



# FAFSA Checklist 2018–2019

FOR SCHOOL YEAR 2018–2019 : COMPLETE THE FAFSA STARTING OCT. 1, 2017!

Go to **FAFSA.GOV** to create your Federal Student Aid ID (FSA ID) and start your FAFSA.

The Free Application for Federal Student Aid (FAFSA) is used to apply for federal, state and college-based financial aid. You should file a FAFSA starting Oct. 1, 2017.

## What you will need:

- FSA ID for **both** the student and the dependent student's parent/stepparent
- Your Social Security number
- Your alien registration number (if you are not a U.S. citizen)
- Your 2016 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)
- Parents' date of birth, social security number, marital status, and date parent was married, divorced, or widowed

## How long will it take?



FSA ID:

**20 minutes**

Initial Application:

**30 minutes**

Renewal Application:

**20 minutes**

FAFSA Corrections:

**10 minutes**

**Need help? Call 800.433.3243**

# Federal Student Aid ID

Apply online at [fsaid.ed.gov](https://fsaid.ed.gov).

Use your FSA ID to confirm your identity when you access your financial aid information and electronically sign your federal student aid documents, including the FAFSA.

Both the student and at least one parent of a dependent student will need to create an FSA ID. Go to [fsaid.ed.gov](https://fsaid.ed.gov) to create a FSA ID.

*Set up active email accounts for both the student and one parent before applying for the FSA ID.*

## Are you dependent or independent?

If you answer "Yes" to any question below, you are considered an independent student.

- ☐ Were you born before January 1, 1995?
- ☐ As of today, are you married? (Answer "Yes" if you are separated but not divorced.)
- ☐ At the beginning of the 2018–2019 school year, will you be working on a master's or doctoral program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?
- ☐ Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
- ☐ Are you a veteran of the U.S. Armed Forces?
- ☐ Do you now have or will you have children who will receive more than half of their support from you between July 1, 2018, and June 30, 2019?
- ☐ Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2019?
- ☐ At any time since you turned age 13 were both of your parents deceased, or were you in foster care, or were you a dependent or ward of the court?
- ☐ As determined by a court in your state of legal residence, are you now or were you, upon reaching the age of majority, an emancipated minor (released from control by your parent or guardian)?
- ☐ As determined by a court in your legal state of residence, are you now or were you, upon reaching the age of majority, in legal guardianship (of someone other than your parent or stepparent)? Note: Custody is different from guardianship.
- ☐ At any time on or after July 1, 2017, did your high school or school district homeless liaison, the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development, the director of a runaway or homeless youth basic center, or transitional living program or a college financial aid administrator determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?

## Notes

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## Whose information do I use?

The intent of the FAFSA is to get an idea of the student's household income. Use the guide on page 2 to determine if you are a dependent student. Use this guide to figure out which parent's information to include.

- ☐ Are your parents married to each other? If yes, then report information for both parents on the FAFSA.
- ☐ Do your parents live together? If yes, then report information for both parents on the FAFSA, even if they were never married, are divorced, or are separated.
- ☐ Did you live with one parent more than the other over the past 12 months? If yes, then report information on the FAFSA for the parent you lived with more. Also, if this parent remarried, you will need to report information for your stepparent on the FAFSA even though he or she is not responsible for your college costs. If no, then report information on the FAFSA for the parent who provided more financial support over the past 12 months or in the last year you received support. Also, if this parent is remarried, you will need to report information for your stepparent on the FAFSA.
- ☐ Are you married? If yes, report your spouse's income.
- ☐ Are you 24 or older? Use only your income unless you are married.

