



FINANCIAL AID

2027-28

Sue Bialk

Financial Aid & Educational Funding

TOPICS WE WILL DISCUSS

- What is financial aid, cost of attendance (COA), student aid index (SAI), and financial need?
- Categories, types, and sources of financial aid
- Free Application for Federal Student Aid (FAFSA®)
- Special and unusual circumstances
- FAFSA Demonstration

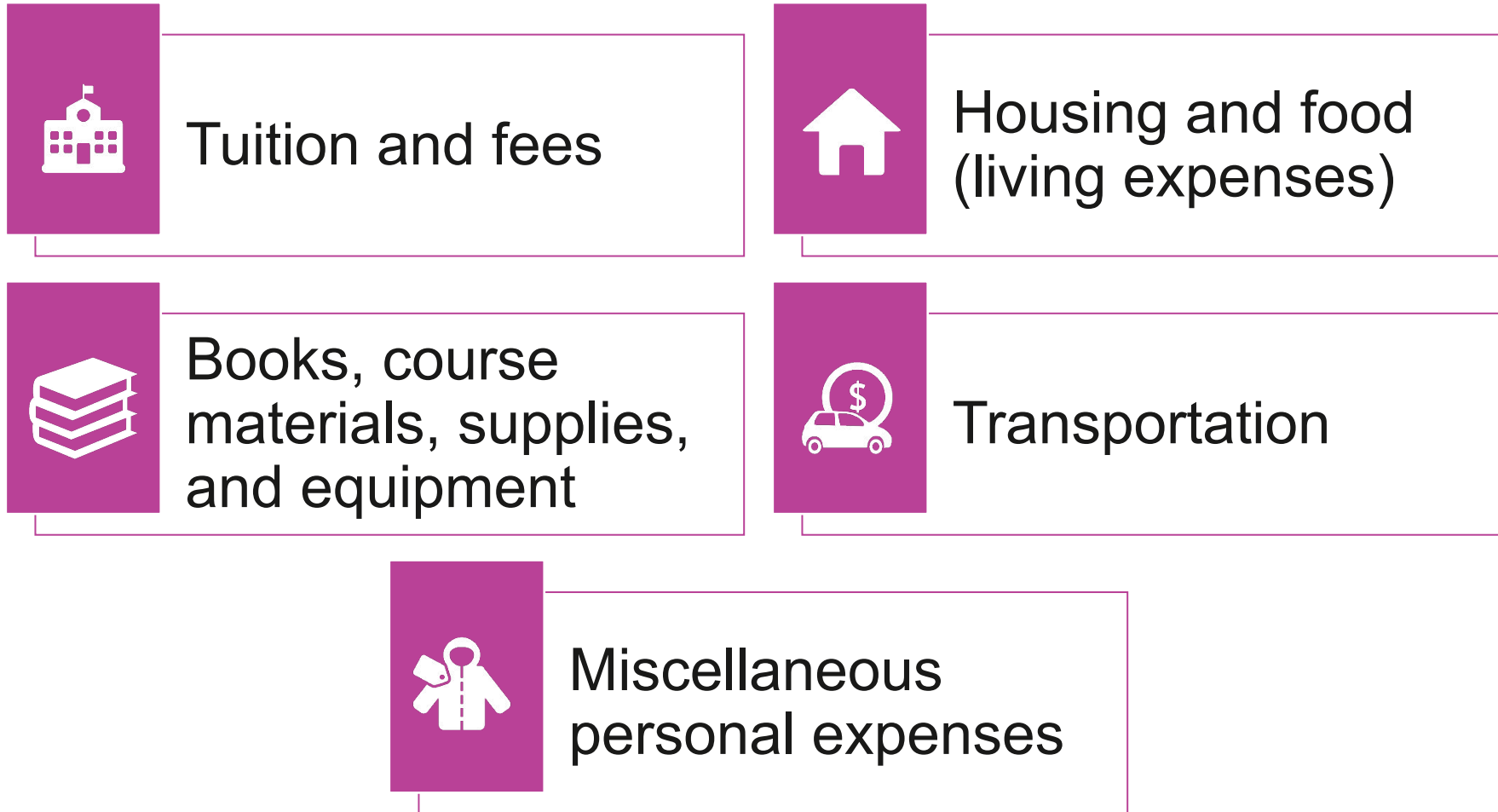
**Unless otherwise noted, screenshots are taken from the U.S. Department of Education's 2027-28 FAFSA® Prototype*

WHAT IS FINANCIAL AID?

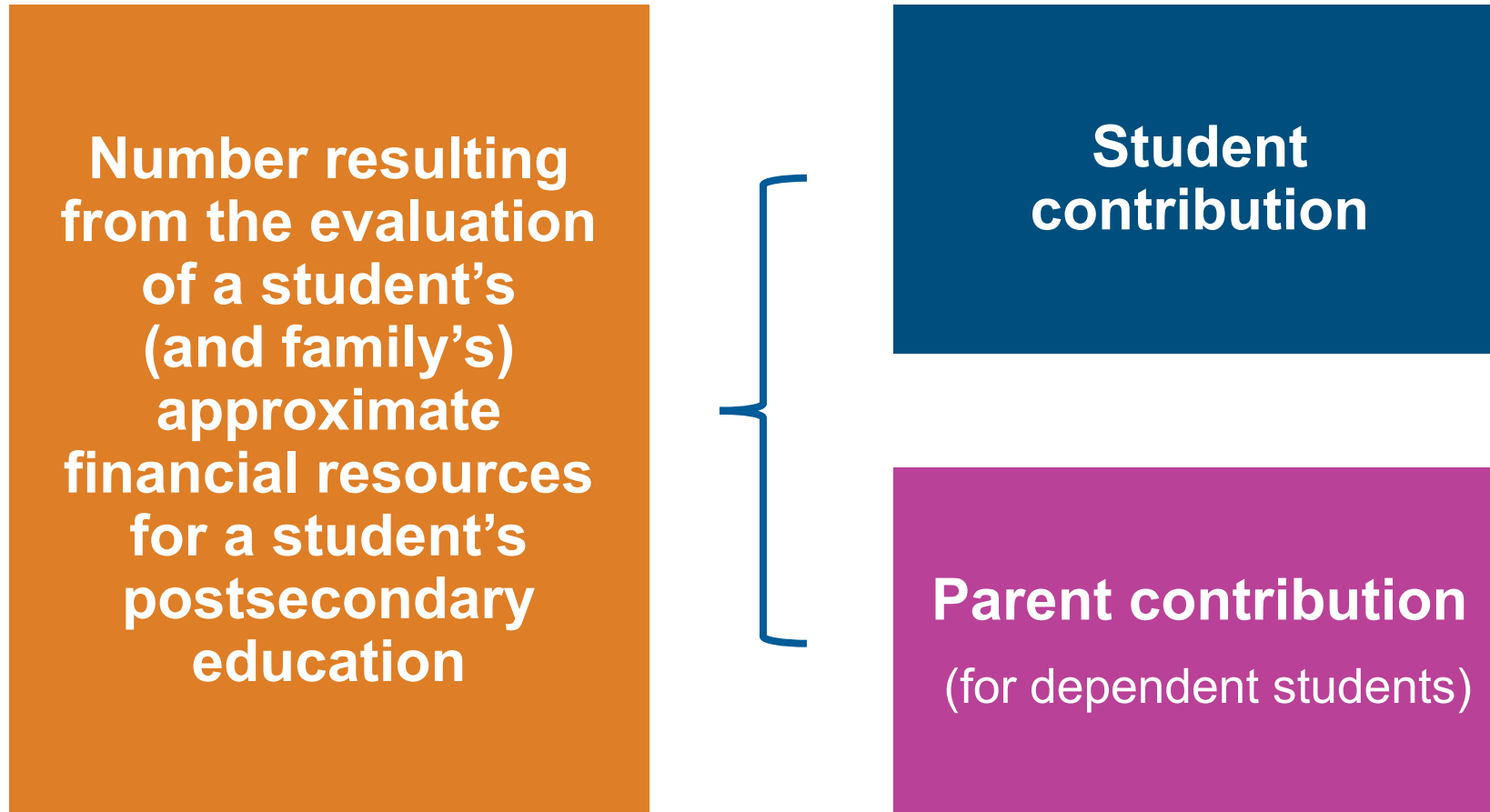
Financial aid consists of funds provided to students and families to help pay for postsecondary educational expenses



WHAT IS COST OF ATTENDANCE (COA)?



What Is Student Aid Index (SAI)?



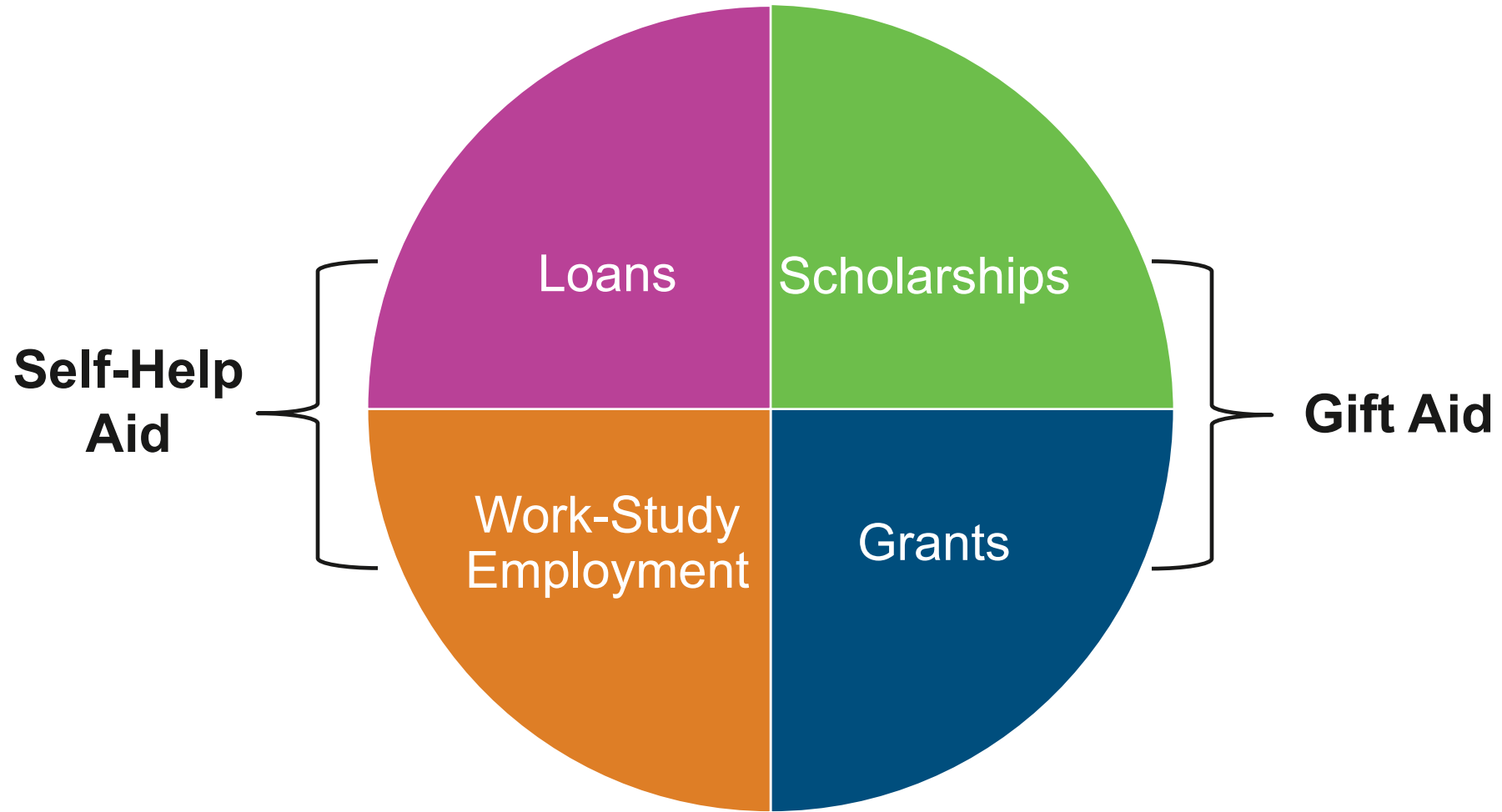
What Is Financial Need?

