



FAFSA 2026-2027

KEY UPDATES FOR STUDENTS AND FAMILIES

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IN THIS PRESENTATION

DISCUSSION TOPICS

- Changes & Updates
- Why complete the FAFSA?
- FAFSA Timeline and Deadlines
- Navigating the FAFSA
- Completing the FAFSA: Parents
- Next Steps
- FAFSA Tips





CHANGES & UPDATES

NEW WITH THE 2026-2027



CHANGES & UPDATES

NEW LEGISLATION AFFECTING FINANCIAL AID

Federal government steps back in higher ed finance for the first time in 60 years.

Stated goals:

- Reduce taxpayer support from the expanding federal student loan portfolio
- Encourage universities to lower costs

“Taken together, the changes to student loans will save taxpayers \$307 billion over a decade, according to preliminary estimates from the Congressional Budget Office (CBO)*.”

[*American Enterprise Institute](#)



Elimination of Grad PLUS

Graduate and Professional Students

- Grad PLUS allowed graduate/professional students to borrow up to the full cost of attendance
- First launched in 2005, Grad PLUS will be eliminated July 1, 2026
- Those who borrow a Grad PLUS loan prior to July 1, 2026, may continue to take out Grad PLUS loans for the lesser of program completion or three years

Borrowing Caps for Parent PLUS

Annual and lifetime maximum caps imposed on Parents

EXISTING (2025/2026 Academic Year)

Parents of UG students can borrow up to the cost of attendance less other aid received

NEW IN 2026 (2026/2027 Academic Year)

Parent PLUS loans will be capped starting in July 2026 at \$20,000 annually, and \$65,000 total per child

Grad/Prof. Student Loan Borrowing Caps

Graduate and Professional Students

EXISTING (2025/2026 Academic Year)

- Grad and professional students – borrow up to \$20,500 per year with a cumulative lifetime cap of \$138,500 (inclusive of UG borrowing)
- Some medical degrees allow borrowing up to \$224,000

NEW IN 2026 (2026/2027 Academic Year)

- Grad students – borrow up to \$20,500 per year but cumulative lifetime cap reduced to \$100,000 (not including UG borrowing)
- Professional students – borrow up to \$50,000 per year with a cumulative cap of \$200,000 for professional degree and \$257,500 cap inclusive of UG borrowing

Repayment plans will be simplified

- Most current repayment options will be eliminated, including the SAVE and Pay As You Earn (PAYE) plans that adjust monthly bills based on income, and can lead to forgiveness after 20 or 25 years
- Borrowers will instead have two choices:
 - a fixed standard plan
 - or a new income-driven option called the Repayment Assistance Plan, which has a \$10 minimum monthly payment and forgives loans after 30 years of payments

Institutional accountability

If more than 50% of students who complete an educational program earn less than the median earnings of high school graduates (for undergraduate programs) or holders of Bachelor's degree (for graduate programs) in the state for 2 out of 3 years, students at that college will lose Federal Direct Loan eligibility for that program

Other items in OBBB with ripple effect

Medicaid cuts

- Given reduced federal funding to Medicaid, many states will be forced to reduce K-12 education, higher education, and other social services
- This will impact many public university systems and could lead to higher costs and less institutional aid

CHANGES & UPDATES

OBBB SUMMARY

- Elimination of Grad PLUS program
- Borrowing caps for parent PLUS program
- Borrowing caps for Grad/Prof program
- Simplified repayment plans
- Reduced funding for K-12, higher education, and some social services
- This may impact many public university systems and could lead to higher costs





WHY COMPLETE THE FAFSA?



WHY COMPLETE THE FAFSA?

APPLY & QUALIFY FOR FINANCIAL AID

★ Schools require FAFSA for financial aid.

■ Types of Financial Aid

○ Federal

- Direct Subsidized Loans
- Direct Unsubsidized Loans
- Work-Study
- Pell Grants
- TEACH Grants
- Federal Supplemental Educational Opportunity Grants (FSEOG)

○ State

- Grants and Scholarships

○ School

- School Loans
- Scholarships

RESOURCES

- www.studentaid.gov
- State Higher Education Commission
- Individual Colleges and Universities



FAFSA TIMELINE & DEADLINES

MAKE SURE YOU ARE PREPARED BEFORE
YOU GET STARTED.



FAFSA TIMELINE & DEADLINES

OVERVIEW

2025–26 FAFSA® Form

- Use this form to apply for college financial aid for 7/1/25–6/30/26.

2026–27 FAFSA® Form is Available Now!

- Apply for aid for 7/1/26–6/30/27 using this form.
- The 2026–27 FAFSA® form was available October 1, 2025.

Getting Started

- studentaid.gov/h/apply-for-aid/fafsa
- FAFSA PDF: [Resources](#) | [Federal Student Aid](#)

IMPORTANT NOTE

- ★ The 2026-2027 FAFSA will be available December 1, 2025.



FAFSA TIMELINE & DEADLINES

IMPORTANT DATES

Federal Deadline

- June 30th after the academic period aid is needed

State Deadline

- Varies with each state; Some states require additional forms

School Deadline

- Confirm with the school

Learn More

- studentaid.gov/apply-for-aid/fafsa/fafsa-deadlines

CORRECTIONS OR UPDATES

This includes:

- Add or delete schools
- Update financial information
- Correct mistakes



The deadline for corrections or updates is September after the academic period aid is needed.



