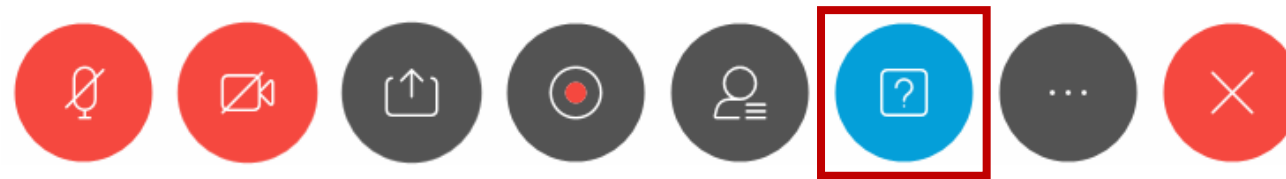


FAFSA Overview for Educators

2026



We will be taking questions using the Q&A feature at the end of our presentation.



Select the ? symbol (surrounded by the square), to see the feature box on the right of your screen.

Presenters

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Higher Education Access Partner

Allegheny County

Evelyn Disla-Hernandez

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Carbon, Lehigh, Monroe, Montgomery, Northampton, and Pike Counties

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Application Process



Prior to Applying



Students should know that the FAFSA is a federal application used to determine student eligibility for:

- Federal programs
- State programs
- School programs

When to Apply

The FAFSA will be available **October 1** for the upcoming award year.



Know Your Deadlines!

PA State Grant Filing Deadline

May 1, 20XX

- All renewal applicants
- New applicants who plan to enroll in a degree program
- New applicants enrolling in a college transferable program

August 1, 20XX

- Non-renewal applicants enrolling in:
 - Business, Trade, or Technical School
 - Hospital school of Nursing
 - Community College
 - Open-admission Colleges
 - 2-year programs that are not transferable

StudentAid.gov Account Process

- Students will need a **StudentAid.gov** Account to start the FAFSA form online
- Users will be presented with the same questions in the account creation process
 - Personal information (name, DOB, Social Security number)
 - Account information (username and password)
 - Contact information
 - Communication preferences
- Users will set up multi-factor authentication
- Parents can create a StudentAid.gov Account without an SSN
- Identity match with the Social Security Administration (SSA) will be completed when SSN is provided

StudentAid.gov Account Screenshot of Account Creation Page

An official website of the United States government. Help Center Submit a Complaint English | Español

Federal Student Aid AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION FAFSA® Form ▾ Loans and Grants ▾ Loan Repayment ▾ Loan Forgiveness ▾ Log In | Create Account 🔍

Create an Account

Whether you're a student, parent, or borrower, you'll need to create your own account to apply for, receive, and manage your federal student aid.

[Get Started](#)

Already have an account? [Log In](#)

What You Can Do With Your Account

You must have an account to do the following:

- Fill out the *Free Application for Federal Student Aid* (FAFSA®) form online
- Complete other online forms (such as the *Master Promissory Note*) required to receive aid
- Review the federal student aid you've received

What You'll Need

- Your Social Security number (if applicable)
- Your own email address

Hi there! I'm Aidan®, the financial aid virtual assistant. How can I help you today?

- [Help with the FAFSA® form](#)
- [Login \(FSA ID\) issues](#)
- [I want my loan and grant info](#)
- [I have a different question](#)

Who is a Contributor on the 2027-28 FAFSA?

- Students will need to "invite" their contributors to complete their portion of the FAFSA.
- To invite contributors, students will need contributors email addresses.
- A code will be sent to the parent or spouse by email.
 - The parent or spouse will be directed to accept the invite by entering the code on an "Accept an Invite" page that can be accessed by the email or StudentAid.gov once they are logged in.



For Dependent Students, Who Reports Info on the 2027-28 FAFSA?

YES

- Married parents living together
- Biological parents living together
- Divorced or separated parents:
 - The parent that provided the most financial support to student over the past 12 months
 - If equal, then student would invite the parent with the higher income and assets
- Stepparent – If part of the student's household
- Adoptive parents

NO

- Foster Parents
- Legal Guardians
 - By court order
- Anyone else the student is living with



Who counts as a parent on the FAFSA form?

A student may need to ask their parents to provide information on their FAFSA form based on the student's **dependency status**.

This tool helps determine which parents should participate in a student's **FAFSA form**.

StudentAid.gov/fafsaParent

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)
<input type="text"/>	<input type="text"/>

The student has only one legal parent.

Continue

Who needs to create a StudentAid.gov Account?

- The student
- The student's spouse if married filing separate tax return
- A biological or adoptive parent
- The spouse of the remarried parent who is on the FAFSA (stepparent)—if separate tax return was filed
- Unmarried biological parents of the dependent student who live together
- Both parents if married filing separate returns or neither filed a tax return
- Independent student and, if married, spouse, if filing separate tax returns or neither filed a tax return

Filing the FAFSA

Students **must file a FAFSA every year** they are enrolled in postsecondary education.

