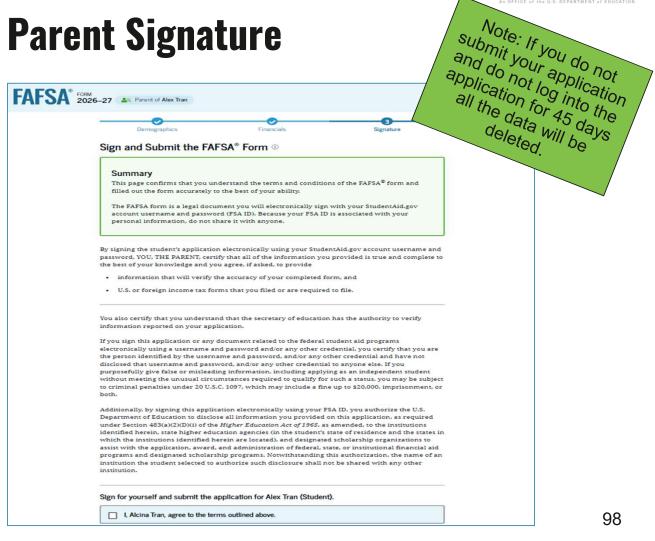
Dependent Student: Parent Review Page

The review page displays the responses that the parent has provided in the FAFSA® form. The parent can view responses only within the parent section of the student's FAFSA form. The parent can view all the responses by selecting "Expand All" or expand each section individually. To edit a response, the parent can select the question's hyperlink to be taken to the corresponding page.

Dependent Student: Parent Signature

Note: If you do not submit your application and do not log into the application for 45 days all the data will be deleted.

On this page, the parent acknowledges the terms and conditions of the FAFSA® form and digitally signs the parent section. Since all required sections are complete, the parent can both sign and submit the student's FAFSA form.
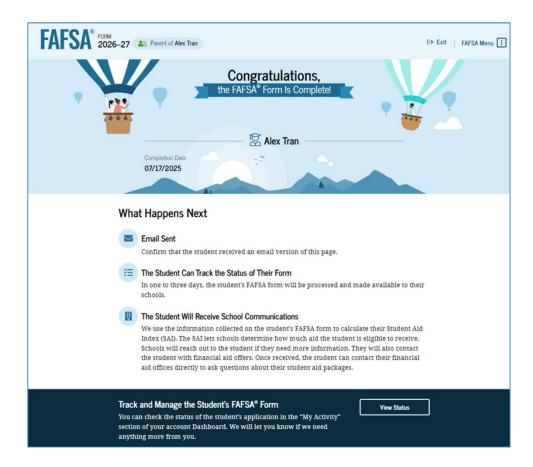

98

Dependent Student: Parent Confirmation

Upon submitting the student's FAFSA® form, the parent is presented an abbreviated confirmation page. This page displays information about tracking the student's FAFSA form and next steps. The student will receive an email with the full, detailed confirmation. With the student and parent sections completed and signed, the FAFSA form is now considered complete and submitted for processing.

ABBREVIATED CONFIRMATION PAGE

The abbreviated version of the confirmation form that does not have the Estimated Student Aid Index and Pell eligibility. The student will get an email copy of that information no matter who submits the application.

Parent View

Student View

OTHER FAFSA SCENARIOS

- Independent students will only complete the student section of the form-may need to invite spouse to complete a section based on 2024 tax filing status

- Provisionally independent students will only complete the student section of the form

- Parents can start the form and invite the student to complete their section. This often works when the invitation to the parent contributor(s) is not matching.

- Paper FAFSAs will be available-not recommended if online version can be accomplished

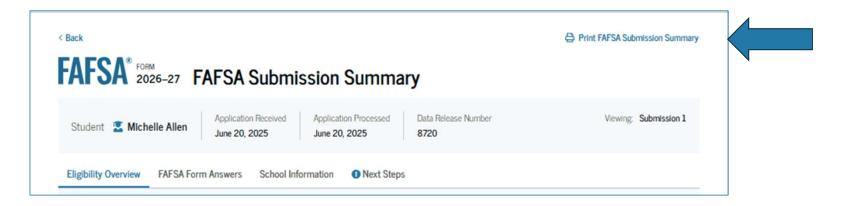- Prior to any portion of the form being submitted, the FAFSA can be deleted and started again