NAVIGATING THE FAFSA

BEFORE – DURING – AFTER



BEFORE THE FAFSA

CREATE AN ACCOUNT (FSA ID)

Create An Account (FSA ID)

- studentaid.gov/fsa-id/create-account/launch

About Creating An Account

- All contributors to the FAFSA will need to create an account
 - Students – Parents – Anyone submitting info on the FAFSA
- Authenticated by the SSA – takes 1 -3 business days
- FSA ID does not expire – must be reset if locked or the user forgets the username or password

YOU WILL NEED AN FSA ID TO:

- Complete and renew the FAFSA
- Complete and electronically sign federal master promissory notes (MPN)
- Access all federal student aid websites
- Federal loan counseling
- Apply for repayment plans

DURING THE FAFSA

ACCOUNT LOGIN

Log into the FAFSA application

- Log in using individual FSA ID
- The FSA ID may be created at this point
- All contributors are required to have an individual FSA ID
 - Students
 - Biological or adoptive parent
 - Stepparent
 - Student's spouse
- A contributor is anyone required to provide information and approval to have their federal tax information transferred directly into the FAFSA form.

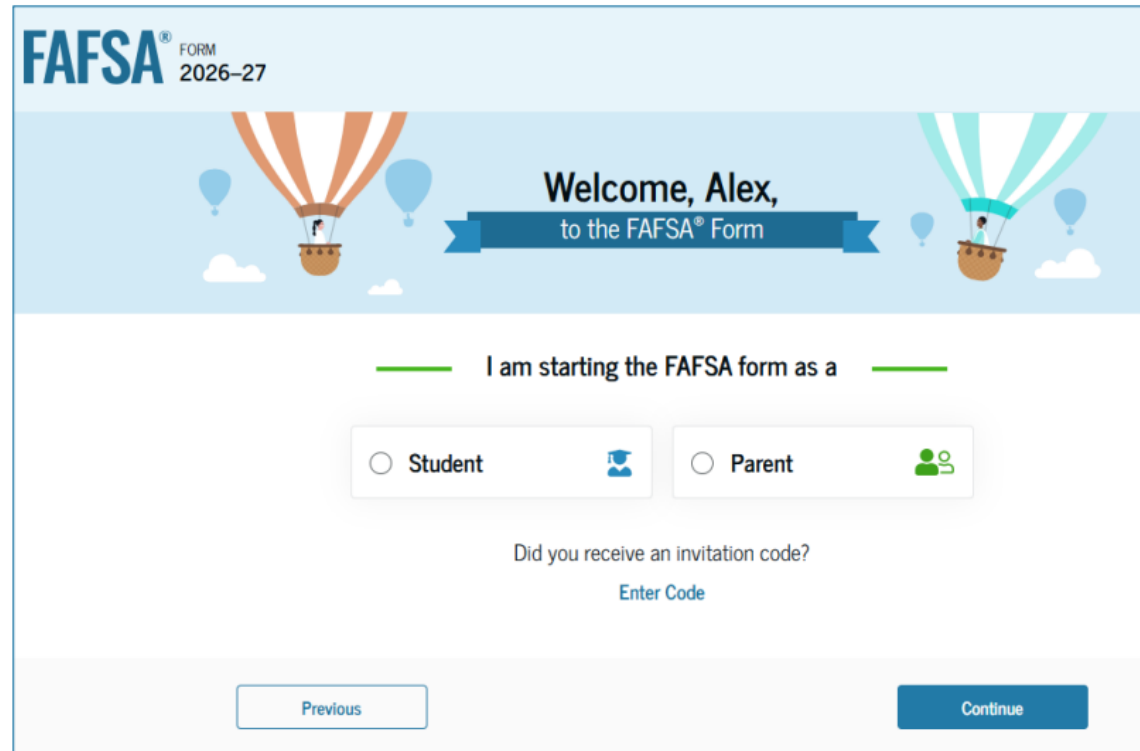
FAFSA® Application | Federal Student Aid

The screenshot shows the FAFSA application website. At the top, there's a navigation bar with 'FederalStudentAid' logo and links for 'FAFSA® Form', 'Grants and Loans', 'Loan Repayment', and 'Loan Forgiveness'. Below this is a main section titled 'Get Money To Help Pay for School' with a subtext explaining the FAFSA form. It features three buttons: 'Start a 2026–27 FAFSA® Form', 'Edit a 2026–27 FAFSA® Form', and 'Accept an Invitation for a 2026–27 FAFSA® Form'. To the right is a large 'FAFSA form' logo with an illustration of students. Below this, there's a section for 'Need the 2025–26 FAFSA Form?' with buttons for 'Start New Form' and 'Edit Existing Forms or Accept an Invitation'. Further down, a 'Check FAFSA® Deadlines for the State You Live in' section includes dropdowns for 'School Year' and 'State of Residence', a 'Find Deadlines' button, and a link to 'View All FAFSA Deadlines'. At the bottom, three informational cards are displayed: 'Who should complete the FAFSA® form?' (Any student, regardless of income, who), 'How long will it take?' (It takes most people 30 minutes to fill out the FAFSA form, including), and 'What do I need?' (Verified account username and password (FSA ID)).