$$\begin{array}{rcl} & \text{Cost of attendance (COA)} & \\ - & \text{Student aid index (SAI)} & \\ \hline = & \text{Financial need} & \end{array}$$

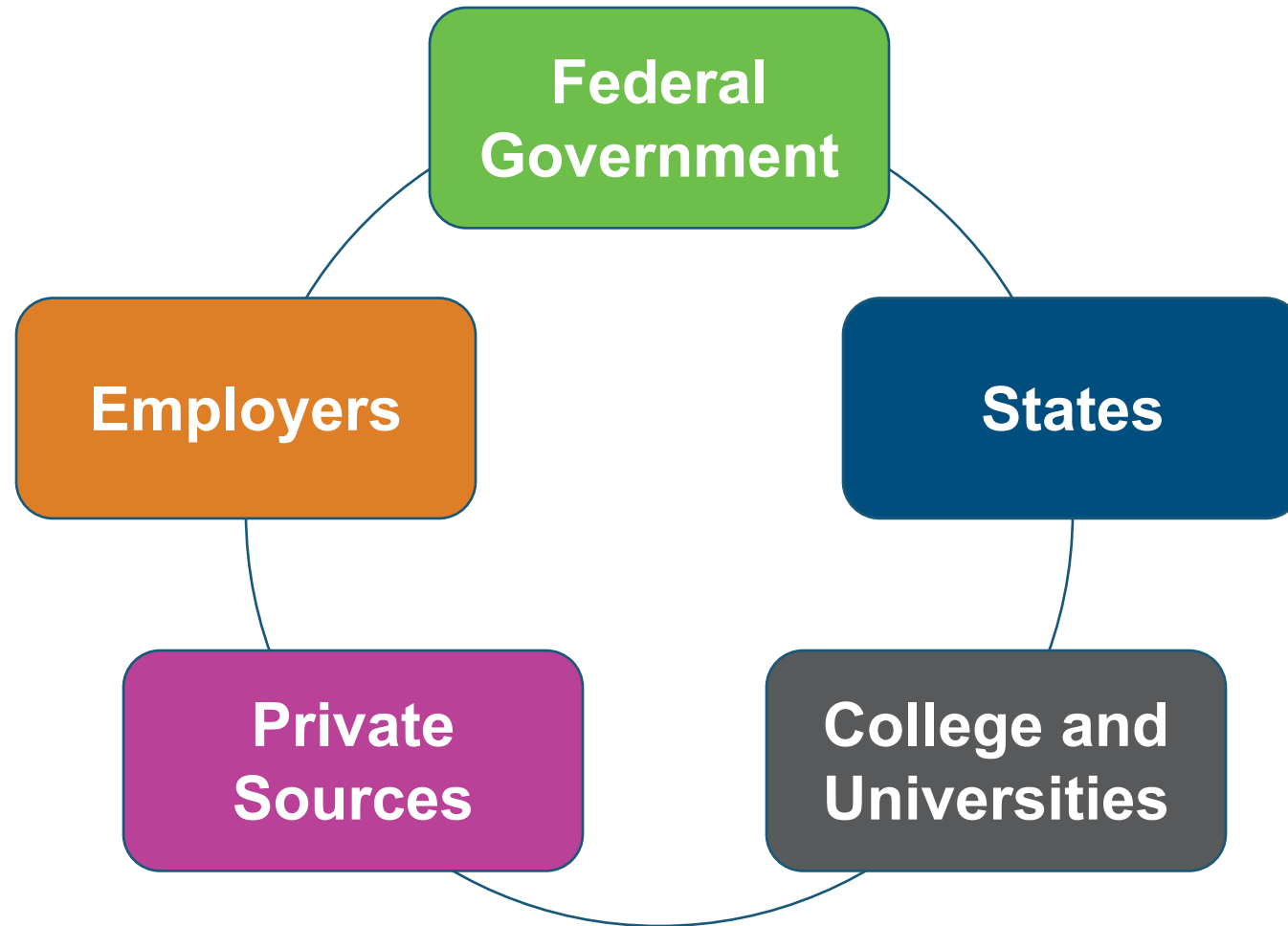
CATEGORIES OF FINANCIAL AID



TYPES OF FINANCIAL AID



SOURCES OF FINANCIAL AID



FEDERAL GOVERNMENT

Largest source of financial aid

Aid provided primarily based on financial need

FAFSA is required each year

Eligibility requirements must be met

FEDERAL STUDENT AID PROGRAMS

Federal Pell Grant

Federal Supplemental
Educational
Opportunity Grant
(FSEOG)

Teacher Education
Assistance for College
and Higher Education
(TEACH) Grant

Federal Work-Study
(FWS)

Federal Direct Student
Loans (Direct Loans)

Federal Direct PLUS
Loans

FEDERAL PELL

- Pell Grant for eligible workforce programs
- Limitations on Pell Grant eligibility
 - Student is not eligible for the Pell Grant if:
 - SAI exceeds twice the maximum Pell Grant amount; or
 - Student's nonfederal grants and scholarships cover entire COA (even if otherwise eligible)

STATES

Residency requirements usually apply

Aid may be merit or need based

Eligibility determined using the FAFSA and/or state aid applications

Deadlines vary by state

COLLEGES AND UNIVERSITIES

Aid provided based on both merit and financial need

Aid may be gift aid or self-help aid

Eligibility determined using the FAFSA and/or institutional applications

Deadlines and application requirements vary by institution

PRIVATE SOURCES

Foundations, businesses, churches, civic,
and charitable organizations

Deadlines and applications procedures vary

Begin researching private sources early

EMPLOYERS

Scholarships opportunities for children of employees

Educational benefits

FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA®)

- Collects demographic and financial information
- Information used to calculate the student aid index (SAI)
- Colleges use SAI to offer financial aid
- Available in English and Spanish
 - Assistance available in additional languages

FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA)

- May be filed at any time during an academic year, beginning on or around the October 1st prior to the academic year for which the student requests aid
- **For the 2027-28 academic year, the FAFSA will be available by October 1, 2026**
- Colleges may set FAFSA priority dates

FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA)



Online FAFSA



PDF FAFSA

BENEFITS OF USING ONLINE FAFSA

- Simplified application process
- Built-in edits to prevent costly errors
- Skip-logic allows student and/or parent to skip unnecessary questions
- No need to manually enter federal tax information (FTI)
- Real-time processing and immediate corrections
- Pre-filled information to reduce repetitive data entry
- More detailed instructions and “help” for common questions
- Ability to check application status online

STUDENTAID.GOV ACCOUNT USERNAME AND PASSWORD (FSA ID)

- Used for FAFSA completion and access to certain U.S. Department of Education websites
- Student and parent must create own FSA ID
- May be used throughout financial aid process, including subsequent school years
- Only the owner should create an FSA ID

Create an Account

Whether you're a student, parent, or borrower, you'll need to create your own account to fill out the *Free Application for Federal Student Aid* (FAFSA®) form and manage your federal student aid.

Language Preference ?

☒ English ☐ Español

Get Started

🕒 7 minutes

What You'll Need

- Your Social Security number (if you have one)
- Your own email address

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

Apply at <https://studentaid.gov/fsa-id/create-account/launch>

ONLINE FAFSA

FAFSA[®] Form 2027–28



Welcome, Raya, to the
2027–28 FAFSA[®] Form

I am starting the FAFSA form as a

☐ Student 

☐ Parent 

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

Previous

Continue

FUTURE ACT DIRECT DATA EXCHANGE (FA-DDX)

- Allows for an individual's federal tax information (FTI) to be directly transferred from the IRS to the FAFSA
- Consent is required by all contributors on FAFSA
- IRS transfers information to populate FAFSA income questions for most tax filers
- Eliminates manual entry of tax and income information

PDF FAFSA

- Can use the PDF FAFSA to review questions that will be asked on online FAFSA for student and parent(s), if applicable

FAFSA_27-28_Reg_en_2026-01-24 Do not submit 2027-28

FAFSA® Form July 1, 2027 – June 30, 2028
Free Application for Federal Student Aid
Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION
OMB No. 1845-0041

For help in filling out the FAFSA form, see the Student Aid website at studentaid.gov or call 1.800.4.EDU.AID / 1.800.433.3243.

FAFSA_27-28_Reg_en_2026-01-24 Do not submit 2027-28

Parent

► See "Who must provide information on the FAFSA form?", on page 3, to determine if a parent must complete this section. Questions 30–41 apply to the student's parent. Leave blank any questions that don't apply to the parent.

30 Parent Identity Information (See Notes page 21.)
The parent's full legal name, for example, as it appears on their Social Security card.

First name
Middle name
Last name
Suffix (e.g., Jr. or III)
Date of birth (MM/DD/YYYY)
Social Security number (SSN)
Individual Taxpayer Identification Number (ITIN)
If the parent does not have an ITIN, leave this field blank.

31 Parent Contact Information (See Notes page 21.)
Mobile phone number
Email address
Permanent mailing address
City
Postal (ZIP) code
Country
State

32 Parent Current Marital Status (See Notes page 21.)
☐ Single (never married) ☐ Unmarried and both legal parents living together ☐ Married (not separated) ☐ Remarried ☐ Separated ☐ Divorced ☐ Widowed

33 Parent State of Residence (See Notes page 21.)
State, country, or military location
Date the parent became a resident (MM/YYYY)
If the parent was born in their state of residence and hasn't moved out of state since, enter the parent's date of birth. Otherwise, enter the date the parent moved to their state of residence.

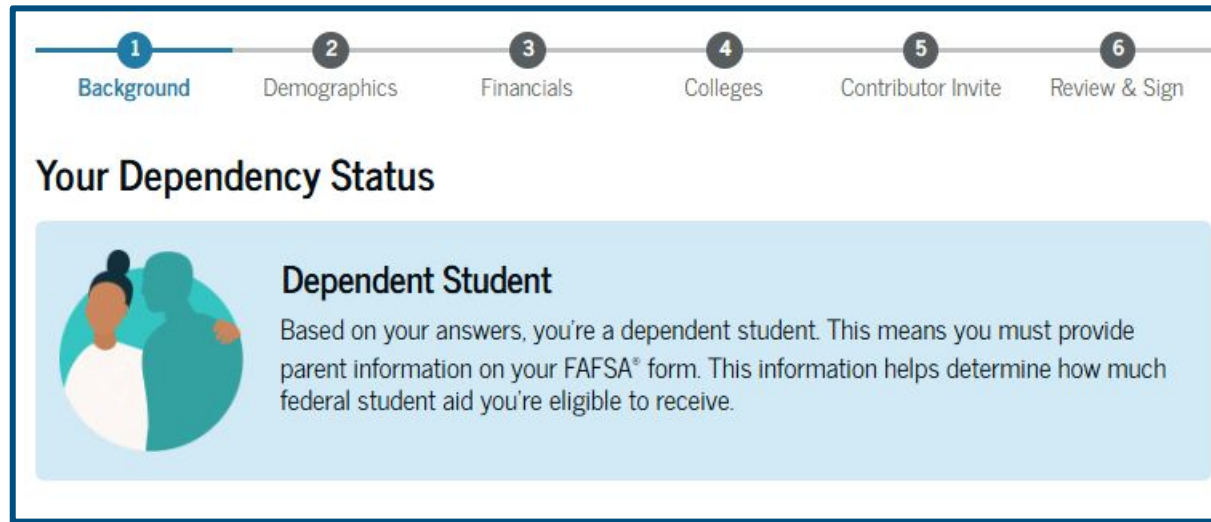
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Source: U.S. Department of Education, 2027-28 FAFSA Draft

STUDENT INFORMATION

- Identity and contact information
- Consent and approval for FTI transfer from IRS
- Marital status
- School year
- Personal and unusual circumstances

STUDENT DEPENDENCY STATUS



The screenshot shows a progress bar at the top with six steps: 1 Background, 2 Demographics, 3 Financials, 4 Colleges, 5 Contributor Invite, and 6 Review & Sign. Below the progress bar, the title "Your Dependency Status" is displayed. Underneath, there is a light blue box containing an illustration of a person and a parent figure. To the right of the illustration, the text reads: "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."