FAFSA Submission Summary
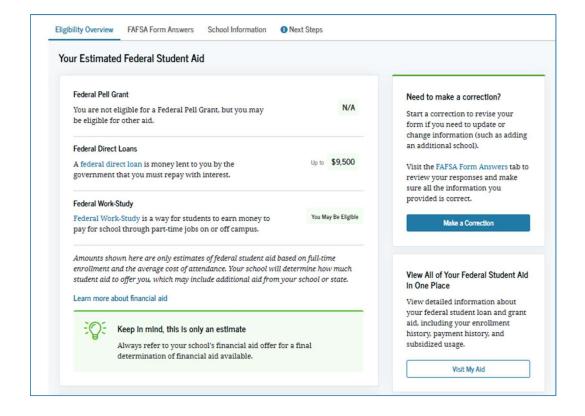
FAFSA Submission Summary Landing Page

The student receives a FAFSA Submission Summary for their processed FAFSA® form and any subsequent corrections that the student submits. The FAFSA Submission Summary is divided into four tabs: "Eligibility Overview," "FAFSA Form Answers," "School Information," and "Next Steps." At the top, the student will see when the FAFSA form was received and processed. The student also has the option to print the FAFSA Submission Summary to keep for their records.
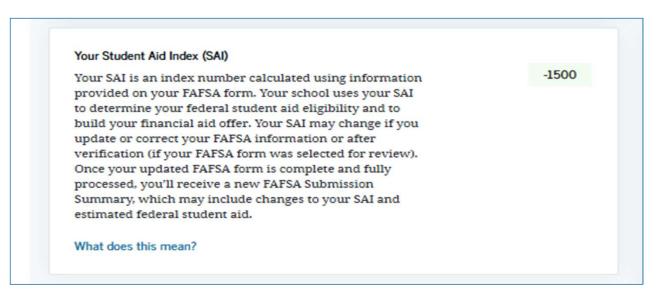
Eligibility Overview

On the "Eligibility Overview" tab, the student sees information about the federal student aid for which they may be eligible, such as a Federal Pell Grant and Federal Direct Loans. Any amounts of financial aid that display on this tab are estimates and are not guaranteed. The school's financial aid office provides final determination of the student's financial aid eligibility.
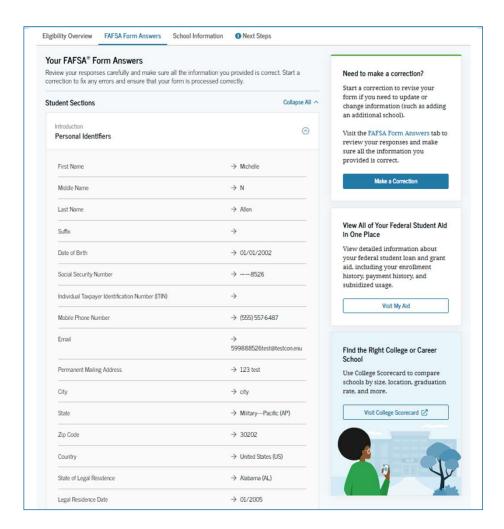
Eligibility Overview (Continued)

This is a continuation of the "Eligibility Overview" tab of the FAFSA Submission Summary. The student can view their Student Aid Index. The school's financial aid office provides final determination of the student's financial aid eligibility.

Your Student Aid Index (SAI)   -1500

Your SAI is an index number calculated using information provided on your FAFSA form. Your school uses your SAI to determine your federal student aid eligibility and to build your financial aid offer. Your SAI may change if you update or correct your FAFSA information or after verification (if your FAFSA form was selected for review). Once your updated FAFSA form is complete and fully processed, you'll receive a new FAFSA Submission Summary, which may include changes to your SAI and estimated federal student aid.

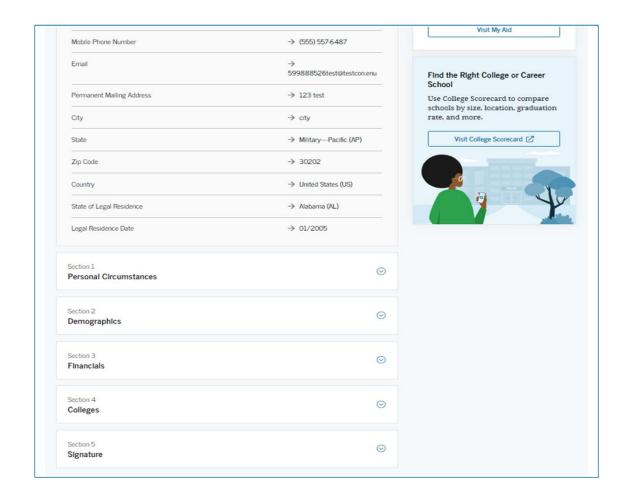What does this mean?