Apply online at:
[StudentAid.gov](https://studentaid.gov)

The screenshot shows the Federal Student Aid website interface. At the top, there is a navigation bar with the logo and links for 'FAFSA® Form', 'Grants and Loans', 'Loan Repayment', and 'Loan Forgiveness'. Below the navigation bar, a main heading reads 'Get Money To Help Pay for School', followed by a sub-heading: 'Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for financial aid for college, career school, or graduate school.' To the right of this text is a large graphic of the FAFSA logo with the word 'form' underneath. Below the heading, there are three main action buttons: 'Start a 2026–27 FAFSA® Form', 'Edit a 2026–27 FAFSA® Form', and 'Accept an Invitation for a 2026–27 FAFSA® Form'. Below these buttons, there is a section for 'Need the 2025–26 FAFSA Form?' with links for 'Start New Form', 'Edit Existing Forms', and 'Accept an Invitation'. The bottom section of the screenshot is a dark blue area titled 'Check FAFSA® Deadlines for the State You Live in'. It includes two dropdown menus for 'School Year' and 'State of Residence', a 'Find Deadlines' button, and a link to 'View All FAFSA Deadlines'. Below this, there are three white boxes with icons and text: 'Who should complete the FAFSA® form?' (with a person icon), 'How long will it take?' (with a clock icon and '30 minutes'), and 'What do I need?' (with a checklist icon and a bullet point: 'Verified account username and password (FSA ID)').

Documents Needed to Complete the FAFSA



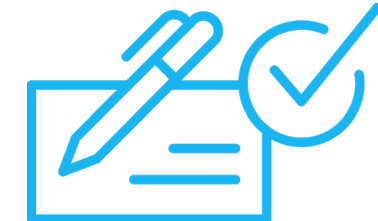
Social Security Numbers



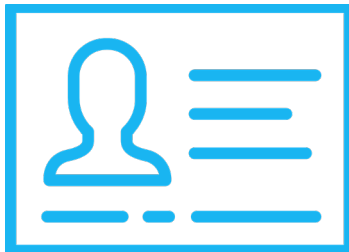
Email Addresses (Not high school email address)



2025 Federal Tax Returns and W-2's



Current bank statements and records of other investment accounts (as of the FAFSA filing date)



Student & Contributor(s) Federal Student Aid Account (FSA ID)



Current Records of any stocks, bonds and other investments, including 529 for student for whom the FAFSA is being completed



Total child support from the most recently complete calendar year

Prior-Prior Year—What to Use & When

Plan to Attend College From	Submit the FAFSA Form	Using Tax Information From
Jul 1, 2026–Jun 30, 2027	Oct 1, 2025–Jun 30, 2027	2024
Jul 1, 2027–Jun 30, 2028	Oct 1, 2026 –Jun 30, 2028	2025
Jul 1, 2028–Jun 30, 2029	Oct 1, 2027–Jun 30, 2029	2026

Benefits of Applying Online


- **Faster** than paper
 - Online help and skip logic assist applicants in completing accurately
- IRS data flows into the form
 - Allows the transfer of federal tax information to their FAFSA
- Easy to compare those schools included on FAFSA form
- The on-line application can be viewed in Spanish or English
- **Free**


Login

FAFSA[®] FORM 2026-27

Welcome, Alex,
to the FAFSA[®] Form

I am starting the FAFSA form as a

Student 

Parent 

Did you receive an invitation code?
[Enter Code](#)

[Previous](#) [Continue](#)

The FAFSA asks who is logging in—the **student** or **parent**?

REMEMBER:

A StudentAid.gov Account is required to be created prior to beginning the FAFSA.

FAFSA—6 Sections for Student

FAFSA[®] FORM 2026-27 Student Alex Tran Save | FAFSA Menu

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

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

Providing Consent & Approval

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

FAFSA ▾ Loans & Grants ▾ Repayment ▾ Loan Forgiveness ▾

Search 🔍 Raya ▾

FAFSA® Form 2026-27 Student Raya Tran

Save | FAFSA Menu

Provide Consent and Approval or You Won't Be Eligible for Federal Student Aid

Summary

Your consent and approval are needed to retrieve and disclose federal tax information. With your consent and approval, we can obtain tax return information automatically from the IRS to help you complete the FAFSA® form. If you don't provide consent and approval, you will not be eligible for federal student aid, including grants and loans. You must provide consent and approval even if you didn't file a U.S. federal tax return or any tax return.

- Get your 2024 tax return information for the 2026-27 FAFSA form.
- Tax return information is required to complete the FAFSA form.
- Federal tax information is used to determine your eligibility for federal student aid.

Select "Approve" to provide consent and approval for the use of your federal tax information to determine your eligibility for federal student aid. If you select "Decline," you will not be eligible for federal student aid.

Previous

Decline

Approve

An Approve button must be selected by the **student** and **all required contributors.**

Determining if Parental Contributor is Required

- A series of student questions to determine if parental contributor data is required
 - **Dependent**—include parental data
 - **Provisional Independent**
 - If they cannot provide parent info—
May be considered as a Provisionally Independent student and would need to work with the financial aid office to certify. This only needs to be done their first year of attendance (assuming they don't transfer to another school)
 - **Independent**—just student data



Determining if a Student is a Dependent or Independent

- Were you born before January 1, 2004?
 - This is not asked directly, but now auto calculates from the student's "Date of Birth," located on the form
- As of today, are you married?
 - This is now captured by the question regarding the student's marital status
- At the beginning of the 2027-28 academic year, will the student be working on a master's or doctorate program (such as an M.A., MBA, M.D., J.D., Ph.D., Ed.D., graduate certificate, etc.)?
- The student is currently serving on active duty in the U.S. Armed Forces for purposes other than training
- The student is a veteran of the U.S. Armed Forces

Determining if a Student is a Dependent or Independent


- The student has children or other people (excluding their spouse) who live with them and receive more than half of their support from the student now and between July 1, 2027, and June 30, 2028.
- At any time since the student turned 13, they were an orphan (no living biological or adoptive parent)
- At any time since the student turned 13, they were a ward of the court
- At any time since the student turned 13, they were in foster care
- The student is or was a legally emancipated minor, as determined by a court in their state of residence
- At any time on or after July 1, 2026, the student was unaccompanied and either homeless or self-supporting and at risk of being homeless
- The student is or was in a legal guardianship with someone other than their parent or stepparent, as determined by a court in their state of residence

Dependent Student Status

FAFSA[®] FORM 2026–27 Student Alex Tran Save FAFSA Menu

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

Your Dependency Status

 **Dependent Student**
Based on your answers, you're a dependent student. This means you must provide parent information on your FAFSA[®] form. This information helps determine how much federal student aid you're eligible to receive.