DURING THE FAFSA

CHOOSING A ROLE

After logging in, the student can select the applicable role to fill out the FAFSA® form: "Student" or "Parent." The student also has the option to "Enter Code" if they received an invitation code. The student selects "Student."



The screenshot displays the FAFSA 2026-27 login interface. At the top left, the text "FAFSA® FORM 2026-27" is visible. The header features a light blue background with illustrations of hot air balloons. A central banner reads "Welcome, Alex, to the FAFSA® Form". Below this, a green line is followed by the text "I am starting the FAFSA form as a" and another green line. Two selection options are presented: "Student" with a blue graduation cap icon and "Parent" with a green family icon. Below these options, the text "Did you receive an invitation code?" is followed by a blue link labeled "Enter Code". At the bottom, there are two buttons: "Previous" and "Continue".

DURING THE FAFSA

STUDENT ONBOARDING

- **1 of 4** – overview of FAFSA and video
- **2 of 4** – Contributors to the FAFSA – explains different roles that may be required to participate in the student's FAFSA and documents needed
- **3 of 4** – What to expect - The third FAFSA® onboarding page provides information about the processing timeline and new requirements such as consent.
- **4 of 4** – The last FAFSA® onboarding page provides information about what to expect once the FAFSA form is completed and submitted. On this page, the student can select "Start the FAFSA form" to begin.

Understanding the FAFSA® Form

1 of 4

What is the FAFSA® form?

Use the *Free Application for Federal Student Aid* (FAFSA®) form to apply for grants, scholarships, work-study funds, and loans for college or graduate school.

FAFSA® Overview

A video thumbnail for 'FAFSA® Overview'. It features a woman in a pink shirt sitting in a wicker hot air balloon basket, floating against a background of stylized clouds and a sun with rays. The text 'FAFSA® Overview' is prominently displayed in the upper right, and a red YouTube play button icon is in the center. A small 'Federal Student Aid' logo is in the top left corner of the video frame.

DURING THE FAFSA

STUDENT IDENTITY INFO

Verify Personal Information

- Personal information pulled from existing studentaid.gov account

Updates Needed?

- Update personal information under Account Services on studentaid.gov
- Address may be updated directly within the FAFSA



To update this information for all federal student aid communications, go to **Account Settings**.

The screenshot shows the FAFSA 'Student Identity Information' form for the 2026-27 form year, for a student named Alex Tran. The form includes fields for Name, Date of Birth, Social Security Number, Email Address, Mobile Phone Number, Permanent Mailing Address, City, State, Zip Code, and Country. A 'Continue' button is at the bottom right. A note at the bottom of the form states: 'To update this information for all U.S. Department of Education communications, go to [Account Settings](#).'

FAFSA[®] FORM 2026-27 Student Alex Tran Save FAFSA Menu

Student Identity Information

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

Name
Alex Tran

Date of Birth
02/15/2006

Social Security Number
***-**-9036

Email Address
599889036test@testcoo.edu

Mobile Phone Number
(555) 557-6997

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

Permanent Mailing Address
Include apartment number.
324 dsfsd

City
dsfsd

State
IA

Zip Code
34343

Country ⓘ
United States (US)

Continue

DURING THE FAFSA

STUDENT PROVIDES CONSENT

This page informs the student about consent, approval, and the use of federal tax information. Once the student provides consent and approval, their federal tax information is transferred directly from the IRS into the FAFSA® form to help complete the "Your Finances" section.



The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. The page title is "Provide Consent and Approval or You Won't Be Eligible for Federal Student Aid". A green summary box contains the following text:

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 2024 tax return information for the 2026-27 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.

