

# 2022/23 Financial aid application worksheet

The Free Application for Federal Student Aid Application (FAFSA) is the doorway to all federal financial aid, including loans, grants and work-study opportunities. Most states and colleges also use FAFSA submissions to determine financial aid. This worksheet will help you gather the information necessary to complete the FAFSA.

## Your information

Legal first name: \_\_\_\_\_

Legal last name: \_\_\_\_\_ Middle initial: \_\_\_\_\_

Social Security Number (SSN)\*: \_\_\_\_\_ Driver's license number (if you have one): \_\_\_\_\_

Personal email (non-school): \_\_\_\_\_

Schools you want to send your financial aid information to (list up to 10 schools):

- |         |          |
|---------|----------|
| 1 _____ | 2 _____  |
| 3 _____ | 4 _____  |
| 5 _____ | 6 _____  |
| 7 _____ | 8 _____  |
| 9 _____ | 10 _____ |

## Will you need to provide parental information?

If you check **any** of the following boxes, you **will not** have to provide parental information.

If you check **none** of the following boxes, you **will** be asked to provide parental information.

- |  |  |
|--|--|
| <input type="checkbox"/> I was born before January 1, 1999   | <input type="checkbox"/> I have dependents (other than children or my spouse) who live with me and I provide more than half of their support |
| <input type="checkbox"/> I am serving on active duty in the U.S. Armed Forces  | <input type="checkbox"/> I will be working on a master's or doctorate program (e.g., MA, MBA, MD, JD, PhD, EdD, graduate certificate)        |
| <input type="checkbox"/> I am a veteran of the U.S. Armed Forces   | <input type="checkbox"/> Since I turned age 13, both of my parents were deceased   |
| <input type="checkbox"/> I was in foster care at any point since turning age 13  | <input type="checkbox"/> I was a dependent or ward of the court at any point since turning age 13  |
| <input type="checkbox"/> I am currently or I was an emancipated minor  | <input type="checkbox"/> I am currently or I was in legal guardianship   |
| <input type="checkbox"/> I am married  | <input type="checkbox"/> I am homeless or am at risk of being homeless   |
| <input type="checkbox"/> I now have or will have children for whom I will provide more than half of their support between July 1, 2022 and June 30, 2023 |  |

\*Students without SSNs who need to submit the FAFSA may download and print it at <https://studentaid.gov/h/apply-for-aid/fafsa>.  
The mailing address is on the form.

## Parent information

### Providing Parent 1 information?

*You will need:*

Parent 1 (father/mother/stepparent) SSN\*: \_\_\_\_-\_\_\_\_-\_\_\_\_

Parent 1 (father/mother/stepparent) legal last name, first initial: \_\_\_\_\_

Parent 1 (father/mother/stepparent) date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Did your parent file a federal income tax return? ☐ Yes ☐ No

If they filed a return, what was their filing status? ☐ Single ☐ Married-filing jointly

☐ Married-filing separately ☐ Head of household ☐ Qualifying widow(er) with dependent child

### Providing Parent 2 information?

*You will need:*

Parent 2 (father/mother/stepparent) SSN\*: \_\_\_\_-\_\_\_\_-\_\_\_\_

Parent 2 (father/mother/stepparent) legal last name, first initial: \_\_\_\_\_

Parent 2 (father/mother/stepparent) date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Did your parent file a federal income tax return? ☐ Yes ☐ No

If they filed a return, what was their filing status? ☐ Single ☐ Married-filing jointly

☐ Married-filing separately ☐ Head of household ☐ Qualifying widow(er) with dependent child

### Other information

Month and year my parents were married, separated, divorced or widowed (circle one): \_\_\_\_\_

How many people are in your parents' household? \_\_\_\_\_

Of these people, how many will be college students between July 1, 2022 and June 30, 2023? \_\_\_\_\_

**At any time during 2020 or 2021, did you, your parents, or anyone in your parents' household receive benefits from any of the federal programs listed?**

☐ Medicaid or Supplemental Security Income (SSI)

☐ Free or Reduced Price School Lunch

☐ Supplemental Nutrition Assistance Program (SNAP)

☐ Temporary Assistance for Needy Families (TANF)

☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

**Did your parents file or will they file a 2020 income tax return?**

☐ My parents have already completed a tax return

☐ My parents will file, but have not yet completed a tax return

☐ My parents are not going to file an income tax return

**What was your parents' adjusted gross income for 2020? \$\_\_\_\_\_**

*Skip this question if your parents did not file taxes.*

**Not sure whom to report as a parent?**

Visit <https://studentaid.gov/apply-for-aid/fafsa/filling-out/parent-info> OR call 800-433-3243.

**Not sure if you are a dependent student?**

Go to <https://studentaid.gov/apply-for-aid/fafsa/filling-out/dependency>.

**Did you know?**

If your parents filed a tax return with the IRS, they may be eligible to use the IRS Data Retrieval Tool, which is the easiest way to provide accurate tax information. With just a few simple steps, they may be able to view their tax return information and securely transfer it into FAFSA on the Web. For more information, visit <https://studentaid.gov/help-center/answers/article/what-is-irs-drt>.

