



# FAFSA Checklist 2017–2018

**NEW**  
filing date  
**October 1,**  
**2016**

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

The Free Application for Federal Student Aid (FAFSA) is used to apply for federal, state and college-based financial aid. You should file a FAFSA **as soon as possible after Oct. 1, 2016**. Awards are income-based, so applying early does not guarantee you will get an award.

## What you will need:

- FSA ID for **both** the student and the dependent student's parent/stepparent
- Your Social Security number
- Your alien registration number (if you are not a U.S. citizen)
- Your 2015 federal income tax returns, W-2s and other records of money earned.
- Bank statements and records of investments (if applicable)
- Records of untaxed income (if applicable)

If you are a dependent student, **you will also need most of the above information for your parent(s).**

## How long will it take?



FSA ID:

**20 minutes**

Initial Application:

**30 minutes**

Renewal Application:

**20 minutes**

FAFSA Corrections:

**10 minutes**

**Need help? Call 800.4FEDAID**

# Federal Student Aid ID

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

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

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



## Tips for Step 3:

1. You'll have to set two challenge questions on your own.

Examples: mother/father's middle name/ high school name or mascot, city of birth

2. You'll be asked to provide a significant date of your choice.

Examples: birth, anniversary or another easy-to-remember date.

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

## Are you dependent or independent?

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

- Were you born before January 1, 1994?
- As of today, are you married? (Also, answer "Yes" if you are separated but not divorced.)
- At the beginning of the 2017–2018 school year, will you be working on a master's or doctoral program (such as an MA, MBA, MD, JD, PhD, EdD or graduate certificate, etc.)?
- Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
- Are you a veteran of the U.S. Armed Forces?
- Do you now have or will you have children who will receive more than half of their support from you between July 1, 2017 and June 30, 2018?
- Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2018?
- At any time since you turned age 13, were both of your parents deceased, or were you in foster care or were you a dependent or ward of the court?
- As determined by a court in your state of legal residence, are you now or were you, upon reaching the age or majority, an emancipated minor (released from control by your parent or guardian)?
- As determined by a court in your legal state of residence, are you now or were you, upon reaching the age of majority, in legal guardianship (of someone other than your parent or stepparent)?
- At any time on or **after** July 1, 2016, did your high school or school district homeless liaison, the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development, the director of a runaway or homeless youth basic center or transitional living program **or** a college financial aid administrator determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?

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

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

## Are you eligible for the Data Retrieval Tool?

**Some families will not be eligible to use the IRS Data Retrieval Tool.** If any of the following situations apply to you, you are **NOT** eligible to use the tool:

- Tax filing status is Married Filing Separately
- You are married and your tax filing status is Head of Household
- You are filing an amended tax return
- You are filing a foreign tax return

That means you'll need to update your information manually, using a copy of your completed 2015 tax return and any supporting documents. If the student's FAFSA is selected for verification, you must submit a tax return transcript. You may request a transcript by calling 1-800-908-9946 or by visiting [irs.gov/Individuals/Get-Transcript](https://www.irs.gov/Individuals/Get-Transcript).

Tax return transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return.

## Notes

---

---

---

---

---

---

---

---

---

---

# Financial Aid Application Process

Gather your income tax returns, W-2 forms and other documents needed to show your income when you apply.

Ask your school counselor about financial aid nights.

Speed up the process—go to [fsaid.ed.gov](https://fsaid.ed.gov) to create an FSA ID. With an FSA ID you can apply and sign your FAFSA online.

Complete other applications for private, state or school financial aid programs. Watch for deadlines!

Complete the FAFSA and return as soon as possible starting October 1. Apply online at [fafsa.gov](https://fafsa.gov).

Review your Student Aid Report (SAR) to find out your family's EFC. Make corrections and resubmit, if necessary.

Turn in any other documentation your school needs to verify your application information to the financial aid office.

Double-check that the financial aid office at each school you are applying to has all of the information needed to determine your eligibility.

Review your award letter from each school and compare the amount and types of aid that you will receive if you attend.

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