- Born before January 1, 2004?
- Married?
- Graduate or professional student?
- Active-duty military?
- Veteran?
- Children or legal dependents?
- Orphan, ward of the court, foster care?
- Emancipated minor or legal guardianship?
- Homeless or self-supporting and at risk of homelessness?

UNUSUAL CIRCUMSTANCES

- Conditions that justify an institution making an adjustment to a student's dependency status
 - Cannot contact parent or contact poses risk to student
- Student does not provide parental data on FAFSA
 - Considered provisionally independent
- Student follows institution's process for dependency override determination

STUDENT INFORMATION

- Demographic information
- Citizenship status
- Parents' education status
- Parent killed in line of duty
- High school completion information

STUDENT SECTION COMPLETION

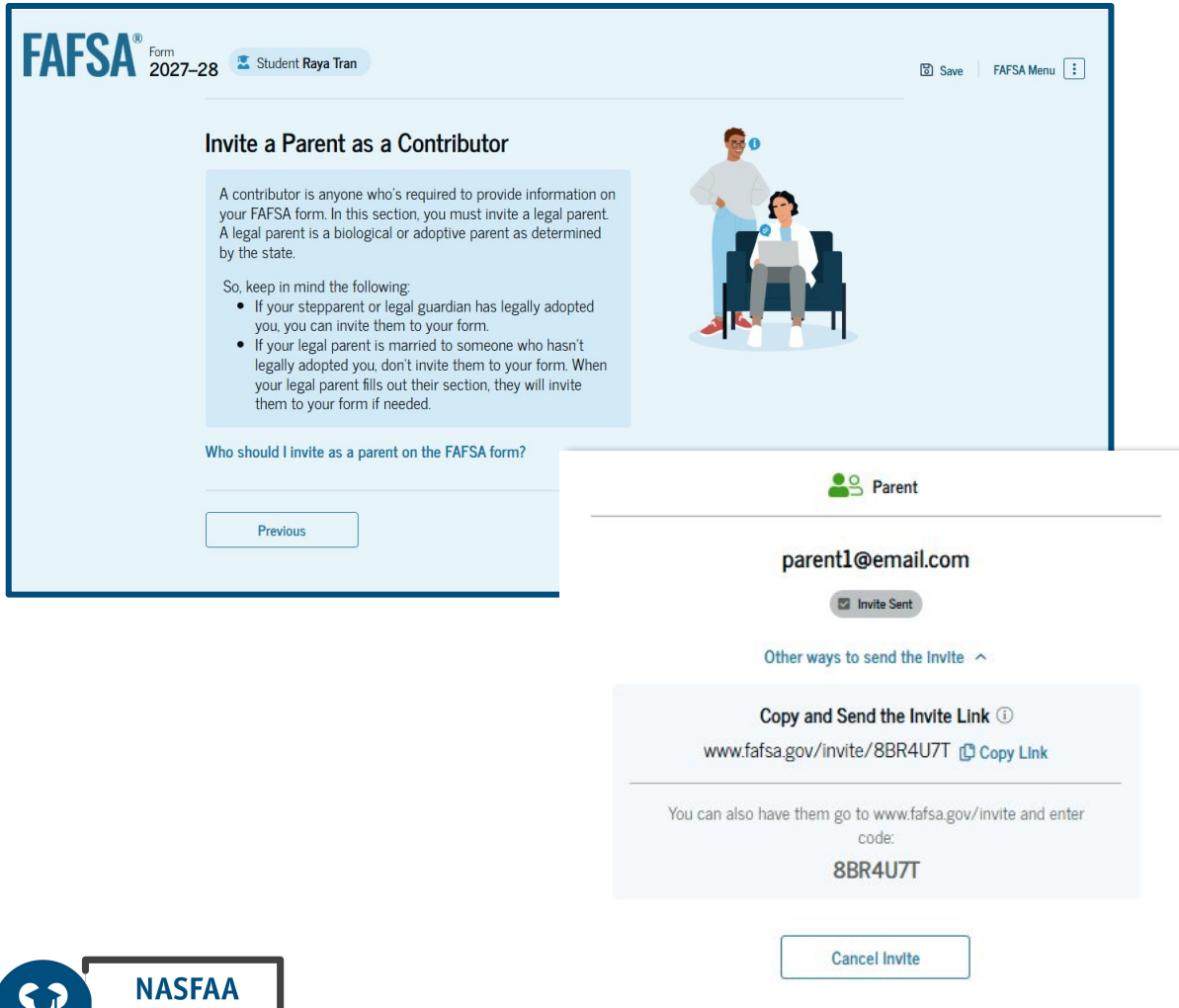
- College selection
- Contributor invitation
- Review of information and signature

The screenshot shows the FAFSA 2027-28 Student Section completion page. At the top, the FAFSA logo and 'Form 2027-28' are displayed, along with the student's name 'Student Raya Tran'. A progress bar indicates the 'Student Section' is complete (marked with a checkmark) and the 'Parent Section' is next (marked with a '2'). The main heading is 'Pending Submission' with a sub-heading 'Check with your contributor'. Below this, it says 'Parent Contributor' with a green person icon. A box titled 'Requirements for Dependent Students' explains that the form cannot be submitted until the contributor(s) fill out their section and sign it. A table lists the contributor information:

Contributor	Role	Invite Code	Status
parent1@email.com	Parent	88R4U7T	Invite Sent

Below the table is a 'Manage Invitations' button. At the bottom, a dark blue footer contains the text 'Track and Manage Your FAFSA® Form and Contributors' and a 'View Status' button. A note states: '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).'

STUDENT INVITES PARENT TO FAFSA



The image shows a screenshot of the FAFSA website interface. The top header includes the FAFSA logo, the text 'Form 2027-28', and the student's name 'Student Raya Tran'. There are 'Save' and 'FAFSA Menu' buttons in the top right. The main heading is 'Invite a Parent as a Contributor'. Below this, a text box explains that a contributor is someone required to provide information on the FAFSA form, and a legal parent is a biological or adoptive parent as determined by the state. It then lists two points to keep in mind: if a stepparent or legal guardian has legally adopted you, you can invite them; and if your legal parent is married to someone who hasn't legally adopted you, don't invite them. To the right of this text is an illustration of a parent and a student. Below the text is a question 'Who should I invite as a parent on the FAFSA form?' and a 'Previous' button. Overlaid on the bottom right is a modal window titled 'Parent' with a green icon. It shows the email 'parent1@email.com' and an 'Invite Sent' button. Below that, it says 'Other ways to send the Invite' with a dropdown arrow. A section titled 'Copy and Send the Invite Link' shows the URL 'www.fafsa.gov/invite/8BR4U7T' with a 'Copy Link' button. It also states 'You can also have them go to www.fafsa.gov/invite and enter code: 8BR4U7T'. At the bottom of the modal is a 'Cancel Invite' button.

FAFSA® Form 2027-28 Student Raya Tran Save FAFSA Menu

Invite a Parent as a Contributor

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

So, keep in mind the following:

- If your stepparent or legal guardian has legally adopted you, you can invite them to your form.
- If your legal parent is married to someone who hasn't legally adopted you, don't invite them to your form. When your legal parent fills out their section, they will invite them to your form if needed.

Who should I invite as a parent on the FAFSA form?

Previous

Parent

parent1@email.com

Invite Sent

Other ways to send the Invite ^

Copy and Send the Invite Link ⓘ

www.fafsa.gov/invite/8BR4U7T Copy Link

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

8BR4U7T

Cancel Invite

- Student enters parent email address to invite them to complete parent portion of the FAFSA
- Invitation link or invitation code can be shared directly

PARENT(S) OF RECORD

Parents who live together

- income and assets of both parents.

Divorced or separated parents

- only the income and assets of the parent who provides the greater portion of the student's financial support.

Death of a parent

- (A) If either of the parents has died, the surviving parent shall be considered a single parent, until that parent has remarried.
- (B) If both parents have died, the student shall not report any parental income or assets.

Remarried parents

- the income of that parent's spouse shall be included in determining the parent's assessment of adjusted available income if the student's parent and the stepparent are married as of the date of application for the aid year concerned.

Single parent who is not divorced or separated

- income and assets of the parent.

PARENT OF RECORD (CONT.)

For dependent students with **divorced** or **separated** parents:

1. Income and assets are reported for parent who provides **most financial support over 12 months prior to filing FAFSA** even if student does not live with that parent or lives with the other parent.
2. If neither parent provided support in 12-month period in #1, parent of record is parent who provided greater support during most recent year student received financial support from a parent; and then
3. If equal support is given; parent of record is one with the higher income or assets.

PARENT INVITATION

- Accept email invitation or use invitation link or invitation code to complete parent portion of student's FAFSA
- Parents must use FSA ID to access FAFSA

[← FAFSA Homepage](#)

Accept 2027–28 FAFSA® Invitation

Enter the code you received for the FAFSA form.

Invitation Code

[Accept Invite](#)

How long will this take?

8 min

Why We Need Your Information

Your part is needed to finish the student's FAFSA Form. It lets us determine if the student qualifies for federal grants, work-study jobs, and/or loans.

Don't have an invitation code?

Speak with the person who invited you to the form and ensure they have sent it to your email. Check your inbox for your invitation code.

PARENT INFORMATION

- Identity and contact information
- Consent and approval for FTI transfer from IRS
- Marital status
- State of residence

PARENT FINANCIAL INFORMATION

- Receipt of means-tested federal benefits in the previous two years
- Tax filing status
- Family size and number in college
- Tax return information
 - Minimal questions if FTI transferred from IRS
- Assets
- Parent spouse or partner information (if applicable)

WHO IS INCLUDED IN FAMILY SIZE?

Dependent Applicants

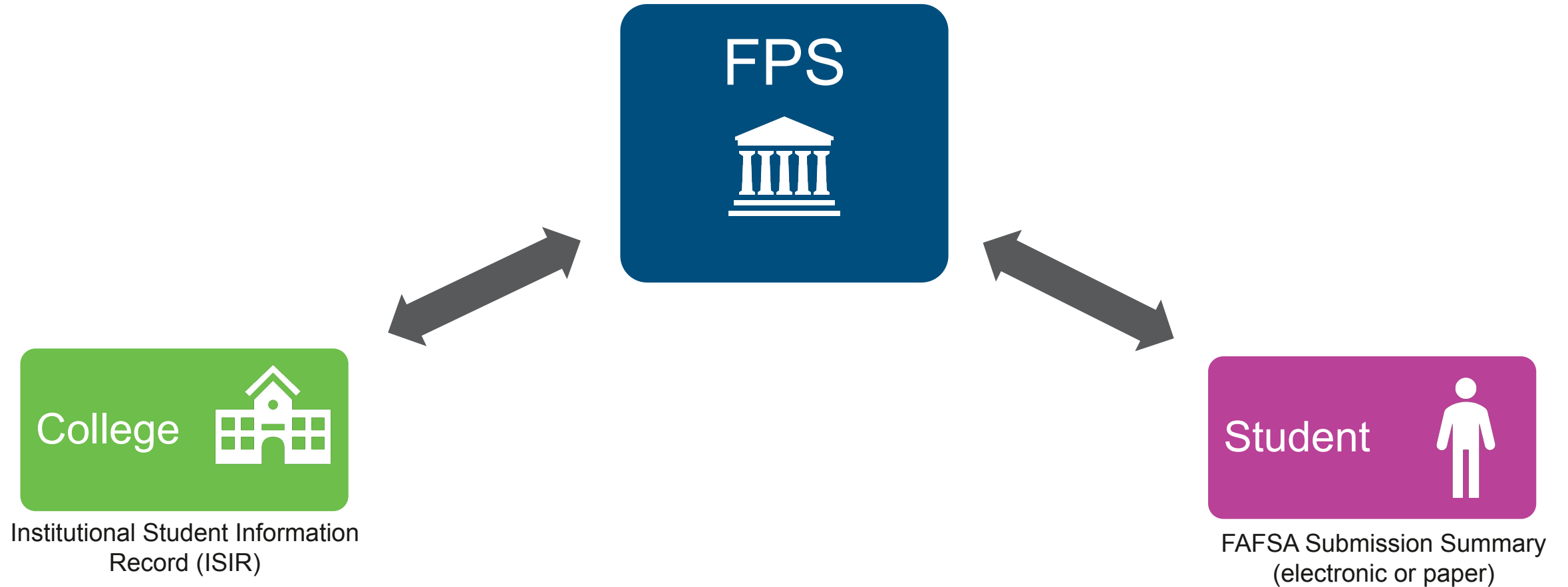
- Student
- Parent (and spouse)
- Parent's dependent children, even if they live apart from the parent temporarily, such as for college enrollment*
- Other people if they live with the parent*