Direct Unsubsidized Loan Only

Are the student's parents refusing to provide their information on this FAFSA[®] form? ⓘ

This response must be "No" for the student to be considered for Federal Pell Grant eligibility and most other types of federal student aid.

Yes No

Previous Continue

Student Demographics

- The student will then be prompted to answer the FAFSA's Demographic Information questions. These include the following:
 - Student's gender
 - Student's race and ethnicity
 - Student's citizenship status
 - Parents education status
 - Parents killed in line of duty
 - Student high school completion status
 - Student's high school information

Student Financials Section

- The student is then asked questions about their 2025 tax return
- In consenting to the terms of the FAFSA, if the student filed a 2025 Federal tax return, that information will automatically be transferred from the IRS

The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. The top navigation bar includes the FAFSA logo, the form year (2026-27), the student's name, and options to Save or view the FAFSA Menu. A progress indicator at the top shows six steps: Personal Circumstances (1), Demographics (2), Financials (3), Colleges (4), Contributor Invite (5), and Signature (6). The current step is Financials, which is titled "Student 2024 Tax Return Information".

Below the title, a green box contains the instruction: "Refer to the student's 2024 tax return to answer the following questions. If the answer is zero or the question does not apply, enter 0." Below this is a link: "Where to find this information on the tax form".

The "Filing Status" section has five radio button options: Single (selected), Head of household, Married filing jointly, Married filing separately, and Qualifying surviving spouse.

The "Income Earned From Work" section includes a note: "IRS Form 1040 (or 1040-NR): Line 1z + Schedule 1: Lines 3 + 6. If a tax form line's value is negative, treat it as zero in your calculation." Below this is a text input field with a dollar sign on the left and a decimal field on the right, currently showing "1,000 .00".

IRS Direct Data Exchange

- Students and parents can transfer IRS tax return income directly into the FAFSA
 - The student and ALL contributors must consent to have tax information transferred
- The data exchange with the IRS may not work if the student or parent:
 - FAFSA marital status doesn't match Prior Prior Year IRS tax status
 - Married and filed as Head of Household
 - Filed a Puerto Rican or foreign tax return



Tax filers flagged due to identity theft can't have IRS Data transferred

Student Financials—Asset Information

FAFSA[®] FORM 2026–27 Student Alex Tran Save FAFSA Menu

Personal Demographics **3 Financials** 4 Colleges 5 Contributor Invite 6 Signature

Student Assets

Current Total of Cash, Savings, and Checking Accounts
Don't include student aid, retirement accounts, or investments.

\$ 800 .00 ⓘ

Current Net Worth of Investments, Including Real Estate
Don't include the home the student 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 student'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

School Selection

Students may list
up to 20 schools
on their FAFSA.

Postsecondary schools
will **not** see that other
schools are listed.

The screenshot shows the FAFSA 2026-27 'Colleges' step for Student Alex Tran. The progress bar indicates steps 1-3 are complete, step 4 is active, and steps 5 and 6 are pending. The section is titled 'Selected Colleges and Career Schools' and includes a note about reviewing the list. A green box contains 'School List Guidelines for Texas Residents'. A summary bar shows '4 out of 20 schools selected'. Below, a list of 4 schools is shown with 'Remove' and 'View Information' options for each.

School Name	Location	Federal School Code	Remove	View Information
American Career College	Ontario, California (CA)	039713		View Information
American College of Healthcare and Techn	Riverside, California (CA)	031444		View Information
American Conservatory Theater Foundation	San Francisco, California (CA)	014545		View Information
American Film Institute	Los Angeles, California (CA)	G22220		View Information

Parent Contributor

FAFSA[®] FORM 2026–27 Student Alex Tran Save FAFSA Menu

Personal Circumstances Demographics Financials Colleges **Contributor Invite** Signature


Invite a Parent as a Contributor

A contributor is anyone who's required to provide information on your FAFSA form. You must invite a legal parent—a biological or adoptive parent as determined by the state.

Stepparents and other types of guardians do not count unless they have legally adopted the student.

Who counts as a parent on the FAFSA form?

[Previous](#) [Continue](#)



Invite Parent Contributor

FAFSA[®] FORM 2026-27 Student Alex Tran Save FAFSA Menu

Personal Demographics Financials Colleges **Contributor Invite** Signature

Invite Your Parent to This FAFSA[®] Form

To determine your federal student aid eligibility, we need more information on your household financial situation. You'll need to invite a contributor to provide this information.

As a dependent student, you need to invite a legal parent as a contributor. You only need to invite one parent.

Who counts as a parent on the FAFSA form?

Parent

Invite a Parent Contributor

Email

Send Invite

FAFSA[®] FORM 2026-27 Student Alex Tran Save FAFSA Menu

Personal Demographics Financials Colleges **Contributor Invite** Signature

Invite Your Parent to This FAFSA[®] Form

To determine your federal student aid eligibility, we need more information on your household financial situation. You'll need to invite a contributor to provide this information.

As a dependent student, you need to invite a legal parent as a contributor. You only need to invite one parent.

Who counts as a parent on the FAFSA form?