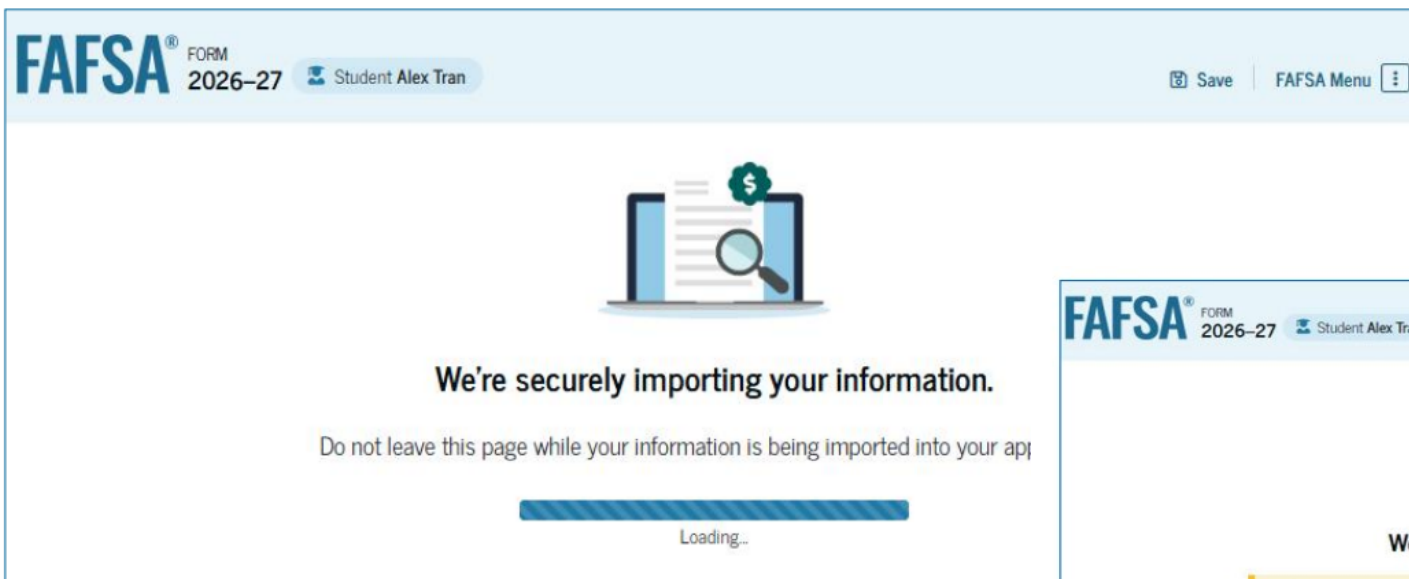
By accepting below, I consent to and affirmatively approve of, as applicable, the following:

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 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 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, for myself or an applicant for federal student aid who has requested that I share my federal tax information on their Free Application for Federal Student Aid (FAFSA®) form.

DURING THE FAFSA

IMPORTING TAX INFORMATION

This page imports the student's federal tax information by directly transferring it from the IRS into the FAFSA® form to help complete the "Your Finances" section.



FAFSA® FORM 2026-27 Student Alex Tran Save FAFSA Menu

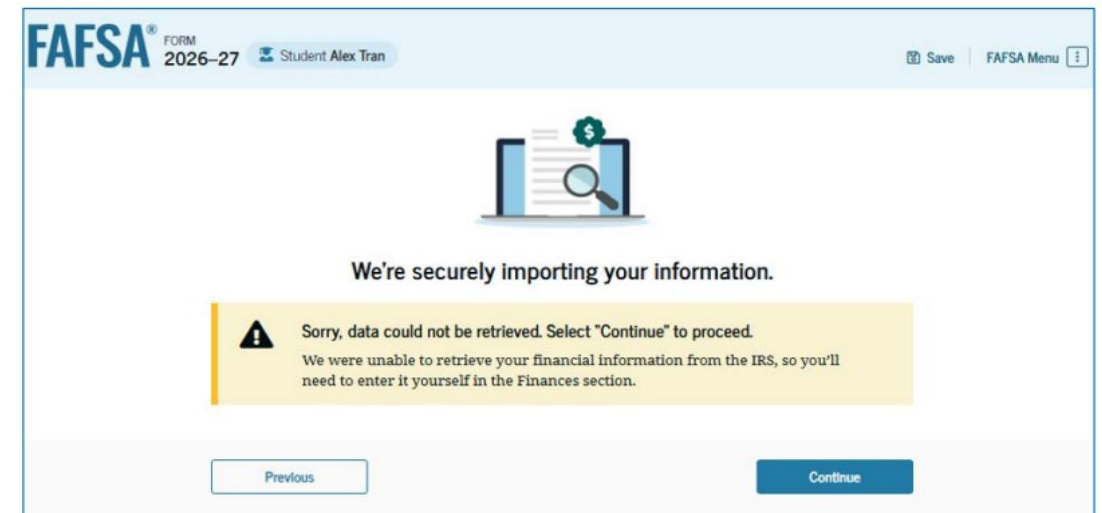


We're securely importing your information.

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



Loading...



FAFSA® FORM 2026-27 Student Alex Tran Save 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.

[Previous](#) [Continue](#)

DURING THE FAFSA

PERSONAL CIRCUMSTANCES

This section determines the student's dependency status.

A student's dependency status determines if they need to provide information about their parents or not.

Students will be determined to be one of the following:

- Dependent
- Independent
- Student with Special or Unusual Circumstance



Read about these different statuses on the following slides.

Your Personal Circumstances

Tell us about your marital status; your financial dependencies; your plans for college; and any other special circumstances that may impact your aid eligibility (including if you've been homeless or at risk of becoming so).

- This information can affect how much aid you're eligible to receive.
- Based on your answers, we may need to collect additional information from other people.



Previous

Continue

DURING THE FAFSA

PERSONAL CIRCUMSTANCES: DEPENDENT STUDENT

Dependent Student

- Based on the answers provided by the student they are considered a Dependent Student.



The student is required to provide information about their parents due to this status.

FAFSA[®] FORM 2026-27 Student Alex Tran Save FAFSA Menu

1 Personal Circumstances 2 Demographics 3 Financials 4 Colleges 5 Contributor Invite 6 Signature

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

Previous Continue

DURING THE FAFSA

PERSONAL CIRCUMSTANCES: INDEPENDENT STUDENT

Independent Student

- Based on the answers provided by the student (typically that they are married), they are considered an Independent Student.
 - Do not have to provide parent information
 - Student may sign and submit FAFSA
 - Student receives an estimate of financial aid

The student is NOT required to provide information about their parents due to this status.