Independent Applicants

- Student (and spouse)
- Student's dependent children, even if they live apart from the student temporarily, such as for college enrollment*
- Other people if they live with the student*

**Include only if providing more than half of their support between July 1, 2027 and June 30, 2028*

FAFSA PROCESSING RESULTS



FAFSA SUBMISSION SUMMARY

- Four sections:
 - Eligibility Overview
 - FAFSA Form Answers
 - School Information
 - Next Steps
- Ability to print summary

The screenshot shows the FAFSA Submission Summary page for student Raya Tran. The page is titled "FAFSA FORM 2027-28 FAFSA Submission Summary". It includes a navigation bar with links for "Eligibility Overview", "FAFSA Form Answers", "School Information", and "Next Steps". The "Eligibility Overview" section is currently selected. The page displays the student's name, application received date (Aug. 12, 2026), application processed date (Aug. 12, 2026), data release number (1234), and viewing status (Submission 1). The main content area is titled "Your Estimated Federal Student Aid" and lists three types of aid: Federal Pell Grant (up to \$4,556), Federal Direct Loans (up to \$4,556), and Federal Work-Study (You May Be Eligible). A disclaimer states that the amounts shown are only estimates based on full-time enrollment and the average cost of attendance. A "Keep in mind, this is only an estimate" section advises students to refer to their school's financial aid offer for a final determination. The bottom section displays the Student Aid Index (SAI) as -355, explaining that it is an index number used by schools to determine aid eligibility. On the right side, there are two call-to-action boxes: "View All of Your Federal Student Aid in One Place" with a "Visit My Aid" button, and "Find the Right College or Career School" with a "Visit College Scorecard" button. An illustration of a student looking at a phone is also present.

Back Print This Page

FAFSA FORM 2027-28 FAFSA Submission Summary

Student Raya Tran Application Received Aug. 12, 2026 Application Processed Aug. 12, 2026 Data Release Number 1234 Viewing: Submission 1

Eligibility Overview FAFSA Form Answers School Information Next Steps

Your Estimated Federal Student Aid

Federal Pell Grant Up to **\$4,556**
A Federal Pell Grant is awarded to undergraduate students who have financial need and who have not earned a degree or are in a teacher certification program. Federal Pell Grants don't need to be repaid.

Federal Direct Loans Up to **\$4,556**
A federal direct loan is money lent to you by the government that you must repay with interest.

Federal Work-Study You May Be Eligible
Federal Work-Study is a way for students to earn money to pay for school through part-time jobs on or off campus.

Amounts shown here are only estimates of federal student aid based on full-time enrollment and the average cost of attendance. Your school will determine how much student aid to offer you, which may include additional aid from your school or state.

Learn more about financial aid

Keep in mind, this is only an estimate
Always refer to your school's financial aid offer for a final determination of financial aid available.

Your Student Aid Index (SAI) -355
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?

View All of Your Federal Student Aid in One Place
View detailed information about your federal student loan and grant aid, including your enrollment history, payment history, and subsidized usage.

Visit My Aid

Find the Right College or Career School
Use College Scorecard to compare schools by size, location, graduation rate, and more.

Visit College Scorecard

MAKING CORRECTIONS

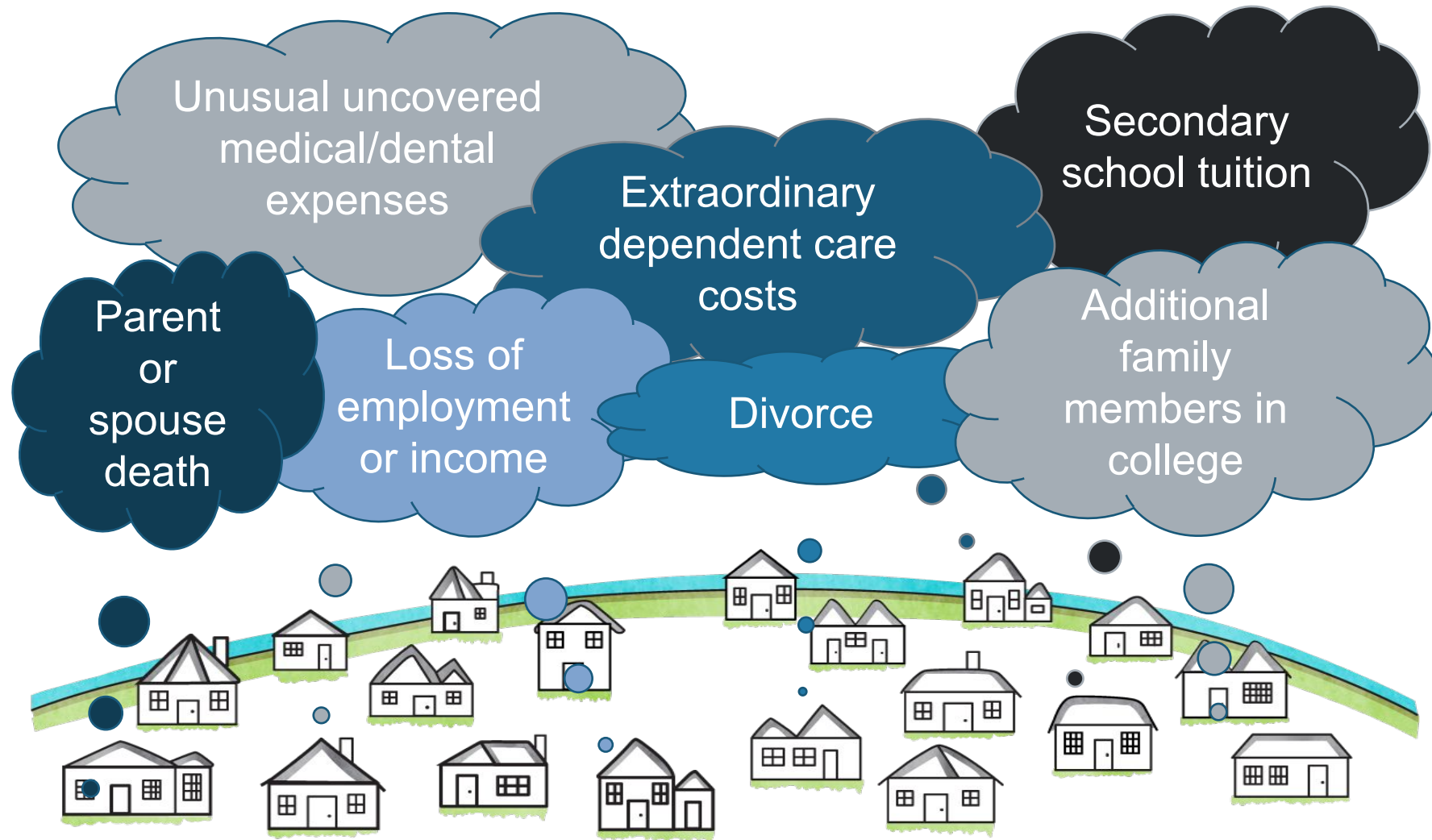
If necessary, corrections to FAFSA data may be made by:

- Using online FAFSA;
- Updating paper FAFSA Submission Summary; or
- Submitting documentation to college's financial aid office

SPECIAL CIRCUMSTANCES

- Different than unusual circumstances (dependency overrides)
- Unique conditions exist that cannot be documented with the FAFSA, or circumstances have changed since filing
- Student should contact institution's financial aid office for more information
- Decisions are final and cannot be appealed to U.S. Department of Education

Special Circumstances



2027–28 FAFSA® Preview Presentation

Published August 2026

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

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Dependent Student: Role

FAFSA[®] FORM
2027-28



Welcome, George,
to the 2027-28 FAFSA[®] Form



I am starting the FAFSA form as a

☒ Student 

☐ Parent 

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

Previous

Continue

OMB No. 1845-0001 • Form Approved • App. Exp. 8/31/2026

Dependent Student: Identity Information

FAFSA[®] FORM 2027-28

Student George Gutierrez

Save | FAFSA Menu

Student Identity Information

Review the information below and verify that it's correct before moving forward.

[Learn about how we use the information we collect on your FAFSA[®] form.](#)

Name

George T Gutierrez

Date of Birth

02/15/2006

Social Security Number

***-**-8270

Email Address

559888270test@testcod.edu

Mobile Phone Number

(555) 557-6231

To update this information for all U.S. Department of Education communications, go to [Account Settings](#).

Permanent Mailing Address

Include apartment number.

80000 Lane

City

San Antonio

State

TX

Zip Code

00000

Country

US

Continue

Hi! Need help?

45

Student State of Residence

State, Country, or Military Location

If the student is an out-of-state student, choose the state they live in when not in school.

If the student lives outside the U.S. and Canada, choose "Foreign Country (FC)."

If the student moved to a foreign country because they or a family member serves in the U.S. armed forces, type "Military." Then, pick the correct option from the list that displays.

Texas (TX)

i

Date the Student Became a Resident of Texas (TX)

If the student has always lived in Texas (TX), enter their birth month and year. If not, enter the month and year they moved to Texas (TX). Enter an approximate date if you don't know the exact date.

Month: 01

Year: 2025

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Dependent Student: Provide Consent and Approval (1 of 3 slides)

FAFSA[®] FORM
2027–28

Student George Gutierrez

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 2025 tax return information for the 2027–28 FAFSA form.

→ Federal tax information is used to determine your eligibility for federal student aid.

→ Tax return information is required to complete the FAFSA form.

By accepting below, I consent to the disclosure of information about me, and affirmatively approve of:

- the receipt and use of my federal tax information, and
- the redisclosure of my federal tax information by the U.S. Department of Education (ED), as described herein.

By accepting below, I consent to and affirmatively approve of, as applicable, the following:

1. ED may disclose my 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 my approval for the use of my federal tax information

to determine eligibility for ED financial aid that is provided to the U.S. Department of the

 Hi! Need help?

Dependent Student: Provide Consent and Approval (2 of 3 slides)

3. ED may redisclose my federal tax information received from the IRS pursuant to 26 U.S.C. § 6103(D)(13)(D)(iii) to the following entities solely for the use in the application, award, and administration of financial aid:
- Institutions of higher education participating in the federal student aid programs authorized under subpart 1 of part A, part C, or part D of *Title IV of the Higher Education Act of 1965*, as amended
 - State higher education agencies
 - Scholarship organizations designated prior to Dec. 19, 2019, by the secretary of education
 - Contractors of institutions of higher education and state higher education agencies to administer aspects of the institution's or state agency's activities for the application, award, and administration of such financial aid
4. ED may redisclose my federal tax information to another FAFSA applicant's FAFSA form(s) for which I elect to participate. By accepting an invitation and affirmation to participate in another individual's FAFSA form, my federal tax information will be redisclosed to the additional application. I understand that I may decline an invitation to participate, which will prevent the transfer of my federal tax information to that FAFSA form.