Parent

Send Invite to 599887939test@testcod.edu?

We'll send an invitation link and an access code to this email address.

Go Back Send Invite

Parent Contributor Invite

FAFSA[®] FORM 2026–27 Student Alex Tran Save FAFSA Menu

Personal Demographics Financials Colleges Contributor Invite Signature

Parent Contributor

Once your parent accepts the invitation, they can complete the parent section of this FAFSA form.

They may be asked to invite their spouse as a contributor too. You can check the status of contributor invitations from the "My Activity" page.

Parent

599887939test@testcod.edu

Invite Sent

Other Ways to Send the Invite ^

Copy and Send the Invite Link ⓘ

www.fafsa.gov/invite/7NDNUKA Copy Link

You can also have them go to www.fafsa.gov/invite and enter code:

7NDNUKA

Cancel Invite

Updated Notification of Pending Submission

FAFSA[®] FORM 2026-27 Student Alex Tran Save | FAFSA Menu

Student Section 2 Parent Section

Pending Submission

Check With Your Contributor

Parent Contributors

Requirements for Dependent Students
Your FAFSA[®] form can't be submitted until your contributor(s) fill out their section of the form and sign it. The last contributor to sign will be able to submit the form for processing.

Contributor(s)	Role	Invite Code	Status
599887939test@testcod.edu	Parent	7NDNUKA	Invite Sent

[Manage Invitations](#)

Track and Manage Your FAFSA[®] Form and Contributors
Your application has been added to the "My Activity" page in your StudentAid.gov account. Visit this page to keep track of your FAFSA status; review, edit, or delete information on your form; and monitor the status of your contributor(s).

[View Status](#)

Parental Consent

- Once the parents accept the invitation **utilizing their unique code**, they are asked to provide consent for their tax information to be retrieved from the IRS
- Failure to consent will make the student ineligible for Federal Aid

The screenshot shows the FAFSA 2026-27 parental consent page for Alex Tran. The page title is "Provide Consent and Approval or the Student Won't Be Eligible for Federal Student Aid". A green box highlights the "Summary" section, which explains that parental consent is needed to retrieve and disclose federal tax information from the IRS. It states that without consent, the student will not be eligible for federal student aid, including grants and loans. Three key points are listed: 1) Get your 2024 tax return information for the 2026-27 FAFSA form. 2) Tax return information is required to complete the FAFSA form. 3) Federal tax information is used to determine the student's eligibility for federal student aid. Below the summary, the user is asked to consent to the disclosure of information about them and to affirmatively approve of the receipt and use of their federal tax information, and the redisclosure of that information by the U.S. Department of Education (ED). The user is also asked to consent to and affirmatively approve of, as applicable, the following: 1. ED may disclose their Social Security number/Individual Taxpayer Identification Number, last name, date of birth, unique identifier, the tax year for which federal tax information is required, and the date and timestamp of their approval for the use of their federal tax information in determining eligibility by ED for which approval is provided to the U.S. Department of the Treasury, Internal Revenue Service (IRS). I understand that in response to such a request from ED, the IRS shall then disclose my federal tax information to "authorized persons" (i.e., specifically designated officers and employees of ED and its contractors [as defined in 26 U.S.C. § 6103(l)(13)(E)]) for the purpose of determining eligibility for and the amount of federal student aid under a program authorized under subpart 1 of part A, part C, or part D of Title IV of the Higher Education Act of 1965, as amended, for myself or an applicant for federal student

Parent Demographics

FAFSA[®] Form 2026-27 Parent of Sam Clark Save FAFSA Menu

1 Demographics 2 Financials 3 Signature

Parent Current Marital Status

Single (never married)

Unmarried and both legal parents living together

Married (not separated)

Remarried

Separated

Divorced

Widowed

Previous Continue

- The Parent has 3 sections to complete:
 - Parent Demographics
 - Parent Financials
 - Signature
- The parent is asked about their current marital status
- Parent answers demographic questions before advancing to the Financials portion of the FAFSA


Parent Financials—Family Size

FAFSA[®] FORM 2026–27 Parent of Alex Tran Save FAFSA Menu

Demographics Financials 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.

ⓘ

Previous Continue

Parent Tax Return Information

- The parent is asked questions about their 2025 tax return. They enter a response in each entry field.

The screenshot shows the FAFSA 2026-27 interface for a parent named Alex Tran. The page is titled "Parent 2024 Tax Return Information" and includes a progress bar with three steps: Demographics (completed), Financials (current), and Signature. A green box instructs the user to refer to the parent's 2024 tax return and to enter 0 if the answer is zero or the question does not apply. The "Report Combined Taxes" section asks for combined tax information for the parent and their spouse. Below this, there is a link to "Where to find this information on the tax form". The "Filing Status" section has five radio button options: Single, Head of household, Married filing jointly (selected), Married filing separately, and Qualifying surviving spouse. The "Income Earned From Work" section includes instructions to refer to IRS Form 1040 (or 1040-NR) Line 1 + Schedule 1: Lines 3 - 6 and a text input field with a dollar sign, a numeric field containing "40,000", and a decimal field containing ".00". The "Tax Exempt Interest Income" section includes instructions to refer to IRS Form 1040: Line 2a and a text input field with a dollar sign, a numeric field containing "1,000", and a decimal field containing ".00".