The screenshot shows the FAFSA 2024-25 interface for a student named Raya Tran. The progress bar at the top indicates five steps: 1. Personal Circumstances (active), 2. Demographics, 3. Financials, 4. Colleges, and 5. Signature. The main heading is 'Your Dependency Status:'. Below this, a light blue box titled 'Independent Student' features an icon of a person and text stating: 'Based on your answers, you're a dependent student, you will report your own information (and, if you're married, your spouse's). This information is used to determine how much financial aid you're eligible to receive.' At the bottom of the screen, there are two buttons: 'Previous' and 'Continue'.

DURING THE FAFSA

PERSONAL CIRCUMSTANCES: SPECIAL OR UNUSUAL CIRCUMSTANCES

Student with Special or Unusual Circumstances

- Based on the answers provided by the student, they are considered **Provisionally Independent**
 - Do not have to provide parent information
 - Student may sign and submit FAFSA
 - Student receives an estimate of financial aid
 - Contact the school for supporting documentation
 - School will review and determine dependency override

The screenshot displays the FAFSA 2024-25 application interface for a student named Raya Tran. The top navigation bar includes the FAFSA logo, the form year (2024-25), the student's name, a 'Save' button, and a 'FAFSA Menu' button. A progress indicator shows five steps: 1. Personal Circumstances (active), 2. Demographics, 3. Financials, 4. Colleges, and 5. Signature. The main content area is titled 'Your Dependency Status' and features a light blue box with an icon of a student. The text in the box states: 'Provisionally Independent Student. Based on your answers, you're a provisionally independent student. This means you don't need to answer questions about your parents to submit your application. To complete your application, you'll need to contact your school's financial aid office and provide documentation to verify your circumstances. We won't be able to calculate your Student Aid Index (SAI) until you confirm your circumstances with your financial aid office. Until then, we will provide only an estimate of your federal student aid eligibility as an independent student.' At the bottom of the interface are 'Previous' and 'Continue' buttons.

DURING THE FAFSA

STUDENT DEMOGRAPHICS

- Race and ethnicity
- Gender
- Citizenship
- Parents education
- Parent killed in active duty
- Student's high school information

Student Demographics

We'll ask questions about you and your parent(s). Some of these questions will help determine how much federal student aid you may be eligible to receive for school.



Previous

Continue

DURING THE FAFSA

STUDENT FINANCIALS

What you'll need:

- 2024 Tax Return Info
- Info on investments, real estate, and other assets

Your Finances

The FAFSA form helps schools determine your ability to pay for college without financial aid, so we ask in this section if you receive any federal or state entitlement benefits and if you have any investments, real estates, or other assets.



[Previous](#)

[Continue](#)

DURING THE FAFSA

STUDENT SELECTS COLLEGES

List up to 20 schools

- Search by city, state, or school name
- Students should list **any school** they are interested in
- Review school details
- Can include colleges and career schools



Schools listed will receive FAFSA information.

Your Colleges

In this section, you'll search for and select schools you're considering so they will automatically receive an electronic copy of your FAFSA form. You don't need to worry if you don't end up applying to them - there is nothing else you need to do.



Continue

FAFSA[®] FORM 2026-27 Student Alex Tran Save FAFSA Menu

Personal Circumstances

Demographics

Financials

4 Colleges

5 Contributor Invite

6 Signature

Where should we send the FAFSA[®] information?

Add at least one college or career school now.

You can add or remove schools before and after submitting your form.

You can add up to 20 schools. List any schools you're considering, even if you're not certain you'll apply to them. [Find tips for searching for colleges or career schools.](#)

0 out of 20 schools selected View Selected Schools

Search by State Enter School Code

California (CA)

Search

Previous

Continue

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DURING THE FAFSA

STUDENT INVITES PARENT

Dependent Student: Parent Information and Invitation

- The student is asked to enter personal information about their parents in order to send them an invite to their FAFSA® form. In this scenario, the student invites one parent.

The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. A progress bar at the top indicates the following steps: Personal Circumstances (checked), Demographics (checked), Financials (checked), Colleges (checked), Contributor Invite (active, step 5), and Signature (step 6). The main heading is 'Invite a Parent as a Contributor'. Below this, a text box explains: 'A contributor is anyone who's required to provide information on your FAFSA form. You must invite a legal parent—a biological or adoptive parent as determined by the state. Stepparents and other types of guardians do not count unless they have legally adopted the student.' To the right of the text is an illustration of a man and a woman sitting on a bench. At the bottom, there is a question 'Who counts as a parent on the FAFSA form?' and two buttons: 'Previous' and 'Continue'.

'PARENT' CAN MEAN:

- **Legal** – biological or adoptive
- **Divorced** – parent who provides most financial support
- **Divorced and living together** – must include both
- **Stepparents** are included



Learn more about filling out the parent portion of the FAFSA in the next section.