The following questions ask about earnings (wages, salaries, tips, etc.) in 2020.

Answer the question whether or not a tax return was filed.

How much did Parent 1 (father/mother/stepparent) earn from working in 2020?

\$ \_\_\_\_\_

How much did Parent 2 (father/mother/stepparent) earn from working in 2020 (if applicable)?

\$ \_\_\_\_\_

Did your parents have any of the following items in 2020?

Check all that apply. Once online, you may be asked to report amounts paid or received by your parents.

**Additional financial information\***

- ☐ American Opportunity Tax Credit and/or Lifetime Learning Tax Credit
- ☐ Child support paid
- ☐ Taxable earnings from work-study, assistantships or fellowships
- ☐ Taxable college grant and scholarship aid reported to the IRS as income
- ☐ Combat pay or special combat pay
- ☐ Cooperative education program earnings

**Untaxed income\***

- ☐ Payments to tax-deferred pension and retirement savings plans
- ☐ Child support received
- ☐ IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans Form 1040 Schedule 1
- ☐ Tax exempt interest income
- ☐ Untaxed portions of IRA distributions and pensions (exclude rollovers)
- ☐ Housing, food and other living allowances paid to members of the military, clergy and others
- ☐ Veterans noneducation benefits
- ☐ Other untaxed income not reported, such as workers' compensation or disability benefits

**As of today**

What is your parents' total current balance of cash, savings and checking accounts? \$ \_\_\_\_\_

*Don't include student financial aid.*

What is the net worth of your parents' investments, including real estate? \$ \_\_\_\_\_

*Don't include the home in which your parents live.*

What is the net worth of your parents' businesses and/or investment farms? \$ \_\_\_\_\_

*Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.*

**Did you know?**

You should file your FAFSA as soon as possible on or after October 1 regardless of whether or not you have been accepted to college.

**Need help completing the FAFSA?**

- Contact Federal Student Aid by phone, email or live chat (<https://studentaid.gov/help-center/contact>).
- Contact your colleges' financial aid offices.
- Check with your high school to see if there is a local FAFSA completion event you can attend.
- Contact your local The College Place Director for assistance at [www.ecmc.org/TCP](http://www.ecmc.org/TCP).

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\*If the answer to any of these questions is yes, you will need to provide the total amount for 2020. For example, if your parent received \$380 in child support each month, you will list \$4,560 for 2020.

## Student information

Did you file or will you file a 2020 income tax return?

- ☐ I have already completed a tax return
- ☐ I will file, but have not yet completed a tax return
- ☐ I'm not going to file an income tax return

What was your (the student's) adjusted gross income for 2020? \$ \_\_\_\_\_

*Skip this question if you did not file taxes.*

The following questions ask about earnings (wages, salaries, tips, etc.) in 2020.

*Answer the question whether or not a tax return was filed.*

How much did you earn from working in 2020? \$ \_\_\_\_\_

### As of today

What is your total current balance of cash, savings and checking accounts? \$ \_\_\_\_\_

*Don't include student financial aid.*

What is the net worth of your investments, including real estate? \$ \_\_\_\_\_

*Don't include the home in which you live.*

What is the net worth of your businesses and/or investment farms? \$ \_\_\_\_\_

*Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.*

### Student citizenship status

*Check one of the following.*

- ☐ U.S. citizen (U.S. national)
- ☐ Neither citizen nor eligible noncitizen\*
- ☐ Eligible noncitizen (Enter your Alien Registration Number below)

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Ready to complete the FAFSA? Go to <https://studentaid.gov/h/apply-for-aid/fafsa>.

## Did you know?

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## Create your FSA ID

Completing your FAFSA online is the fastest and easiest way to file your FAFSA. In order to do so, you and your parent will each need an FSA ID. For more information and to create an FSA ID, go to <https://studentaid.gov/fsa-id/create-account/launch>.

My FSA ID username:

My FSA ID password:

My parent's FSA ID username:

My parent's FSA ID password:

\*California students, do not submit the FAFSA; instead submit the California Dream Act Application (CADAA) at <https://dream.csac.ca.gov/>

\*Colorado students, do not submit the FAFSA; instead submit the Colorado College Opportunity Fund at [www.collegeincolorado.org/Home/COF/College\\_Opportunity\\_Fund.aspx](http://www.collegeincolorado.org/Home/COF/College_Opportunity_Fund.aspx)

\*Connecticut students, do not submit the FAFSA; CSCU students go to [www.ct.edu/admission/finaid#undocumented](http://www.ct.edu/admission/finaid#undocumented); UConn students go to [https://financialaid.uconn.edu/undocumented\\_students](https://financialaid.uconn.edu/undocumented_students)

\*Minnesota students, do not submit the FAFSA; instead submit the Minnesota Dream Act Application at [www.ohe.state.mn.us/mPg.cfm?pageID=2056](http://www.ohe.state.mn.us/mPg.cfm?pageID=2056)

\*Oregon students, do not submit the FAFSA; instead submit the Oregon Student Aid Application (ORSAA) at <https://oregonstudentaid.gov>

\*Students in all other states, check with your high school counselor or financial aid office to see whether completing the FAFSA form is the way to apply for state and college student aid