Parent Financials – Asset Information

FAFSA[®] FORM 2026–27 Parent of Alex Tran Save FAFSA Menu

Demographics 2 Financials 3 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

Parents Signature

- Parents are asked to sign and submit their section of the FAFSA

The screenshot shows the FAFSA 2026-27 interface for a parent of Alex Tran. The page is titled "Sign and Submit the FAFSA Form" and features a progress bar with three steps: Demographics, Financials, and Signature (the current step). A green box highlights the "Summary" section, which states: "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." Below this, the user is asked to certify that the information provided is true and complete, and to provide information that will verify the accuracy of the completed form, and U.S. or foreign income tax forms that you filed or are required to file. The user is also asked to certify that they understand that the secretary of education has the authority to verify information reported on their application. Finally, the user is asked to sign for themselves and submit the application for Alex Tran (Student). A checkbox is present for the statement: "I, Alcina Tran, agree to the terms outlined above."

Confirmation Page When Parent Submits the FAFSA

FAFSA FORM 2026–27 Parent of Alex Tran Exit FAFSA Menu

Congratulations,
the FAFSA® Form Is Complete!

Alex Tran

Completion Date
07/17/2025

What Happens Next

- Email Sent**
Confirm that the student received an email version of this page.
- The Student Can Track the Status of Their Form**
In one to three days, the student's FAFSA form will be processed and made available to their schools.
- The Student Will Receive School Communications**
We use the information collected on the student's FAFSA form to calculate their Student Aid Index (SAI). The SAI lets schools determine how much aid the student is eligible to receive. Schools will reach out to the student if they need more information. They will also contact the student with financial aid offers. Once received, the student can contact their financial aid offices directly to ask questions about their student aid packages.

Track and Manage the Student's FAFSA® Form
You can check the status of the student's application in the "My Activity" section of your account Dashboard. We will let you know if we need anything more from you.

[View Status](#)

Confirmation page will be emailed and is available if the student logs into StudentAid.gov



Applicants should allow or enable pop-ups from StudentAid.gov prior to completing the FAFSA, to ensure they are able to view all beneficial information.

PA State Grant Application Process

In addition to the FAFSA, first-time applicants, as well as some renewal applicants, must complete the **PA State Grant Application Process**.

Steps to apply for PA State Grant

1. Complete the FAFSA by the appropriate filing deadline.
2. Wait for an email from PHEAA with a link to activate your PA State Grant System account. The email will be sent to the address provided on your FAFSA.
3. Review and complete items listed on your dashboard.

Students should be advised to watch for email messages and standard mail from PHEAA regarding their PA State Grant status and to respond to requests for information as quickly as possible. Students with incomplete applications will not be considered for state grant funds. Additional details on how to apply for a PA State Grant can be found at pheaa.org

FAFSA Federal Resources

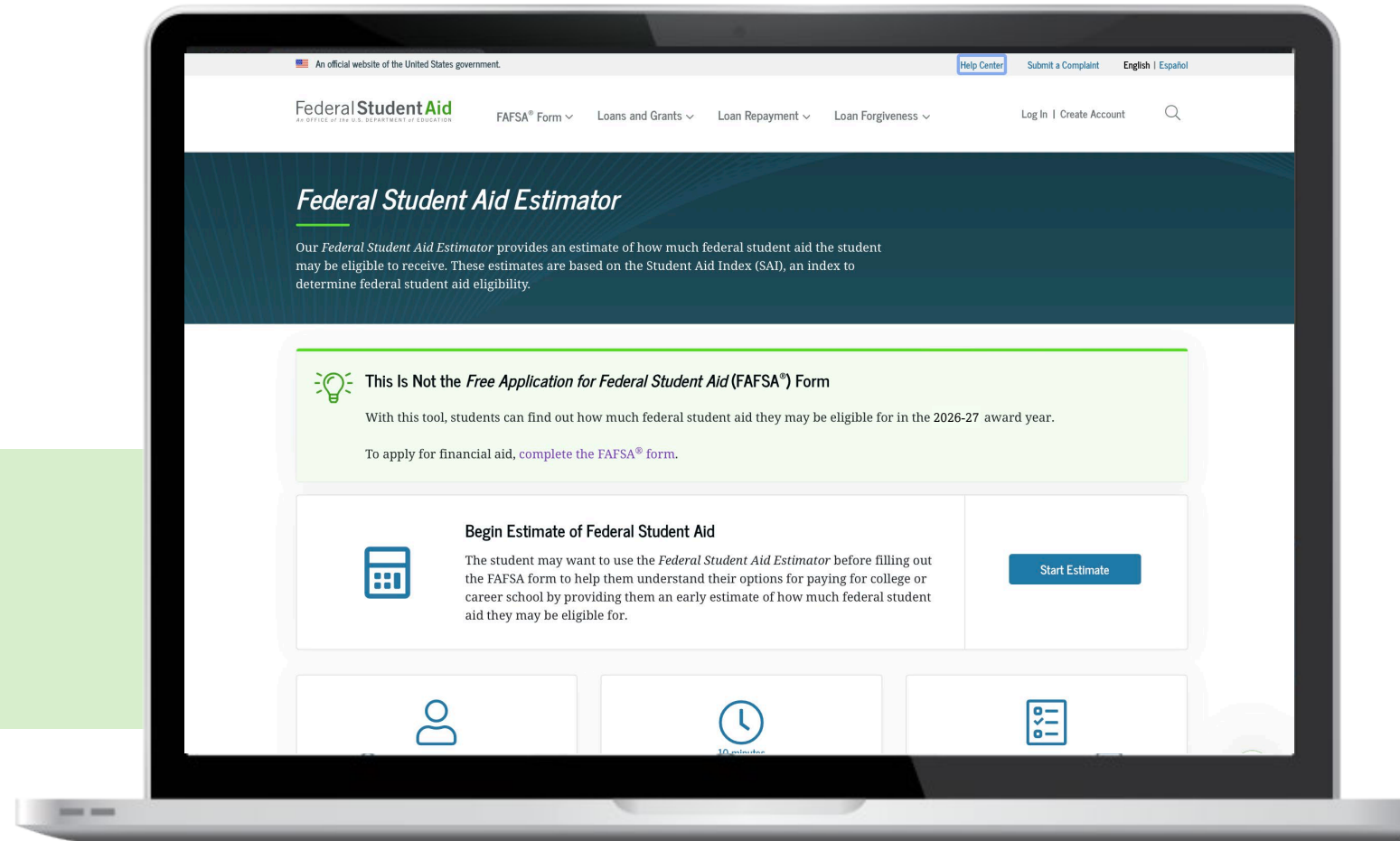
Free publications for secondary and postsecondary students are available for download in Spanish and English at:

- [FinancialAidToolkit.ed.gov](https://www.financialaidtoolkit.ed.gov)
 - Searchable database of outreach resources
 - FSA's YouTube Channel has helpful videos exploring different types of financial aid
- Federal Contact Assistance
 - [StudentAid.gov](https://studentaid.gov)
 - Email or chat
 - Phone: 1-800-433-3243

Federal Student Aid Estimator

The Federal Student Aid Estimator provides an **estimate** of the federal student aid a student may be eligible to receive

Visit
[StudentAid.gov](https://studentaid.gov)



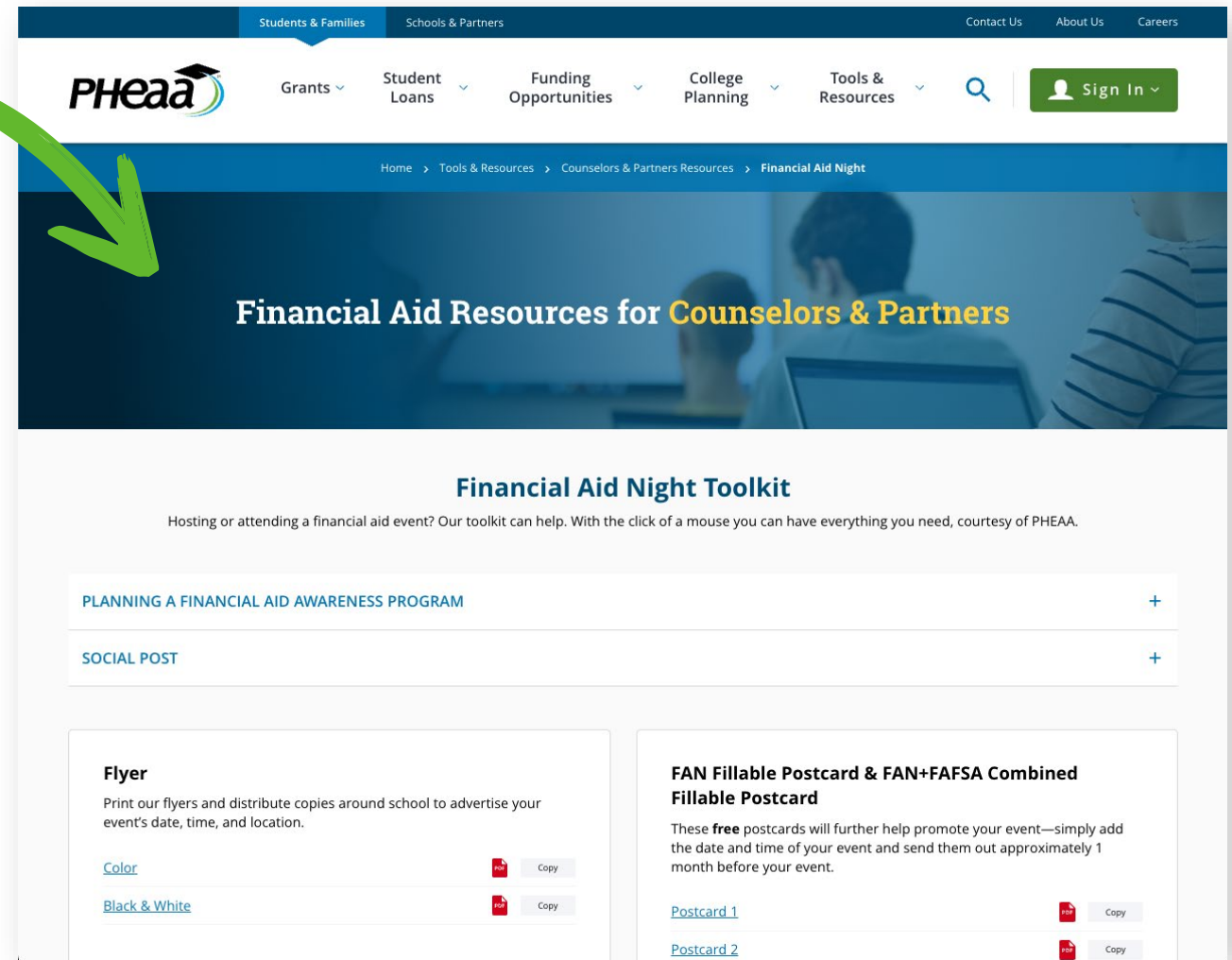
Promote FAFSA Filing

PHEAA Products & Services



PHEAA Toolkits

- [Financial Aid Night Toolkit](#)
- [FAFSA Toolkit](#)
 - Includes PDFs, flyers, ads for school publications, newspaper articles and planning information
- [Career Education and Work Standards Toolkits](#) (Chapter 339 materials)
 - Includes free materials and lesson plans to help students meet the academic and career standards developed by the PA Department of Education