By consenting and providing my affirmative approval, I further understand the following:

1. My consent and affirmative approval are required, as a condition of my eligibility or the eligibility of a FAFSA applicant who has requested that I share my federal tax information on their FAFSA form, for 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, even if I did not file a U.S. federal tax return.
2. I am providing my written consent for the redisclosure of my federal tax information by ED to include, but not limited to, institutions of higher education, state higher education agencies, designated scholarship organizations, their respective contractors and auditors, other family members participating in the FAFSA form, Office of Inspector General, under 26 U.S.C. § 6103(l)(13)(D), and with my further express written consent obtained by an institution of higher education, the redisclosure of FAFSA information pursuant to the terms and conditions of 20 U.S.C. § 1098h(c).
3. Any federal tax information received from the IRS at a later date shall supersede any manually entered financial or income information on the FAFSA form.
4. ED may request updated federal tax information from the IRS once my consent and approval are provided. If federal tax information has changed (e.g., amended tax return filed with revised information), then eligibility for and amounts of federal, state, and institutional financial aid may change.
5. If I do not consent to the redisclosure of my federal tax information to institutions of higher education, state higher education agencies, designated scholarship organizations, and their respective contractors, ED will be unable to calculate my eligibility for federal student aid or the eligibility of a FAFSA applicant who has requested that I share my federal tax information on their FAFSA form.

By accepting below, I consent electronically to the use of my StudentAid.gov account username and password (FSA ID) as my signature and certify under penalty of perjury under the laws of the United States of America, that the foregoing is true and correct. I understand that any falsification of this statement is punishable under the provisions of 18 U.S.C. § 1001 by a fine, imprisonment of not more than five years, or both, and that the knowing and willful request for or acquisition of records

Dependent Student: Provide Consent and Approval (3 of 3 slides)

financial aid may change.

5. If I do not consent to the redisclosure of my federal tax information to institutions of higher education, state higher education agencies, designated scholarship organizations, and their respective contractors, ED will be unable to calculate my eligibility for federal student aid or the eligibility of a FAFSA applicant who has requested that I share my federal tax information on their FAFSA form.

By accepting below, I consent electronically to the use of my StudentAid.gov account username and password (TSA ID) as my signature and certify under penalty of perjury under the laws of the United States of America, that the foregoing is true and correct. I understand that any falsification of this statement is punishable under the provisions of 18 U.S.C. § 1001 by a fine, imprisonment of not more than five years, or both, and that the knowing and willful request for or acquisition of records pertaining to an individual under false pretenses is a criminal offense under the *Privacy Act of 1974*, subject to a fine of not more than \$5,000 fine (5 U.S.C. § 552(a)(3)). By accepting and submitting my part of the FAFSA form, my execution (including date and time) of consent and approval will be logged in ED's Person Authentication Service System of Record (18-11-12).

Frequently Asked Questions

Who should provide consent and approval?	✓
If I'm married and didn't file a joint tax return with my current spouse, does my spouse have to provide consent and approval for you to access their tax information?	✓
What happens after I provide consent and approval?	✓
What happens if I decline consent and approval?	✓

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

Dependent Student: Imports IRS Information (1 of 3 slides)

FAFSA[®]

FORM

2027–28

Student George Gutierrez

Save

FAFSA Menu



We're securely importing your information.

Do not leave this page while your information is being imported into your application.

Loading...

Dependent Student: Imports IRS Information (2 of 3 slides)

FAFSA[®] FORM 2027-28

Student George Gutierrez

Save

FAFSA Menu

We're securely importing your information.

Success! We've confirmed your information with the IRS.

Select "Continue" to proceed. You will still have to answer some questions in the Financials section.

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Continue

Dependent Student: Imports IRS Information (3 of 3 slides)

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We're securely importing your information.



Sorry, data could not be retrieved. Select "Continue" to proceed.

We were unable to retrieve your financial information from the IRS, so you'll need to enter it yourself in the Finances section.

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Introduction: Student Background

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Background

We'll ask you questions that help us determine your eligibility for federal student aid. This information can affect the types of federal student aid you're eligible to receive.

→ Sometimes we need to collect information from other people depending on answers in this section. We'll let you know if this is the case.

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Dependent Student: Marital Status

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Review & Sign

Student Current Marital Status ⓘ

☒ Single (never married)

☐ Married (not separated)

☐ Remarried

☐ Separated

☐ Divorced

☐ Widowed

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Hi! Need help?

Dependent Student: College or Career School Plans

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Student School Year

What year will the student be in college when they start their classes for the 2027–28 school year?

☒ First (freshman)

☐ Second (sophomore)

☐ Third or higher (junior and up)

☐ Graduate-level (such as a master's or doctorate)

Student Holds Bachelor's Degree

Will the student already have a bachelor's degree when they start their college classes for the 2027–28 school year?

☐ Yes

☒ No

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Hi! Need help?

Dependent Student: Personal Circumstances

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Student Personal Circumstances

Select all that apply or "None of these apply."

☐ 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.

☐ 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.

☐ 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.

☒ None of these apply.

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Hi! Need help?

Dependent Student: Homelessness Status

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Student Homelessness

At any point in 2026 or after, has the student faced one of these situations?

They didn't live with a parent or guardian, and they were homeless.

They didn't live with a parent or guardian, were supporting themselves, and were at risk of becoming homeless.

They didn't face either of these situations.

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Dependent Student: Unusual Circumstances

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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

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Hi! Need help?

Student Dependency Status: Dependent Student

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Review & Sign

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

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Hi! Need help?

Introduction: Dependent Student Demographics

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Student Demographics

We'll ask questions about your background and family.

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Dependent Student: Demographic Information

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Student Demographic Information

Questions Used for Research Purposes Only and Do Not Affect Federal Student Aid Eligibility

Your answers will not

- affect the student's eligibility for federal student aid,
- be used in any aid calculations, or
- be shared with the schools to which the student applies.

What is the student's sex?

☒ Male

☐ Female

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Dependent Student: Race and Ethnicity (1 of 2 slides)

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Student Race and Ethnicity

Questions Used for Research Purposes Only and Do Not Affect Federal Student Aid Eligibility

Your answers will not

- affect the student's eligibility for federal student aid,
- be used in any aid calculations, or
- be shared with the schools to which the student applies.

What is the student's race and/or ethnicity?

Select all that apply and enter additional details in the spaces below.

☐ American Indian or Alaska Native

☐ Asian

☐ Black or African American

☐ Hispanic or Latino

☐ Middle Eastern or North African

☐ Native Hawaiian or Pacific Islander

☐ White

☐ Prefer not to answer

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Continue

Dependent Student: Race and Ethnicity (2 of 2 slides)

What is the student's race and/or ethnicity?
Select all that apply and enter additional details in the spaces below.

☐ American Indian or Alaska Native

☒ Asian

☐ Chinese
☐ Asian Indian
☒ Filipino
☐ Vietnamese
☐ Korean
☐ Japanese

Other Asian (Enter, for example, Pakistani, Hmong, Afghan, etc.)

☐ Black or African American

☐ Hispanic or Latino

☐ Middle Eastern or North African

☐ Native Hawaiian or Pacific Islander

☐ White

☐ Prefer not to answer

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 **Hi! Need help?**

Dependent Student: Citizenship Status

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Student Citizenship Status ⓘ

☒ U.S. citizen or national

☐ Eligible noncitizen

☐ Neither U.S. citizen nor eligible noncitizen

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Dependent Student: Parent Education Status

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Parent Education Status

Did either of the student's parents attend college or complete college?

Neither parent attended college

One or both parents attended college, but neither parent completed college

One or both parents completed college

Don't know

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Dependent Student: Parent Killed in Line of Duty

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Parent Killed in Line of Duty

Was the student’s parent or guardian killed in the line of duty while either (1) serving on active duty as a member of the U.S. armed forces on or after the events of 9/11, or (2) performing official duties as a public safety officer?

Public safety officers include law enforcement officers, firefighters, and emergency service workers.

☐

Yes

☒

No

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Dependent Student: High School Completion Status

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Review & Sign

Student High School Completion Status

Will the student be done with high school when they start their college classes for the 2027–28 school year? ⓘ

If the student completed high school outside of the U.S., select "Yes (high school diploma)."

☒ Yes (high school diploma)

☐ Yes (GED or other state-recognized high school equivalent)

☐ Yes (homeschooling under state law)

☐ No, none of the above

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Dependent Student: High School Information (1 of 2 slides)

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Review & Sign

Student High School Information

From what high school did or will the student graduate? ⓘ

Search for The Student's High School

Attend a School outside of the US? [Manually Add Foreign School](#)

State

Texas (TX)

East Central H S

East Central Cast Lead H S

East Central

Search

68

Dependent Student: High School Information (2 of 2 slides)

State

Texas (TX)

City

San Antonio

High School Name

East Central H S

optional

Search

Search Results 1 to 1 of 1

SORT BY:

Most Relevant

A-Z

East Central H S

San Antonio, Texas (TX)

Search Again

Is the student's school not listed?

Add school manually

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Hi! Need help?

Dependent Student: Confirm High School

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Review & Sign

Confirm Your High School

Verify that your high school information below is correct. Once you're ready, select "Continue" and we'll add it to your FAFSA[®] form.

High School Name

East Central H S

Edit

City

San Antonio

State

TX

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Continue

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Review & Sign

Your Finances

The FAFSA[®] form helps determine your ability to pay for school. We ask about your financial information in this section.

What if you have special financial circumstances?

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Dependent Student: Tax Filing Status

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Review & Sign

Student Tax Filing Status

Did the student file a U.S. federal income tax return for 2025 (or will they)?

The federal income tax form is called IRS Form 1040 or 1040-NR.

☒ Yes

☐ No

Did the student file a 2025 income tax return in Puerto Rico or another U.S. territory (or will they)?

☐ Yes

☒ No

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Dependent Student: Tax Return Information (1 of 2 slides)

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Review & Sign

Student 2025 Tax Return Information

Refer to the student's 2025 tax return to answer the following questions.
If the answer is zero or the question does not apply, enter 0.

[Where to find this information on the tax form](#)

Filing Status

☒ Single

☐ Head of household

☐ Married filing jointly

☐ Married filing separately

☐ Qualifying surviving spouse

Dependent Student: Tax Return Information (2 of 2 slides)

Income Earned From Work

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.

\$

.00

Tax Exempt Interest Income

IRS Form 1040: Line 2a

\$

.00

Retirement Income: Untaxed Amount of IRA Distributions

IRS Form 1040: Line 4a minus Line 4b

\$

.00

Retirement Income: Untaxed Amount of Pensions

IRS Form 1040: Line 5a minus Line 5b

\$

.00

Adjusted Gross Income

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

\$

.00

Income Tax Paid

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

\$

.00

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

\$

.00

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

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

\$

.00

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

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

\$

.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.

\$

.00

1

Foreign Earned Income Exclusion

If you qualified for this exclusion, you entered the amount on Schedule 1 (IRS Form 1040), Line 8d. (Note: Schedule 1 is an additional form attached to the 1040.) Add that amount here.

\$

.00

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Dependent Student: Assets

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Review & Sign

Student Assets

Current Total of Cash, Savings, and Checking Accounts

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

\$100.00

Current Net Worth of Investments, Including Real Estate

Don't include retirement accounts or 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

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Introduction: Dependent Student Selects Schools

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Review & Sign

Select Colleges and Career Schools

Search for and select colleges and career schools you're considering so they automatically receive an electronic copy of the FAFSA[®] form.



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Dependent Student: School Search (1 of 4 slides)

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Review & Sign

Where should we send the FAFSA[®] information?

You can add more schools after submitting your form.

0 out of 20 schools selected

View Selected Schools

Search by School Name or Code

Search by Location

School Name or Code

Search

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Dependent Student: School Search (2 of 4 slides)

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Review & Sign

What information do you want to add to your form?

UNIVERSITY OF TEXAS-AUSTIN
AUSTIN, TX003658

UNIVERSITY OF TEXAS-EL PASO
EL PASO, TX003661

UNIVERSITY OF TEXAS AT TYLER
TYLER, TX011163

UNIVERSITY OF TEXAS-ARLINGTON
ARLINGTON, TX003656

UNIVERSITY OF TEXAS AT DALLAS
RICHARDSON, TX009741

University of Texas

Search

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Dependent Student: School Search (3 of 4 slides)

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Review & Sign

Where should we send the FAFSA[®] information?

You can add more schools after submitting your form.

1 out of 20 schools selected

View Selected Schools

Search by School Name or Code

Search by Location

State

Texas (TX)

City

Austin

optional

Search

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Dependent Student: School Search (4 of 4 slides)

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Review & Sign

Where should we send the FAFSA[®] information?