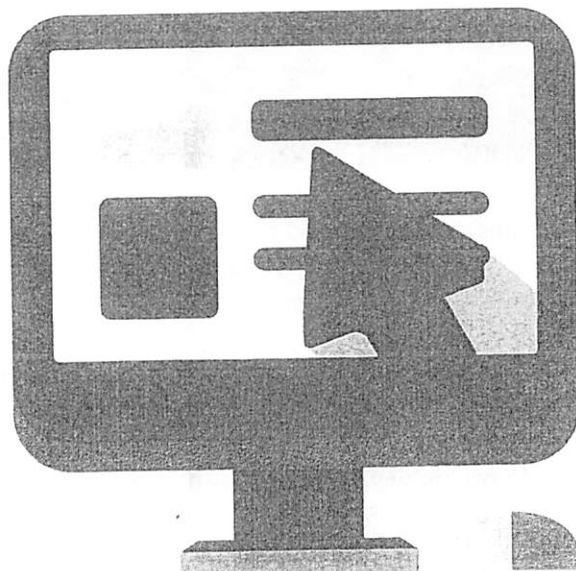
The following people are not your parents unless they have legally adopted you:

- ☐ Widowed stepparents
- ☐ Grandparents
- ☐ Foster Parents
- ☐ Legal Guardians
- ☐ Older brothers or sisters
- ☐ Aunts or Uncles

## IRS Data Retrieval Tool

Use the IRS Data Retrieval Tool to complete income tax information:

1. Answer the filtering questions to determine if you are eligible to use the IRS Data Retrieval Tool.
2. If eligible, select which parent's FSA ID will be used.
3. Enter the parent's FSA ID and password.
4. Click "Link to IRS."
5. Review the information displayed and select the "Transfer My Information into the FAFSA" option. **Do not edit transferred information.** *Note: Be sure to enter your address exactly as it appears on the tax return.*
6. Once the data retrieval is complete, check each field for accuracy and complete any questions requiring information not transferred from the IRS. *Note: Do not change any data transferred from the IRS.*



## Helpful Hints

- Make sure that you select the correct form. High school seniors graduating in 2018 will need to complete the 2018–2019 FAFSA.
- Always log in with an FSA ID and not personal identifiers to reduce the margin of error
- Keep track of all usernames and passwords in a safe, secure place. You will need your FSA ID every year you complete a FAFSA, as well as to log in to all Department of Education websites.
- Use a personal email (not school) that you check often for the FSA ID and the FAFSA. You will receive IMPORTANT information and directions via email.
- To navigate through the FAFSA, use the NEXT and PREVIOUS buttons at the bottom of each page. DO NOT use the back arrow in your internet browser.
- To get clarification and guidance for each data field, click in the data box. The HELP text will appear to the right of the screen.
- The left side of the screen will indicate whose information is needed on that page. It will say either STUDENT (in blue) or PARENT (in purple). When the FAFSA says “you,” it is referring to the student (not the parent).
- Name and Social Security number need to match what is on your Social Security card.
- The grade level for high school seniors and first-year students will be “Never attended college and 1st year undergraduate” even if you have taken AP or dual credit courses.
- The question “What degree or certificate will you be working on when you begin the 2018–2019 school year?” is referring to the category or type of program and NOT college major. Refrain from choosing “Other/undecided.” **First-year college students will not be in a graduate program.**
- Tax filers should use the IRS Data Retrieval Tool to transfer income information from the IRS to the FAFSA if possible (both student and parent).
- Asset net worth means current value of the assets minus what is owed on those assets.
- Assets include: money in cash, savings, and checking accounts; businesses (over 100 employees); investment farms; other investments, such as real estate (other than the home in which you live); UGMA and UTMA accounts for which you are the owner; stocks, bonds, certificates of deposit, etc.
- Assets do not include: the home or farm in which you live; UGMA and UTMA accounts for which you are the custodian but not the owner; value of life insurance; retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.)
- Look for a confirmation page and review, as an indicator the FAFSA was submitted correctly.

## Verification Process

Colleges are required to verify the information provided on some FAFSAs. Most people selected for verification are picked at random.

If you're selected for verification, you'll be contacted by the college. The college or, in some cases, an agency with which the college has contracted will let you know what forms and information you need to supply.

For more information about college planning services and financial aid programs available to Kentucky students, please call 800.928.8926 or visit [kheaa.com](http://kheaa.com).

IT IS IMPORTANT TO COMPLETE VERIFICATION AS SOON AS YOU'RE NOTIFIED SO THERE ARE NO DELAYS WITH YOUR FINANCIAL AID.



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