DURING THE FAFSA

PARENT INVITATION CONFIRMATION

This page confirms the student's parent will receive an email inviting them to the student's FAFSA® form. The parent can access the form by accepting the invitation in the email. On this page, the student is also provided an invitation link and invitation code that can be shared directly with the parent.

The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. At the top, a progress bar indicates the following steps: Personal Circumstances, Demographics, Financials, Colleges, Contributor Invite (current step, marked with a blue circle and checkmark), and Signature. The main heading is "Parent Contributor". Below this, a green box contains the text: "Once your parent accepts the invitation, they can complete the parent section of this FAFSA form." Below that, a note states: "They may be asked to invite their spouse as a contributor too. You can check the status of contributor invitations from the 'My Activity' page." A modal window is displayed in the center, titled "Parent" with a green person icon. It shows the email address "599887939test@testcod.edu" and a button labeled "Invite Sent" with a checkmark icon. Below this, a link "Other Ways to Send the Invite" is followed by a section titled "Copy and Send the Invite Link" with a help icon. This section displays the URL "www.fafsa.gov/invite/7NDNUKA" and a "Copy Link" button. Below the URL, it says "You can also have them go to www.fafsa.gov/invite and enter code: 7NDNUKA". At the bottom of the modal is a "Cancel Invite" button.

DURING THE FAFSA

STUDENT REVIEW PAGE

Review what you have entered so far!

- Be thorough – avoid needing to make updates
- Check spelling carefully
- Check your contact information
- Ensure you've invited your parent (if applicable)

A screenshot of the FAFSA 2026-27 Student Review page. The page is titled "Continue To Sign Your Form" and includes a summary of the information provided. It lists sections that have been completed with green checkmarks: Introduction, Personal Identifiers, Section 1, Personal Circumstances, Section 2, Demographics, Section 3, Financials, and Section 4, Colleges. There is also a section for Contributors, showing one contributor (Parent) with an invite code and a status of "Invited". The page has a "Previous" button and a "Continue" button at the bottom.

DURING THE FAFSA

STUDENT SIGNATURE

- The student acknowledges the terms and conditions of the FAFSA® form and signs their section.
- After agreeing and signing, the student may submit their section of the FAFSA form.

Dependent Students

- If a Dependent Student is applying with a parent, the FAFSA form is not considered complete and can't be processed until the parent portion is also completed, signed, and submitted.

FAFSA® FORM 2026-27 Student Alex Tran Save FAFSA Menu

Personal Circumstances Demographics Financials Colleges Contributor Invite **Signature**

Sign and Complete Your Section ①

Summary

FAFSA® FORM 2026-27 Student Alex Tran Save FAFSA Menu

Student Section Parent Section

Pending Submission
Check With Your Contributor

Parent Contributors

Requirements for Dependent Students
Your FAFSA® form can't be submitted until your contributor(s) fill out their section of the form and sign it. The last contributor to sign will be able to submit the form for processing.

Contributor(s)	Role	Invite Code	Status
599887939test@testcodedu	Parent	7N0NUKA	Invite Sent

[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](#)



COMPLETING THE FAFSA: PARENTS

WHAT TO EXPECT AS A PARENT
CONTRIBUTOR



COMPLETING THE FAFSA: PARENTS

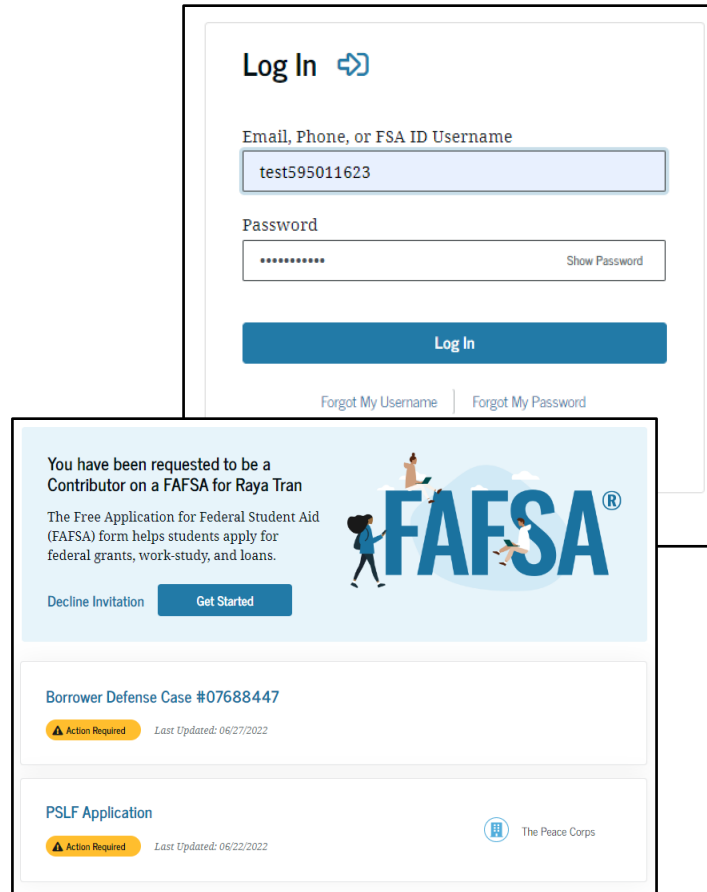
ACCOUNT LOGIN

Log into the FAFSA application

- To access the FAFSA, all parents are required to have an FSA ID. If the parent doesn't have one, they can select "Create an Account."

