

FAFSA Checklist for 2023-2024

Apply Online: studentaid.gov Questions: 1-800-433-3243

IRS Data Retrieval Process - The FAFSA has a tool within the application that allows applicants to transfer tax information directly into FAFSA. This tool does not work for every applicant. If this is the case, the required information must be entered by hand.

Information needed for the Data Retrieval Process:

- Student's Social Security Number and date of birth
- User IDs and passwords for both parent and student
- Copy of parent and student (if applicable) income taxes/ W-2s

Answer the filtering questions provided. Be sure to enter the address EXACTLY as it appears on the tax return.

- Follow the instructions to complete the process.
- After the IRS has validated your identification, your IRS tax information will display.
- You can transfer the information from the IRS or return to FAFSA on the Web.
- If you transfer your tax information, questions that are populated with that information will be marked "transferred from the IRS."
- Once the data retrieval is complete, check each field for accuracy and complete any questions required. Do not change any data transferred from the IRS.

Information needed to complete the FAFSA if you are unable to use the Data Retrieval Tool:

- Your Social Security Number or Alien Registration Number if not a citizen
- The most recent federal income tax returns, W-2s and other records of money earned.
- Bank statements and records of investments (if applicable)
- Records of untaxed income (if applicable)
- A Federal Student Aid User ID and Password to sign electronically.
- If you are a dependent student, you will also need most of the above information for your parents.



The **Free Application for Federal Student Aid** (FAFSA) is used to apply for federal, state and college-based financial aid.

It is best to complete the application process as soon as possible after October 1, 2022 for the 2023-2024 school year.

Tax return information from 2021 will be needed to complete the application questions. It may be possible to transfer the federal tax return information into FAFSA using the IRS Data Retrieval Tool.

The Application Process

Two Step Guide

*Create an ID

*Fill out the Application

FAFSA

FSA ID GUIDE - Student Notes

Federal Student Aid (FSA) ID's are required for students and parents to electronically sign the FAFSA. One parent of the dependent student will need to create an FSA ID.

**Keep this information in a safe place as it will be used yearly to reapply for and sign the FAFSA application.*

1 ENTER AN EMAIL ADDRESS _____

The email address must be unique to each individual. The parent and student can not use the same email. Students should not use high school email accounts.

2 CREATE A USERNAME _____

Must be 6-30 characters. Avoid using personal identifiers like names and birthdates.

3 CREATE A PASSWORD _____

Must be 8 -30 characters. Avoid using personal identifiers.

4 COMPLETE YOUR PROFILE.

1. Enter your social security number.
2. Enter your birthdate.
3. Enter your name exactly as it appears on your social security card.

5 CHALLENGE QUESTIONS & ANSWERS

There are four challenge questions and answers. Select the questions from the drop down menus and provide your answers below.

1. _____
2. _____
3. _____
4. _____

6 VERIFY YOUR EMAIL ADDRESS & MOBILE PHONE NUMBER.

FSA will send an email with a code that must be entered to verify your email address. FSA will send a text message with a code that must be used to verify your mobile phone number. Your FSA ID is ready to use!

FSA ID GUIDE - Parent Notes

1 ENTER AN EMAIL ADDRESS _____

The email address must be unique to each individual. The parent and student can not use the same email. Students should not use high school email accounts.

2 CREATE A USERNAME _____

Must be 6-30 characters. Avoid using personal identifiers like names and birthdates.

3 CREATE A PASSWORD _____

Must be 8 -30 characters. Avoid using personal identifiers.

4 COMPLETE YOUR PROFILE.

1. Enter your social security number.
2. Enter your birthdate.
3. Enter your name exactly as it appears on your social security card.

5 CHALLENGE QUESTIONS & ANSWERS

There are four challenge questions and answers. Select the questions from the drop down menus and provide your answers below.

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6 VERIFY YOUR EMAIL ADDRESS & MOBILE PHONE NUMBER.

FSA will send an email with a code that must be entered to verify your email address. FSA will send a text message with a code that must be used to verify your mobile phone number. Your FSA ID is ready to use!

You may be asked to provide your drivers license number

*Keep this information in a secure location**