The screenshot shows the PHEAA website interface. At the top, there is a navigation bar with links for 'Students & Families', 'Schools & Partners', 'Contact Us', 'About Us', and 'Careers'. Below this is a secondary navigation bar with 'PHEAA' logo and dropdown menus for 'Grants', 'Student Loans', 'Funding Opportunities', 'College Planning', and 'Tools & Resources'. A search icon and a 'Sign In' button are also present. The main content area features a blue header with the text 'Financial Aid Resources for Counselors & Partners'. Below this, the 'Financial Aid Night Toolkit' section is highlighted, with a green arrow pointing to it from the list on the left. The toolkit description reads: 'Hosting or attending a financial aid event? Our toolkit can help. With the click of a mouse you can have everything you need, courtesy of PHEAA.' Below the description are two expandable sections: 'PLANNING A FINANCIAL AID AWARENESS PROGRAM' and 'SOCIAL POST'. The 'Flyer' section offers 'Color' and 'Black & White' options, each with a 'Copy' button. The 'FAN Fillable Postcard & FAN+FAFSA Combined Fillable Postcard' section provides instructions and offers two postcard options, each with a 'Copy' button.

PHEAA Materials

PHEAA offers a large variety of materials that are **free** to order at PHEAA.org/order-online.



Alternative Materials



Higher Education Access Corner Podcast

- Higher Education Access Corner provides candid conversations around higher education access and affordability. Tune in to hear a variety of engaging discussions with industry professionals, as well as how PHEAA helps create affordable access to higher education.
- Available on Spotify, Google Podcasts, Anchor, iHeartRadio, and Amazon Music.
- Subscribe and listen on your favorite podcast app or streaming platform! pheaa.org/tools-resources/podcasts/index.shtml

Helping Students & Families

- Financial Aid Nights
- FAFSA Completion Sessions
- Junior Jump Starts
- Student Programs
 - EducationPlanner—Scholarship Search
 - MySmartBorrowing—Financial Literacy



FAFSA Completion Services

- Students and their parents (or guardians) receive FREE assistance with completing the FAFSA
- Students and parents need to have their StudentAid.gov account (formerly FSA ID) created and verified **prior** to attending the session
- PHEAA's FAFSA Tipsheet contains information on what documents and other information will be needed to complete the online process
- Information about upcoming FAFSA Completion Sessions can be found at pheaa.org/fafsa-events
- Contact PHEAA Higher Education Access Partner for more details on these sessions

Online High School Access

Track FAFSA completions through Business Partner Access Management System (BPAMS)

Student's first, middle, and last name	Date FAFSA processed
Date of birth	Flag for additional information
Zip code only	FAFSA status flag
Date FAFSA submitted	Must complete RAA and ASF with PHEAA

2021-22 FAFSA COMPLETION DATA
08/23/2021

SCHOOL CODE: 123456
MAIN CODE :
SCHOOL NAME: SAMPLE SENIOR HIGH SCHOOL

PAGE: 1

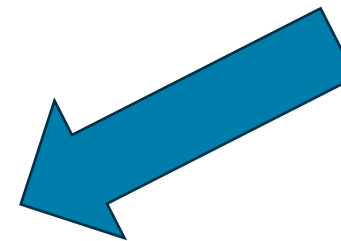
NAME	DATE OF BIRTH	ZIP CODE	DATE SUBMITTED	DATE PROCESSED	SELECTED FOR VERIFICATION	FAFSA COMPLETE
ASTUDENT, VICTORIA H	10/17/2001	19046	08/15/2021	08/16/2021	N	Y
BSTUDENT, LILLY A	03/19/2003	19046	11/11/2020	11/12/2020	N	Y
CSTUDENT, RAMIZ	11/19/2002	19046	02/26/2021	04/19/2021	Y	Y
ANDERSEN, PARKER R	12/14/2002	19001	01/13/2021	01/14/2021	N	Y
DSTUDENT, YIWALO ARSEN	10/21/2002	19006	05/20/2021	06/15/2021	Y	Y
ESTUDENT, JANELLE	01/27/2003	19038	10/24/2020	05/19/2021	Y	Y

FAFSA Reporting Overview for Educators and Counselors

May 27, 2026

10 – 11 a.m.

- To support schools with the universal Free Application for Federal Student Aid (FAFSA®) requirement in Pennsylvania for the upcoming school year, PHEAA will present information to counselors on the steps to get access to FAFSA completion reporting and how to view the information on our website.
- Register at pheaa.org/virtual



Scan to register!

Questions

Presenters:

Amy Kotzev (Sawdey)

Higher Education Access Partner
Allegheny County

Evelyn Disla-Hernandez

Higher Education Access Partner
Carbon, Lehigh, Monroe, Montgomery, Northampton, and Pike Counties

*Find your Access Partner
contact information here:*





Questions

Counseling Scenarios

Scenario 1

Question: Nancy lives with both parents, but they are not married. Whose information goes on the FAFSA?

Answer: Both parent's information is used in this case and they both need separate Studentaid.gov accounts.

Counseling Scenarios

Scenario 2

Question: Kurt is a HS senior who lives at home with his parents. However, Kurt's parents don't plan to contribute to tuition or school expenses and have told Kurt that they don't want to provide their information on the 2026–27 FAFSA. What will happen if Kurt's parents refuse to be contributors on the FAFSA?

- A. Kurt will receive temporary independent student status.
- B. Kurt will be eligible for subsidized loans only.
- C. Kurt will be ineligible for federal student aid.
- D. Kurt can ask another relative to be a contributor instead.