You can add more schools after submitting your form.

1 out of 20 schools selected

View Selected Schools

Search by School Name or Code

Search by Location

School Name or Code

UNIVERSITY OF TEXAS-AUSTIN

Search

Search Results 1 of 1

UNIVERSITY OF TEXAS-AUSTIN

Austin, Texas (TX)

Federal School Code

003658

Selected

Search and Select More Schools

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Dependent Student: Selected Colleges

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Review & Sign

Selected Colleges and Career Schools

These are the colleges and career schools that you've selected to receive the FAFSA[®] form.

Review this list of schools and confirm your selection(s).

School List Guidelines for Texas Residents

To be eligible for state grant aid in Texas, you must list an eligible in-state college. The order of schools in your college list will not impact your eligibility for state aid programs.

1 out of 20 schools selected

Showing 1 of 1

University of Texas-austin
Austin, Texas (TX)

Federal School Code
003658

Remove

View Information

Search and Select More Schools

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Introduction: Dependent Student Invites Contributor

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Contributor Invite

Review & Sign

Invite a Parent as a Contributor

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

You shouldn't invite a stepparent or legal guardian (such as a grandparent or foster parent) unless they have legally adopted you. Your legal parent will invite your stepparent to the form if needed. Stepparents and other types of guardians do not count unless they have legally adopted the student.

Who should I invite as a parent on the FAFSA form?

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Dependent Student: Invite Contributor (1 of 3 slides)

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Review & Sign

Invite One Parent to This FAFSA[®] Form

You'll need to invite one parent only because we need more information about your household financial situation to determine your eligibility for federal student aid.

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

Who should I invite as a parent on the FAFSA form?

Parent

Invite a Parent Contributor

Email

599888214test@testcod.edu

Send Invite

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Dependent Student: Invite Contributor (2 of 3 slides)

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Contributor Invite

Review & Sign

Invite One Parent to This FAFSA[®] Form

You'll need to invite one parent only because we need more information about your household financial situation to determine your eligibility for federal student aid.

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

Send Invite to 599888214test@testcod.edu?

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

Go Back

Send Invite

599888214test@testcod.edu

Send Invite

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Dependent Student: Invite Contributor (3 of 3 slides)

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Contributor Invite

Review & Sign

Parent Contributor

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

You can check the status of contributor invitations from the “My Activity” page.

Parent

599888214test@testcod.edu

Invite Sent

Other ways to send the invite

Copy and Send the Invite Link

www.fafsa.gov/invite/8MHN9QV

Copy Link

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

8MHN9QV

Cancel Invite

Introduction: Dependent Student Reviews and Signs Their Form

FAFSA[®] FORM 2027-28  Student George Gutierrez  Save | FAFSA Menu 



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You're Almost Done!

- Review your answers on the next page.
- Select "Continue" on the review page to sign your section.
- Make sure your contributor completes their section and your FAFSA form is submitted.



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Dependent Student: Review Page (1 of 3 slides)

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Review & Sign

Review and Sign Your Section

If you need to change any of your responses, select the question to return to that page. Otherwise, sign and finish your section.

✔ Scroll To Continue

After reviewing your answers, scroll to the bottom of the page and select "Continue." Then, sign your section of the FAFSA form.

Student Sections Updated

Expand All

✔ Introduction

Personal Identifiers

✔ Section 1

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✔ Section 2

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✔ Section 3

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✔ Section 4

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Contributor Section

This Section is Shared with 1 Contributor(s)

Manage Contributor Information

Contributor(s)	Role	Invite Code	Status
599888214test@testcodedu	Parent	8MHN90V	<div>Invite Sent</div>

Terms and Conditions

Dependent Student: Review Page (2 of 3 slides)

Terms and Conditions

Confirm that you understand the terms and conditions of the FAFSA® form and filled out your section of the form accurately to the best of your ability.

[View Terms & Conditions](#)

⚠ Not Viewed

Sign and Submit Your FAFSA® Form ⓘ

☐ I, George Gutierrez, agree to the terms outlined above.

The Form Isn't Ready To Submit

One or more contributors still need to complete their section. After the other contributor(s) complete their section, they can submit the form.

- Finish your section now.
- Reach out to the other contributor(s) and ask them to complete their section and submit the form.

[Previous](#)

[Finish Student Section](#)

Terms and Conditions

Note:

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

- 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.

[Done](#)

Dependent Student: Review Page (3 of 3 slides)

Terms and Conditions

Confirm that you understand the terms and conditions of the FAFSA® form and filled out your section of the form accurately to the best of your ability.

[View Terms & Conditions](#)✓ Viewed

Sign and Submit Your FAFSA® Form ⓘ

☒ I, George Gutierrez, agree to the terms outlined above.

The Form Isn't Ready To Submit

One or more contributors still need to complete their section. After the other contributor(s) complete their section, they can submit the form.

- Finish your section now.
- Reach out to the other contributor(s) and ask them to complete their section and submit the form.

[Previous](#)[Finish Student Section](#)

Dependent Student: Section Complete (1 of 2 slides)

FAFSA[®] FORM 2027–28

Student George Gutierrez

Save | FAFSA Menu

✓ Student Section

2 Parent Section

Pending Submission

Check With Your Contributor

Parent Contributors

Requirements for Dependent Students

Your FAFSA[®] form is not complete until your parent(s) fill in the contributor section of the form and sign it. Once completed, your FAFSA form will be submitted for processing.

Contributor(s)	Role	Invite Code	Status
<div><div></div>599888214test@testcod.edu</div>	Parent	8Mi-IN9QV	<div>✓ Invite Sent</div>

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

Hi! Need help?

Dependent Student: Section Complete (2 of 2 slides)

Here's What You Can Do Next



Check Your Email

You'll receive an email version of this page at the following email address:
599888270test@testcod.edu.



Your FAFSA® Form Still Needs Contributor Information

The contributor(s) you selected will receive an email invitation to join your form.

Things You Should Know



View Your FAFSA® Submission Summary

Once your application is complete and submitted, you can view your FAFSA Submission Summary, a summary of the information you provided on your FAFSA form. You'll be able to access the FAFSA Submission Summary after your form is processed. Most FAFSA forms are processed immediately, but some take one to three days.

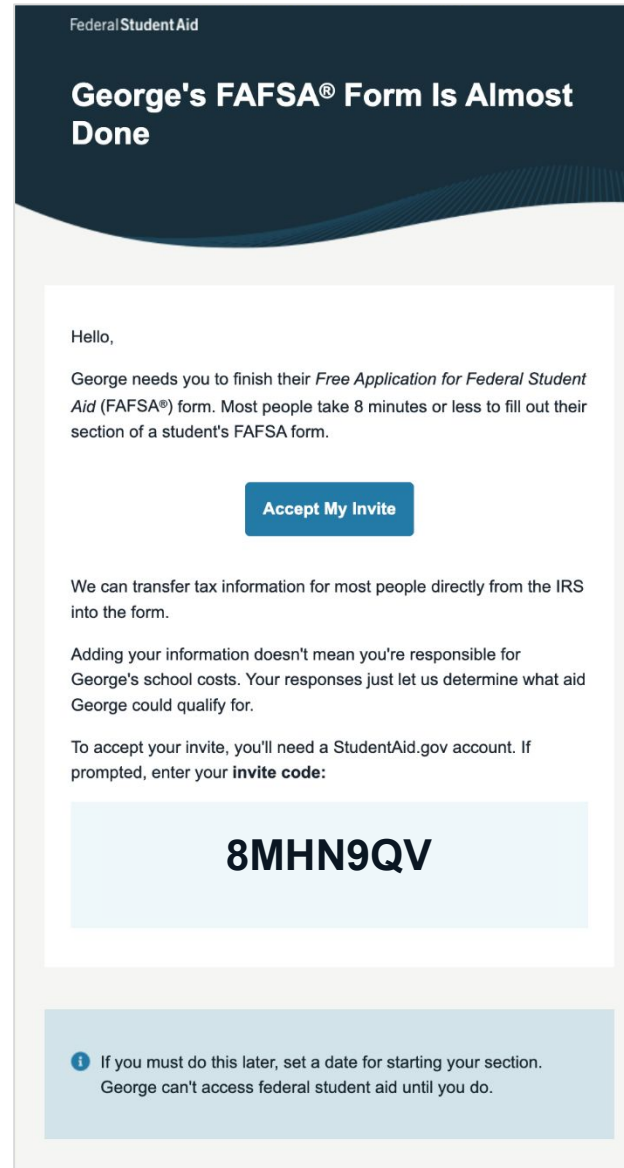


Questions About The FAFSA® Process?

Visit the "FAFSA Help" page for more information.

[Get Help](#)

Dependent Student: Parent Email



Dependent Student: Parent Login To Accept Invite

[← FAFSA Home Page](#)

Accept FAFSA® Invitation

Login to your account and enter the code you received for the FAFSA form.

Login to Accept Invite

How long will my section take?

 8 min

Need to accept an invitation for a different year?

Go to "[My Activity](#)" to find any existing invitations for a previous year's FAFSA form.

Why do we need your information?

We need your information to determine if the student qualifies for federal grants, work-study jobs, and/or loans. This doesn't make you responsible for the student's school costs.

Don't have an invitation code?

Speak with the person who invited you to the form and ensure they have sent it to your email. Check your inbox for your invitation code.

Dependent Student: Parent Log In

Log In

Email Address or Username



[Forgot email address or username?](#)

Continue

[Create an Account](#)

Log In

← 599888270test

Password

 [Show Password](#)

[Forgot password?](#)

Log In

[Create an Account](#)

Dependent Student: Parent Accepts Invitation (1 of 2 slides)

[← FAFSA Home Page](#)

Accept FAFSA® Invitation

Enter the code you received for the FAFSA form.

Invitation Code

Accept Invite

How long will my section take?

 8 min

Need to accept an invitation for a different year?

Go to "[My Activity](#)" to find any existing invitations for a previous year's FAFSA form.

Why do we need your information?

We need your information to determine if the student qualifies for federal grants, work-study jobs, and/or loans. This doesn't make you responsible for the student's school costs.

Don't have an invitation code?

Speak with the person who invited you to the form and ensure they have sent it to your email. Check your inbox for your invitation code.

Dependent Student: Parent Accepts Invitation (2 of 2 slides)

← FAFSA Home Page

Accept FAFSA® Invitation

Enter the code you received in your email

Invitation Code

8MHN9QV

How long will my section take?
⌚ 8 min

George G invited you to their FAFSA® form.

George G invited you to their FAFSA® form.

If you know George G and want to join this FAFSA form as a contributor, select "Accept."

If you don't want to join this FAFSA form, select "Decline."

[Decline](#) [Accept](#)

Need to accept a FAFSA invitation for a different year?

Go to "My Account" to view all invitations for your FAFSA form.

Don't have an invitation code?

Speak with the person who invited you to the form and ensure they have sent it to your email. Check your inbox for your invitation code.

Need more information?

Go to "My Account" to view all invitations for your FAFSA form. You can also visit the FAFSA website for more information on how to complete the form, how to qualify for federal financial aid, and/or how to apply for federal financial aid at your school.

Dependent Student: Parent Identity Information (1 of 2 slides)

FAFSA[®] FORM
2027–28

Parent of George Gutierrez

Save

FAFSA Menu



Parent Identity Information

Review the information below and verify that it's correct before moving forward.

[Learn about how we use the information we collect on the FAFSA[®] form.](#)

Name

Ben Z Gutierrez

Date of Birth

03/14/2004

Social Security Number

•••••-8223

Email Address

599888223test@testcod.edu

Mobile Phone Number

(555) 557-6184

To update this information for all U.S. Department of Education communications, go to [Account Settings](#).

Dependent Student: Parent Identity Information (2 of 2 slides)

Permanent Mailing Address

Include apartment number.

80000 Lane

City

San Antonio

State

TX

Zip Code

00000

Country

US

Continue

Dependent Student: Parent Provides Consent and Approval (1 of 2 slides)

FAFSA[®] FORM 2027–28  Parent of George Gutierrez  Save |  FAFSA Menu

 **Consent and Approval Will Be Applied To All FAFSA Applications**
By providing consent and approval, you approve the use and disclosure of 2025 federal tax information to the U.S. Department of Education for the purpose of completing this and all other 2027–28 FAFSA[®] forms.

