

# FAFSA

## Check-List



Follow these steps to fill out the Free Application for Federal Student Aid (FAFSA) each year to apply for most types of financial aid.

The FAFSA opens December 2023 and the priority deadline for is May 2, 2024. Apply by the deadline for priority consideration.



### step #1: Create an FSA ID

The Federal Student Aid (FSA) ID is a username and password that is required to log in and access all Federal Student Aid websites, including the FAFSA. All students and contributors must have a FSA ID. The FSA ID serves as a legal signature when you submit your FAFSA.

Before you complete the FAFSA, you and the contributor (anyone who is required to provide information on the FAFSA) will need to create FSA IDs, including those with no social security numbers. These can take up to 5 days to be verified, so be sure to create these well before starting the FAFSA. If you have submitted your FAFSA in the past, you may have already created a FSA ID.

If you need help creating a FSA ID, we offer a presentation on our UC Davis FAFSA Simplification website that will go more in detail.



## step #2: Independent or Dependent?



Determine if you are an independent or dependent student.

**Independent Student:** Only report information about yourself (and your spouse if applicable)

**Dependent Student:** Report information about yourself and your parent(s) (this is the most common)

You are an independent student if at least one of these applies to you:

You will be 24 years of age or older as of January 2024.

You have a child or other dependent for whom you provide the majority of financial support.

You have a court-ordered legal guardian who is not your biological or adoptive parent.

You were in foster care at any point after age 13, or you were a ward of the court at any point after age 13.

You are currently married (but not separated or divorced).

You are homeless or at risk of being homeless.

Your parents are incarcerated or deceased.

You are currently on active duty or are a veteran of the U.S. armed forces.

If none of the above apply, you're a dependent student.



## step #3: Collect Student Documents



Collect all of the information and documents you need to submit.

**This must be submitted by both independent and dependent students. Be sure you have all of the information readily available when you are filling out your FAFSA.**

All students need to collect the following information:	Done?
Student FSA ID (username and password)	
Photo or copy of your social security card (if applicable)	
Photo or copy of your green card (if applicable)	
Give consent for your (the student's) 2022 federal tax forms to be pulled from the IRS by FAFSA (if applicable), or provide evidence of income earned (W-2 form or pay records)	
Total current amount in your checking and savings accounts: \$ _____	
Net worth of your investments: \$ _____	
UC Davis school code: 001313	

## step #4: Collect Contributor Documents



Collect all of the information and documents your contributor(s) need to submit.

If you're a dependent student, collect this info for your contributors (parent(s), guardian(s), spouse). If your parents are divorced/separated, include info about the parent who provides the majority of your financial support. If that parent is remarried, include your stepparent. ALL contributors must have an FSA ID.

General Information	Contributor 1	Contributor 2
FSA ID (username and password):		
Date of Birth		
Social Security Number or ITIN Number		
Email Address		

CONTRIBUTOR(S) TAX INFORMATION	Done?
<p>Give consent for the contributor's federal income tax return from tax year 2022 (including 1040 form and all schedules) to be pulled from the IRS by FAFSA.</p> <p>***If your contributor(s) received an extension for 2022, request they complete this soon to help with the process.</p>	
<p>If 2022 taxes were not filed, what was the reason? _____</p>	



CONTRIBUTOR(S) FINANCIAL INFORMATION	Done?
Total current amount in checking and savings account(s): \$ _____	
Net worth (value minus debt) of current stocks, bonds, mutual funds, 529 plans, etc.: \$ _____  ***Families with an AGI (Adjusted Gross Income) greater than \$60,000 will be required to report asset information.	
Net worth of investment/rental property/rented portion of your home: \$ _____	
Net worth of parent-owned business(es) and/or family farm(s): \$ _____  ***Net value of businesses and farms of ANY size is counted as an asset	
Amount of child support received in the past year for all children: \$ _____	
Federal benefits (SNAP, WIC, TANF, etc.) received in 2022 / 2023: \$ _____	

**The FAFSA is going through many changes, termed FAFSA Simplification. To learn more about these changes and how these can impact your financial aid, as well as to find our presentations with more information (both in English and Spanish), scan the QR code on the right:**

