FAFSA® Checklist

PHEAA

About the FAFSA

The FAFSA (Free Application for Federal Student Aid) is the first step in the financial aid process. It is used to apply for federal student aid, such as grants, loans, and work-study. In Pennsylvania, information from the FAFSA is also used to determine student eligibility for the PA State Grant.

The FAFSA asks for information about you and your financial situation. If you're married, you will need the same info for your spouse. If you're considered a dependent student, you will need your parents' information, too.

Before filing the FAFSA, gather the following items:

☐ A Federal Student Aid (FSA) ID

> **Note:** A FSA ID is a username and password used to log into U.S. Department of Education (USDE) websites and electronically sign the FAFSA. You and a parent will each need your own separate FSA ID.
>
> Go to **fsaid.ed.gov** to create your FSA ID.

☐ Social Security number

☐ Your driver's license number, if you have one (optional)

☐ Alien registration number, if you are not a U.S. citizen

☐ Email address (optional)

☐ 2018 W-2 Forms

☐ 2018 Records of untaxed income received, including workers' compensation, child support, payments to tax-deferred pension, savings plans, etc.

☐ 2018 Federal income tax return and applicable schedules

> **Note:** If you complete your FAFSA online, you have the option of automatically retrieving your income and tax data from the Internal Revenue Service (IRS) and having it transferred into your FAFSA. The IRS Data Retrieval Tool (DRT) is the preferred method to complete the FAFSA.

☐ Current bank statements and records of stocks, bonds, 529 plans, and other investments

Now you're ready... Visit **FAFSA.gov** to file for FREE!

Need Additional Help?

Need help with more than just the FAFSA? There are plenty of FREE resources available to help you with the financial aid process:

PHEAA.org | **StudentAid.ed.gov** | **collegecost.ed.gov**

PHEAA
Pennsylvania Higher Education Assistance Agency