Provide Consent and Approval or the Student 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 your section of the student's FAFSA[®] form. If you don't provide consent and approval, the student 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 2025 tax return information for the 2027–28 FAFSA form.
- Federal tax information is used to determine the student's eligibility for federal student aid.
- Tax return information is required to complete the FAFSA form.

By accepting below, I consent to the disclosure of information about me, as described below, and further affirmatively approve of the receipt and use of my federal tax information and to the U.S. Department of Education (ED)'s redisclosure of my federal tax information, as described below. By accepting below, I consent to and affirmatively approve of, as applicable, the following:

1. ED may disclose my 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 my approval for the use of my 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(d)(13)(E)] for the purpose of determining eligibility for and the amount of federal

Dependent Student: Parent Provides Consent and Approval (2 of 2 slides)

3. ED may redisclose my federal tax information received from the IRS pursuant to 26 U.S.C. § 6103(l)(13)(D)(iii) to the following entities solely for the use in the application, award, and administration of financial aid:

- Institutions of higher education participating in the federal student aid programs authorized under subpart 1 of part A, part C, or part D of *Title IV of the Higher Education Act of 1965*, as amended
- State higher education agencies
- Scholarship organizations designated prior to Dec. 19, 2019, by the secretary of education
- Contractors of institutions of higher education and state higher education agencies to administer aspects of the institution's or state agency's activities for the application, award, and administration of such financial aid

4. ED may redisclose my federal tax information to another FAFSA applicant's FAFSA form(s) for which I elect to participate. By accepting an invitation and affirmation to participate in another individual's FAFSA form, my federal tax information will be redisclosed to the additional application. I understand that I may decline an invitation to participate, which will prevent the transfer of my federal tax information to that FAFSA form.

By consenting and providing my affirmative approval, I further understand the following:

1. My consent and affirmative approval are required, as a condition of my eligibility or the eligibility of a FAFSA applicant who has requested that I share my federal tax information on their FAFSA form, for 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, even if I did not file a U.S. federal tax return.
2. I am providing my written consent for the redisclosure of my federal tax information by ED to include, but not limited to, institutions of higher education, state higher education agencies, designated scholarship organizations, their respective contractors and auditors, other family members participating in the FAFSA form, Office of Inspector General, under 26 U.S.C. § 6103(l)(13)(D), and with my further express written consent obtained by an institution of higher education, the redisclosure of FAFSA information pursuant to the terms and conditions of 20 U.S.C. § 1098h(c).
3. Any federal tax information received from the IRS at a later date shall supersede any manually entered financial or income information on the FAFSA form.
4. ED may request updated federal tax information from the IRS once my consent and approval are provided. If federal tax information has changed (e.g., amended tax return filed with revised information), then eligibility for and amounts of federal, state, and institutional financial aid may change.
5. If I do not consent to the redisclosure of my federal tax information to institutions of higher education, state higher education agencies, designated scholarship organizations, and their respective contractors, ED will be unable to calculate my eligibility for federal student aid or the eligibility of a FAFSA applicant who has requested that I share my federal tax information on their FAFSA form.

5. If I do not consent to the redisclosure of my federal tax information to institutions of higher education, state higher education agencies, designated scholarship organizations, and their respective contractors, ED will be unable to calculate my eligibility for federal student aid or the eligibility of a FAFSA applicant who has requested that I share my federal tax information on their FAFSA form.

By accepting below, I consent electronically to the use of my StudentAid.gov account username and password (FSA ID) as my signature and certify under penalty of perjury under the laws of the United States of America, that the foregoing is true and correct. I understand that any falsification of this statement is punishable under the provisions of 18 U.S.C. § 1001 by a fine, imprisonment of not more than five years, or both, and that the knowing and willful request for or acquisition of records pertaining to an individual under false pretenses is a criminal offense under the *Privacy Act of 1974*, subject to a fine of not more than \$5,000 fine (5 U.S.C. § 552(a)(i)(3)). By accepting and submitting my part of the FAFSA form, my execution (including date and time) of consent and approval will be logged in ED's Person Authentication Service System of Record (18-11-12).

Frequently Asked Questions

Who should provide consent and approval?

⌵

If I'm married and didn't file a joint tax return with my current spouse, does my spouse have to provide consent and approval for you to access their tax information?

⌵

What happens after I provide consent and approval?

⌵

What happens if I decline consent and approval?

⌵

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

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Decline

Approve

Dependent Student: Parent Imports IRS Information (1 of 2 slides)

FAFSA[®] FORM
2027-28



Parent of George Gutierrez



Save

FAFSA Menu



We're securely importing your information.

Do not leave this page while your information is being imported into your application.



Loading...

Dependent Student: Parent Imports IRS Information (2 of 2 slides)

FAFSA[®]

FORM
2027–28

Parent of George Gutierrez

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FAFSA Menu



We're securely importing your information.



Sorry, data could not be retrieved. Select "Continue" to proceed.

We were unable to retrieve your financial information from the IRS, so you'll need to enter it yourself in the Finances section.

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Introduction: Dependent Student's Parent Demographics

FAFSA[®]

FORM

2027–28

 Parent of **George Gutierrez**

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Review & Sign

Parent Demographics

We'll ask questions about you and your family. These questions will help determine how much federal student aid the student is eligible to receive for school.



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Dependent Student: Parent Current Marital Status

FAFSA[®] FORM 2027-28

Parent of George Gutierrez

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DemographicsFinancialsReview & Sign

Parent Current Marital Status ⓘ

☐ Single (never married)

☐ Unmarried and both legal parents living together

☒ Married (not separated)

☐ Remarried

☐ Separated

☐ Divorced

☐ Widowed

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Continue

Dependent Student: Parent State of Residence

FAFSA[®]

FORM 2027-28

Parent of George Gutierrez

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Parent State of Residence

State, Country, or Military Location

If the parent lives outside the U.S. and Canada, choose "Foreign Country (FC)."

If the parent moved to a foreign country because they or their spouse serves in the U.S. armed forces, type "Military." Then, pick the correct option from the list that displays.

Texas (TX)

Date the Parent Became a Resident of Texas (TX)

If the parent has always lived in Texas (TX), enter their birth month and year. If not, enter the month and year they moved to Texas (TX). Enter an approximate date if you don't know the exact date.

Month

Year

01

2005

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Introduction: Dependent Student's Parent Finances

FAFSA[®] FORM
2027-28

 Parent of George Gutierrez



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Review & Sign

Parent Finances

The FAFSA[®] form helps determine the student's eligibility for federal student aid. We ask about your financial information in this section.

[What if you have special financial circumstances?](#)



Dependent Student: Parent Federal Benefits Received

FAFSA[®] FORM
2027–28

Parent of George Gutierrez

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Federal Benefits Received

Responses Won't Reduce Federal Student Aid Eligibility

Answering these questions won't reduce the student's eligibility for federal student aid or these programs.

In 2025 or 2026, did the parent, or anyone in their family, get benefits from any of the federal programs listed below?

A parent's family includes their spouse, children, and other dependents. Select all programs that apply.

☐ Medicaid

☐ Supplemental Nutrition Assistance Program (SNAP)

☐ Free or Reduced Price School Lunch (based on income)

☐ Earned Income Tax Credit (EITC)

☐ Lower Premiums for a Plan Purchased Through the Health Insurance Marketplace

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

☐ Supplemental Security Income (SSI)

☐ Federal Housing Assistance (for example, Housing Choice Voucher (Section 8) or public housing)

☐ Temporary Assistance for Needy Families (TANF)

☒ None of these apply.

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Dependent Student: Parent Tax Filing Status

FAFSA[®] FORM 2027–28

Parent of George Gutierrez

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DemographicsFinancialsContributor InviteReview & Sign

Parent Tax Filing Status

Did the parent file a U.S. federal income tax return for 2025 (or will they)? ⓘ

Did the parent file a U.S. federal income tax return for 2025 (or will they)?

☒ Yes

☐ No

Did the parent file a 2025 income tax return in Puerto Rico or another U.S. territory (or will they)? ⓘ

☐ Yes

☒ No

Did the parent file their 2025 tax return jointly with their current spouse (or will they)? ⓘ

☒ Yes

☐ No

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Parent of George Gutierrez

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Family Size

Based on answers to previous questions, we've made some assumptions about your 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 your family size based on our assumptions and the number of children or other dependents you report.

The parent's family size is 2.

Parent: 1 Student: 1 Parent's Children and Other Dependents: 0

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, 2027, and June 30, 2028.

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

Do not include the student applicant.

0

i

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FAFSA[®] FORM
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Parent of George Gutierrez

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FAFSA Menu



Number in College

How many people in the parent's family will be in college between July 1, 2027, and June 30, 2028?

Do not include parent(s).

 ⓘ

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Dependent Student: Parent Assets (1 of 2 slides)

FAFSA[®]

FORM 2027–28

Parent of George Gutierrez

SaveFAFSA Menu

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Financials

Review & Sign

Parent 2025 Tax Return Information

Refer to the parent's 2025 tax return to answer the following questions.
If the answer is zero or the question does not apply, enter 0.

i

Report Combined Taxes

Report the combined tax information for the parent and their spouse.

Where to find this information on the tax form

Filing Status

Single

Head of household

Married filing jointly

Married filing separately

Qualifying surviving spouse

Dependent Student: Parent Assets (2 of 2 slides)

Income Earned From Work

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.

\$

0

.00

Tax Exempt Interest Income

IRS Form 1040: Line 2a

\$

0

.00

Retirement Income: Untaxed Amount of IRA Distributions

IRS Form 1040: Line 4a minus Line 4b

\$

0

.00

Retirement Income: Untaxed Amount of Pensions

IRS Form 1040: Line 5a minus Line 5b

\$

0

.00

Adjusted Gross Income

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

\$

0

.00

Income Tax Paid

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

\$

0

.00

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 parent file a Schedule A, B, D, E, F, or H with their 2025 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 AmeriCorp Benefits Reported as Income to the IRS

The parent paid taxes on these grants, scholarships, or benefits. These usually apply to those completing their FAFSA® form again, not to first-time applicants. If married, include amount parent's spouse/partner received.

\$

.00 ⓘ

Foreign Earned Income Exclusion

If you qualified for this exclusion, you entered the amount on Schedule 1 (IRS Form 1040), Line 8d. (Note: Schedule 1 is an additional form attached to the 1040.) Add that amount here.

\$

0

.00 ⓘ

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Continue

FAFSA[®]

FORM 2027–28

Parent of George Gutierrez

Save

✓

2

3

DemographicsFinancialsReview & Sign

Parent Spouse Information

Based on your responses, we need to know your spouse's date of birth.

We need to know their age to determine the student's eligibility for federal student aid.

Month

Day

Year

01

01

1980

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Continue

Introduction: Dependent Student's Parent Reviews and Signs Their Form

FAFSA[®] FORM 2027-28 Parent of George Gutierrez Save FAFSA Menu

✓

Demographics

✓

Financials

3

Review & Sign

You're Almost Done!

- Review your answers on the next page.
- Select "Continue" on the review page to sign and submit the form.

Previous

Continue

Dependent Student: Parent Review Page (1 of 2 slides)

FAFSA[®] FORM
2027-28

Parent of George Gutierrez

SaveFAFSA Menu

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Financials

Review & Sign

Review and Sign Your Section

If you need to change any of your responses, select the question to return to that page. Otherwise, sign and finish your section.

Scroll To Continue

After reviewing your answers, scroll to the bottom of the page to continue.

Parent Sections

Expand All

Introduction

Personal Identifiers

Section 1

Demographics

Section 2

Financials

Terms and Conditions

Confirm that you understand the terms and conditions of the FAFSA[®] form and filled out your section of the form accurately to the best of your ability.

View Terms & Conditions

Not Viewed

Sign for yourself and submit the application for George Gutierrez (Student).

☐ I, Ben Gutierrez, agree to the terms outlined above.