FAFSA® Form Answers

On the "FAFSA Form Answers" tab, the student sees the answers provided on their FAFSA® form. If any of the provided answers are incorrect, the student can choose "Make a Correction."
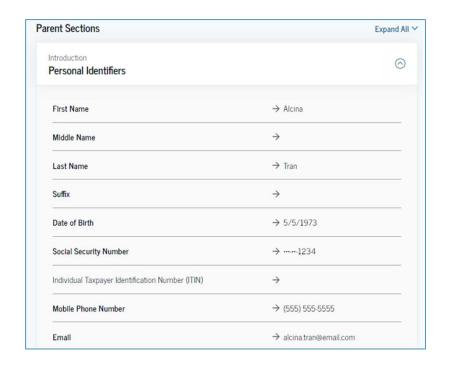
FAFSA® Form Answers (Continued)

This is a continuation of the "FAFSA Form Answers" tab, where the student sees the answers provided on their FAFSA® form.
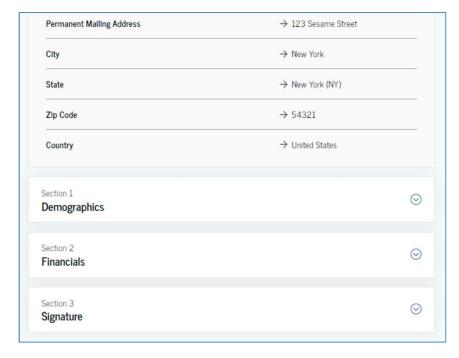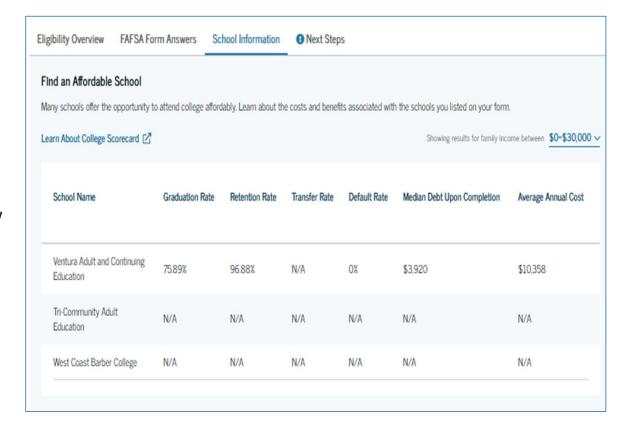
FAFSA ® Form Answers Contributors

This is a continuation of the "FAFSA Form Answers" tab. If applicable, the student sees the answers their contributor(s) provided on the FAFSA® form.
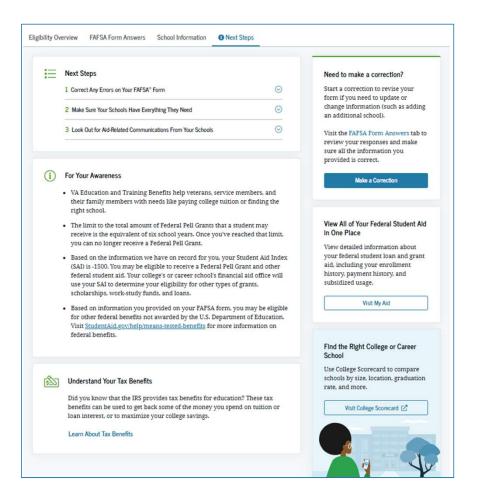
School Information

On the "School Information" tab, the student sees information about the college(s), career school(s), and/or trade school(s) they selected to receive their FAFSA® information. The student can view graduation rate, retention rate, transfer rate, default rate, median debt upon completion, and average annual cost of the selected school(s).

Eligibility Overview	FAFSA Form Answers	School Information	ⓘ Next Steps

Find an Affordable School

Many schools offer the opportunity to attend college affordably. Learn about the costs and benefits associated with the schools you listed on your form.

Learn About College Scorecard ⧉   Showing results for family income between $0-$30,000 ⌄

School Name	Graduation Rate	Retention Rate	Transfer Rate	Default Rate	Median Debt Upon Completion	Average Annual Cost
Ventura Adult and Continuing Education	75.89%	96.88%	N/A	0%	$3,920	$10,358
Tri-Community Adult Education	N/A	N/A	N/A	N/A	N/A	N/A
West Coast Barber College	N/A	N/A	N/A	N/A	N/A	N/A

Next Steps

On the "Next Steps" tab, the student sees comments that pertain to their FAFSA® form. Some comments may require the student to make a correction or send additional documentation to their school. Other comments may be informational and require no action from the student.

More Resources

Lastly, along the right side of the FAFSA Submission Summary, the student can access additional resources, including links to "My Aid" or College Scorecard.