Answer: The answer is C. If Kurt's parents won't be contributors and complete their required sections of the 2026–27 FAFSA, it will result in an incomplete application and Kurt will be ineligible for federal student aid. Kurt should remind both parents that participating as contributors doesn't indicate any financial responsibility. If the parents continue to refuse, Kurt has the option to revise previously entered answers on the FAFSA to apply for unsubsidized loans only. Doing this will remove the contributor requirement. For guidance, Kurt should contact the school's financial aid office.

Counseling Scenarios

Scenario 3

Question: Student Julie wants to file her FAFSA. Her parents are divorced, and neither is remarried. Julie was living with her father until two weeks ago. He took a job in a different state, and Julie has moved in with her mother and will live there until she graduates from high school. Julie's father continues to provide the greater amount towards her cost of care. Which parent should Julie include in the FAFSA? Is Julie eligible to apply for PA State aid?

Answer: Julie's father will be the contributor on her FAFSA as he provided the most financial support over the past twelve months. She is eligible to apply for PA State aid based on domicile of the student and the parent she is now living with.

Counseling Scenarios

Scenario 4

Question: Student Ronald is ready to file his FAFSA. Ronald is a U.S. citizen, but his parents are undocumented. His parents did not file taxes and so they do not have ITINs. What should they do next?

Answer: Since neither parent filed taxes, both would need to create StudentAid.gov accounts. When creating a StudentAid.gov Account, they would need to select that they don't have a Social Security Number. If the credit bureau cannot verify their identity, they will need to provide the appropriate documentation to Federal Student Aid.

Counseling Scenarios

Scenario 5

Question: Student Sonya is in the process of filling out her FAFSA. She is a dependent student, and her parents filed a joint tax return for 2024. The parent's email address is required to send the invitation. She fills in the information for her mother, but her mother does not receive an invitation to provide information in Sonya's FAFSA. What could be the reasons that her mother did not receive the invitation? How could Sonya fix the situation so that her mother gets the invitation?

Answer: Sonya potentially listed her mother's email address incorrectly, which can be fixed by Sonya signing in to her FAFSA application and updating the email address or by adding a different email address for her mother. Additionally, the email may have been flagged as spam by mom's email account. However, Sonya's mother can directly access the invitation by signing in to StudentAid.gov with her StudentAid.gov account. Under her My Activity page she will be able to accept the invitation and provide the required information.

Counseling Scenarios

Scenario 6

Question: Student Michael wants to file his FAFSA. Michael's mother and father have been separated for a year and live in separate locations. Michael's mother indicates that each parent provides an equal amount of financial support for Michael, and their shared custody arrangement means that Michael lives an equal amount of time with each parent. How would they determine who should be the contributor on Michael's FAFSA? What is the rationale?

Answer: If both parents provided an equal amount of financial support for Michael, the contributing parent would need to be the one with the greater income and assets.

Counseling Scenarios

Scenario 7

Question: The student lived with two moms who were legally married and filed a joint income tax return in the calendar year prior to filing the FAFSA. One mom has died prior to filing the FAFSA. Can the surviving parent from a same-sex marriage be considered the Parent of Record on the FAFSA?

Answer: It depends, you must determine whether the surviving mom was the student's biological or adoptive parent or is listed on the student's birth certificate. If the surviving mom is the biological parent, has adopted the student, or is listed on the student's birth certificate as allowed by the state, then she is the student's parent for purposes of completing the FAFSA.

However, if the surviving mom is **not** the biological parent, has never adopted the student, and is not listed on the student's birth certificate, then the student's parent for purposes of completing the FAFSA reverts to the student's biological father. If the student's biological father is also deceased, the student is independent (because she is an orphan).

Counseling Scenarios

Scenario 8

Question: Student Evelyn has finished the student section of the FAFSA and now has to complete the parent section. Evelyn lives with her mother and stepfather, who married in February 2025. Her biological father is deceased. In 2024, her mother and stepfather did not file their taxes together. What will be the process to enter the parent income information on the FAFSA?

Answer: Evelyn will need to invite both her mother and stepfather to be contributors on the FAFSA, and each would need to create their own individual StudentAid.gov account to transfer their Federal Tax Information (FTI) directly into the FAFSA.

Counselor Scenarios

Scenario 9

Question: Student Wendy is homeless and currently living with a friend's family in the school district. She has been deemed homeless by the school district as an unaccompanied homeless youth. Can she file the FAFSA as an independent student?

Answer: Yes. On the FAFSA, Wendy would answer yes to the question, "At any time on or after July 1, 2025, was the student unaccompanied and either (1) homeless or (2) self-supporting and at risk of being homeless?" Wendy should then indicate if any of the following determined she was homeless or at risk of becoming homeless:

- Director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving those experiencing homelessness
- The student's high school or school district homeless liaison or designee Director or designee of a project supported by a federal TRIO or GEAR UP program grant FAA.

If Wendy had not received a determination from any of the persons listed above, she would need to contact the Financial Aid Administrator at her schools of choice. The schools will make this determination.

Counseling Scenarios

Scenario 10

Question: Student Ed has parents that have been separated for almost two years. Ed lives with his father and does not receive any financial support from his mother. Ed's two younger siblings also live in the household. The father claims all the children on his federal tax return. Ed's parent's tax filing status for the last two years has been married filing jointly since they have not officially divorced. How should Ed determine the family size to be reported? As the contributor on Ed's FASFA, how will his father report his income information?

Answer: Because Ed's father's marital status conflicts with his tax filing status of married filing joint, he will be prompted to manually enter his federal tax information. Since his FTI is not being transferred, he will need to enter his family size.