The Form Is Ready To Submit

All contributors have completed their sections. You can now submit the FAFSA[®] form for processing.

Previous

Submit FAFSA Form

Terms and Conditions

Note:

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 the student's application electronically using your StudentAid.gov account username and password, YOU, THE PARENT, 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.

Done

Dependent Student: Parent Review Page (2 of 2 slides)

FAFSA[®] FORM 2027-28

Parent of George Gutierrez

Save | FAFSA Menu

Demographics

Financials

Review & Sign

Review and Sign Your Section

If you need to change any of your responses, select the question to return to that page. Otherwise, sign and finish your section.

Scroll To Continue

After reviewing your answers, scroll to the bottom of the page to continue.

Parent Sections

Expand All

Introduction

Personal Identifiers

Section 1

Demographics

Section 2

Financials

Terms and Conditions

Confirm that you understand the terms and conditions of the FAFSA[®] form and filled out your section of the form accurately to the best of your ability.

View Terms & Conditions

Viewed

Sign for yourself and submit the application for George Gutierrez (Student).

☒ I, Ben Gutierrez, agree to the terms outlined above.

The Form Is Ready To Submit

All contributors have completed their sections. You can now submit the FAFSA[®] form for processing.

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Submit FAFSA Form

Dependent Student: Parent Confirmation (1 of 2 slides)

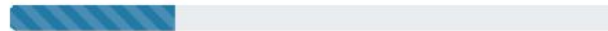
FAFSA[®] FORM
2027–28

 Parent of George Gutierrez



Hold tight—we're processing your FAFSA[®] form.

Stay on this page to see your next steps.



Sending for Processing

Dependent Student: Parent Confirmation (2 of 2 slides)

FAFSA[®] FORM 2027-28  Parent of George Gutierrez



Congratulations!

The student's FAFSA[®] form has been processed!

What to Know Now

1. The student's FAFSA Submission Summary has estimates of their eligibility for federal student aid.
2. The student should review the "Next Steps" section of their FAFSA Submission Summary to make sure there are no issues with their form. They'll also get an email.
3. Schools will contact the student. If a school needs more information to determine how much aid the student is eligible for, they'll reach out. Schools will also send financial aid offers. If the student has a question about a school's student aid package, they should contact the school's financial aid office directly.

[Return to My Dashboard](#)

Student: Identity Verification Needed

✓
Section 1
Financials

Identity Verification Needed

We've flagged your FAFSA form for potential fraud. Clear this up right now by verifying your identity. You will need:



Your government-issued photo ID



Your smartphone or tablet

[Get started](#)

powered by  Socure

[Decline Identity Verification](#)

If you decline to verify your identity now, you won't be able to get federal student aid until a school verifies your identity.

[Get Help](#) | [Site Survey](#)

[About Us](#) | [Announcements](#) | [Data Center](#) | [Resources](#) | [Forms Library](#)

 **Hi! Need help?**

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Student: Identity Verification Hand-off to Mobile Device

Financials

Continue on your mobile device

No device? Select 'Decline Identity Verification.' Then contact any of your schools to be verified.

Option 1: Receive a link via SMS text message

We'll text a secure link to the number you enter.

+1

Standard messaging and data rates may apply

Send SMS

Option 2: Scan QR code

Use your mobile device's camera to scan the QR Code below. Select the link that appears on your device's screen to continue.



powered by  Socure

[Decline Identity Verification](#)

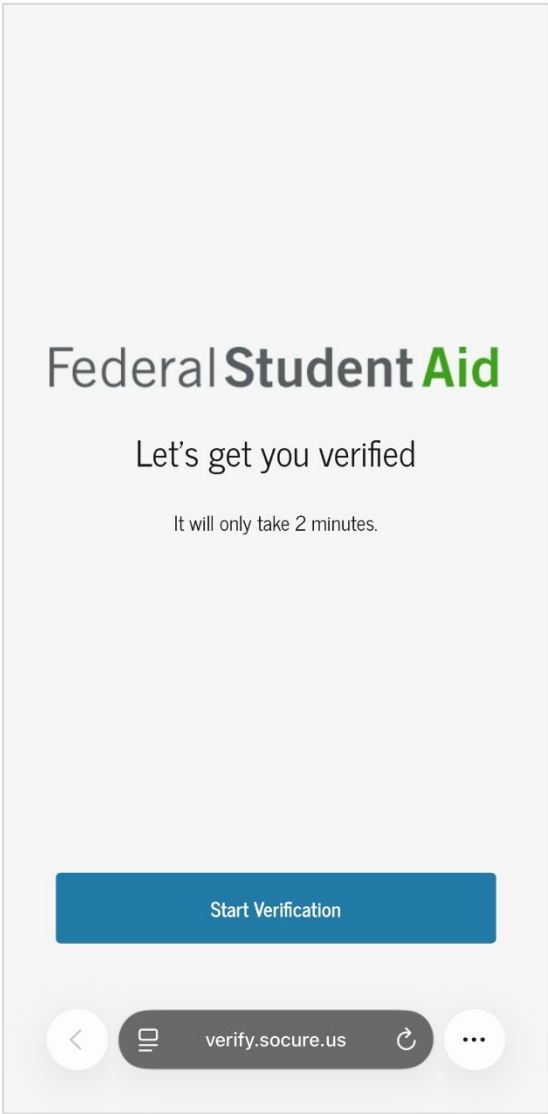
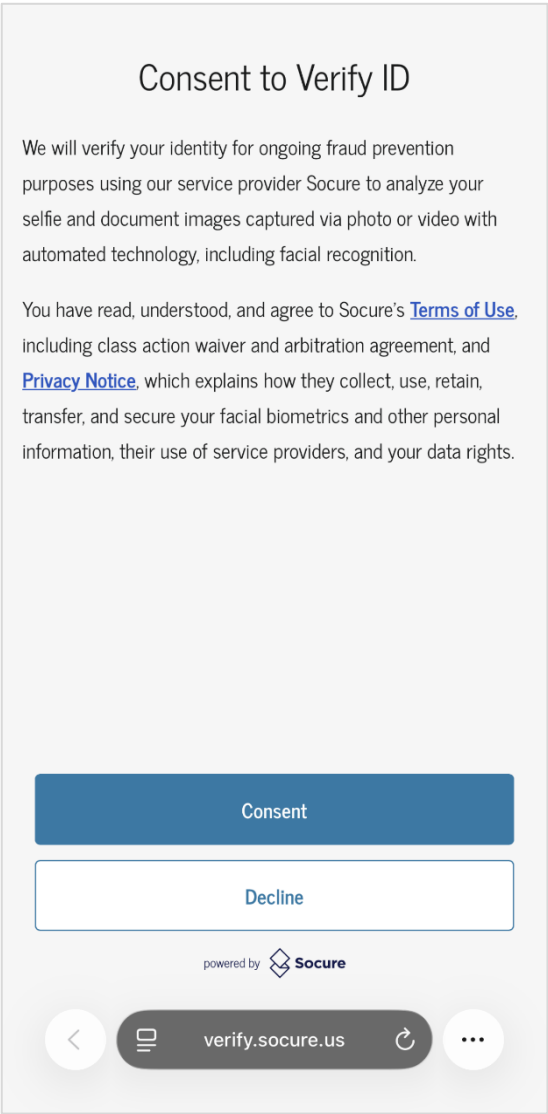
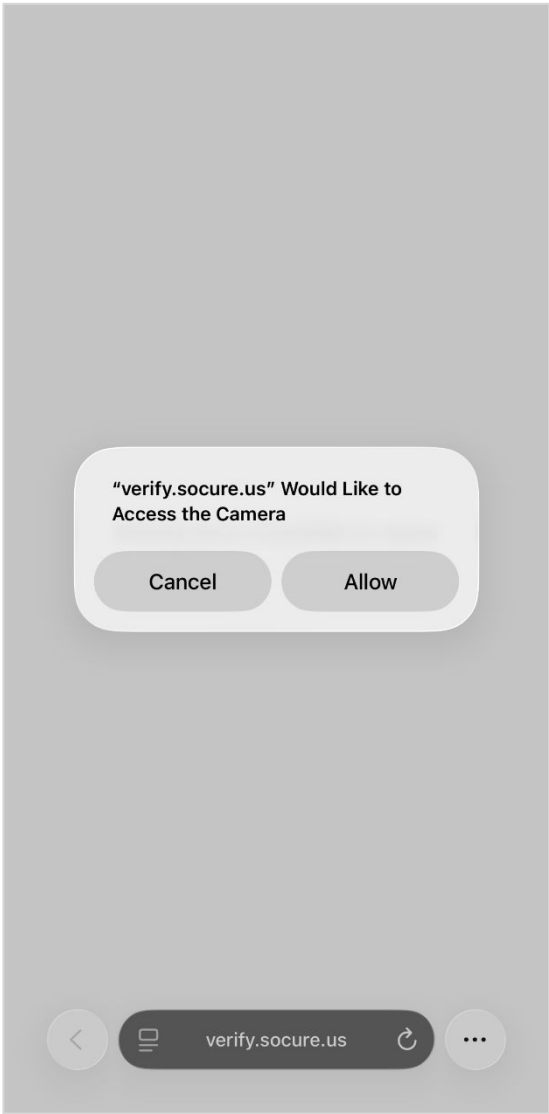
If you decline to verify your identity now, you won't be able to get federal student aid until a school verifies your identity.

Get Help | Site Survey

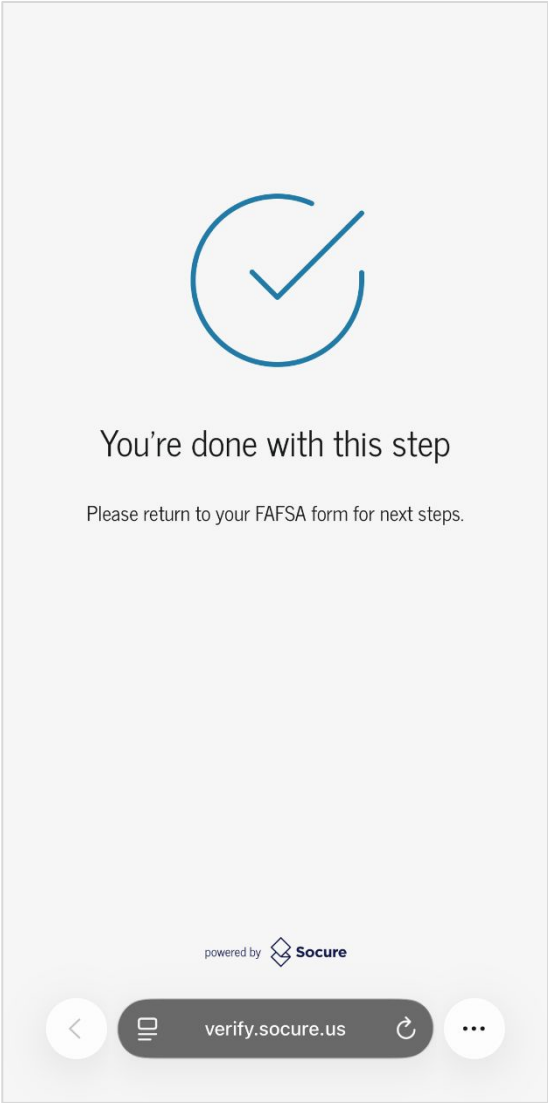
Resources | Forms Library

 **Hi! Need help?**

Student: Identity Verification Mobile Screenshots



Student: Identity Verification Success



Next Steps

- If your FAFSA is flagged for verification, complete the requested documents for each school.
- Review Financial Aid Offers and determine the funding that needs to be accepted. Note: you can accept, decline or reduce loan amounts.
- **If Accepting loan**, the student must complete **Loan Entrance Counseling** and the **Master Promissory Note**.
- If the student wants to allow the school to provide information to a parent, the student will need to sign a **FERPA** form.
- Determine if there will be remaining out of pocket costs to pay and how that will be taken care of.
 - Payment Plan
 - Parent Plus Loan
 - Alternative Loan

QUESTIONS?

Sue Bialk

Financial Aid & Educational Funding

bialkse@lakeland.edu

920-565-1032 ext. 2377