

FAFSA INSTRUCTIONS



Step 1: Create an FSA ID for student

- Visit fsaid.ed.gov
- Fill out requested information, including SSN. Use **personal email**
- Check your phone & open your email to retrieve secure code
- Insert secure code into FSA ID portal
- “You can now use your FSA ID username and password to log into FSA website and applications” message will confirm you have created an account!

Step 2: Create a FSA ID for one parent

- Visit fsaid.ed.gov
- Fill out requested information. **If parent does not have a SSN, skip this step.**
- Open parent phone & email to receive secure code (####)
- Insert secure code into FSA ID portal
- “You can now use your FSA ID username and password to log into FSA website and applications” message will confirm you have created an account!

Step 3: Record all account information so you do not forget it

- You will use this information every year that you’re in college, so write it down, email it to yourself, or enter it as a note in your phone if possible!

Student FSA ID Username: _____

Student FSA ID Password: _____

Parent FSA ID Username: _____

Parent FSA ID Password: _____

Step 4: Gathering the Documents Needed to Apply

- **Social Security Number/Alien Registration number (for student and parent)**
 - If parent/guardian does not have one of these, the student is still eligible for aid! Just put 000-00-0000 in place of the SSN.
 - If student does not have one, see Mr. Medicott for further instructions on how to apply for aid.
- **Parent/Guardian W-2/Tax Return from 2020**
 - Student 2020 Tax Return (If applicable)
- **Student driver license number (if applicable)**
- **Will also need to know:**
 - The month & year of parents’ marriage/separation/divorce (if applicable)
 - Estimates of household investments, assets, and/or savings (if applicable)



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Step 5: Starting Your FAFSA and Providing Your Basic Personal Information

- Visit fafsa.ed.gov
- Select “Start New FAFSA”
- Select “2022-2023 FAFSA”
- Begin to fill out requested information, including the colleges that you wish to send your FAFSA to



Step 6: Reporting Parent's Information

- Questions about who to report under parent info? Ask Mr. Medlicott
- When you get to Parent Financial Information, utilize the IRS Data Retrieval Tool (DRT) If possible
 - If you have already filed taxes and are under an eligible filing status the option will appear to “Use IRS Data Retrieval Tool”.
 - Enter your FSA ID and click **Link to IRS**
 - Your FAFSA will be saved, and you will be transferred to the IRS website.
 - On the IRS website, enter the requested information exactly as it appears on your tax return (name and address must match the tax return)

Step 7: Student Financial Information

- If student filed a 2020 Tax Return, fill in the information as required
- If student did NOT file a 2020 Tax Return, then put all zeroes in response to the financial questions

Step 8: Sign and Submit the FAFSA

- Note: If both the student and the parent/guardian have a SSN, the form can be signed electronically using the FSA ID for each, and submitted online
- If parent/guardian does not have a SSN, you will have to mail in a printed out copy of the signature page. See Mr. Medlicott (turner98@live.unc.edu) for help.
- **Once the form is signed by both parents and the student, it is complete.**
 - It is a good idea to log back in and double check that everything has been submitted correctly and that there are no errors!

Remember: If you need help or are unsure about any of these steps or any of the questions on the FAFSA, contact Mr. Medlicott!



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