Activity Page

- Once logged in, the parent can select the applicable invitation to the application that they want to complete.



The image shows two screenshots of the FAFSA application interface. The top screenshot is the login page, titled "Log In" with a right-pointing arrow icon. It features a text input field for "Email, Phone, or FSA ID Username" containing the text "test595011623", a password input field with masked characters and a "Show Password" link, and a blue "Log In" button. Below the button are links for "Forgot My Username" and "Forgot My Password". The bottom screenshot is the activity page, titled "You have been requested to be a Contributor on a FAFSA for Raya Tran". It includes a brief description of the FAFSA form, a "Decline Invitation" link, and a blue "Get Started" button. Below this, there are two sections: "Borrower Defense Case #07688447" with an "Action Required" badge and "Last Updated: 06/27/2022", and "PSLF Application" with an "Action Required" badge and "Last Updated: 06/22/2022". The FAFSA logo is prominently displayed in the center of the activity page.

GETTING STARTED AS A PARENT

- Parent receives email invite with a link to the FAFSA app
- Parent required to have FSA ID to complete FAFSA
- Parent visits activity page once logged in
- Parent sees an invitation to be a contributor

COMPLETING THE FAFSA: PARENTS

PARENT ONBOARDING

- **1 of 4** – overview of FAFSA and video
- **2 of 4** – Contributors to the FAFSA – explains different roles that may be required to participate in the student's FAFSA and documents needed
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Understanding the FAFSA® Form

1 of 4

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COMPLETING THE FAFSA: PARENTS

PARENT IDENTITY INFO

Verify Personal Information

- Personal information pulled from existing studentaid.gov account

Updates Needed?

- Update personal information under Account Services on studentaid.gov
- Address may be updated directly withing the FAFSA



To update this information for all federal student aid communications, go to **Account Settings**.

Parent Identity Information

Review the information below and verify that it

Name

Alcina Tran

Date of Birth

05/05/1973

Social Security Number

...-...-1234

Email Address

alcinatan@schoool.edu

Mobile Phone Number

(555) 555-5555

COMPLETING THE FAFSA: PARENTS

PARENT PROVIDES CONSENT

★ NEW FOR 2026/2027

Must be signed by all parties (students and parents, if applicable) in order for the FAFSA to be submitted!

- This page informs the parent about consent and their federal tax information. By providing consent, the parent's federal tax information is transferred directly into the FAFSA® form from the IRS to help complete the Parent Financials section. The parent selects "Approve" to provide consent and is taken to the next page.

Provide Consent or the Student Will Be Ineligible for Federal Student Aid

Summary

Your consent is needed to retrieve and disclose federal tax information (FTI). With your consent, 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, the student will not be eligible for federal student aid, including grants and loans. You must provide consent even if you didn't file a U.S. federal tax return or any tax return at all.

- Get your 2022 tax return information for the 2024–25 FAFSA form.
- Tax return information is required to complete the FAFSA form.
- FTI is used to determine the student's eligibility for federal student aid.

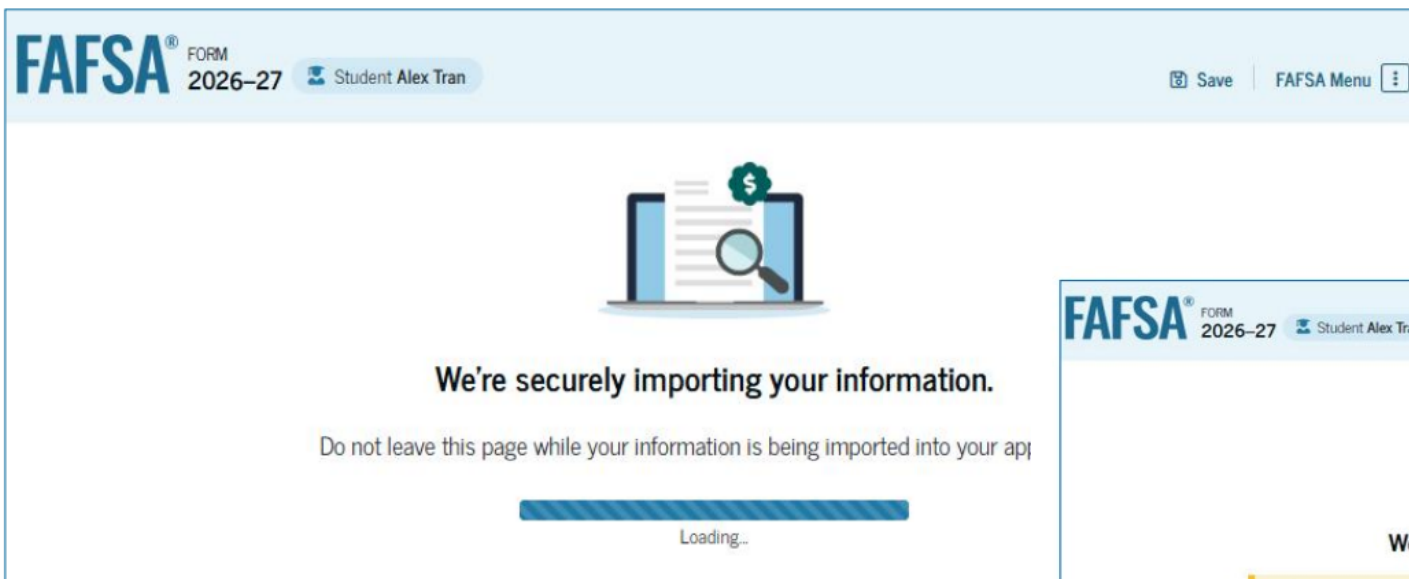
Under penalty of law, I certify that I am the individual associated with the FSA ID log-in credentials used to access the FAFSA form to provide the necessary approval and consent for the disclosure and use of my federal tax information (FTI) from the U.S. Department of the Treasury. By accepting below, I approve and consent to:

- The U.S. Department of Education to disclose my Social Security number, last name, and date of birth to the U.S. Department of the Treasury in order to obtain my FTI only for the purpose of determining the eligibility for, and the amount of, federal student aid for myself or of others for which I participated and shared my FTI by 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.
- The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 6103(i)(13)), only for the purpose of determining the eligibility for, and amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program authorized under Title IV of the *Higher Education Act of 1965*, as amended.
- The U.S. Department of Education to redisclose my FTI received from the U.S. Department of the Treasury; pursuant to 26 U.S.C. 6103(i)(13)(D)(iii), which includes:
 - institutions of higher education participating in the federal student aid programs authorized under the *Higher Education Act of 1965*, as amended;
 - state higher education agencies; and
 - scholarship organizations designated prior to Dec. 19, 2019, by the Secretary of Education.

DURING THE FAFSA

IMPORTING TAX INFORMATION

This page imports the student's federal tax information by directly transferring it from the IRS into the FAFSA® form to help complete the "Your Finances" section.



FAFSA® FORM 2026-27 Student Alex Tran Save FAFSA Menu

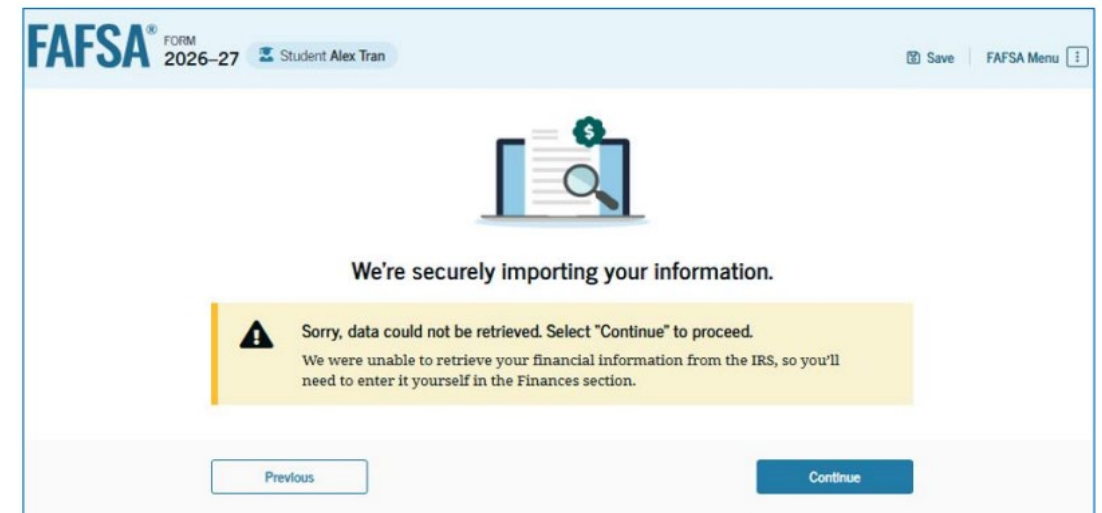


We're securely importing your information.

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



Loading...



FAFSA® FORM 2026-27 Student Alex Tran Save 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.

[Previous](#) [Continue](#)

COMPLETING THE FAFSA: PARENTS

PARENT DEMOGRAPHICS

- Marital status
- College students in home
- State of legal residency

Demographics About You

We'll ask about your marital status, college students in your household, and legal residence.

→ This is because most dependent students receive support from their parents, and this affects how much they're able to pay for school.



[Previous](#)

[Continue](#)

COMPLETING THE FAFSA: PARENTS

PARENT FINANCIALS

- Federal benefits received
- Tax filing status
- Family size
- Number in college
- Tax return information
- Assets
- Other parent (spouse) information

Your Finances

The FAFSA form helps schools determine the student's ability to pay for college without financial aid, so we ask in this section if you receive any federal or state entitlement benefits and if you have any investments, real estates, or other assets.

[Previous](#)[Continue](#)

COMPLETING THE FAFSA: PARENTS

PARENT REVIEW PAGE

Review Topics:

- Displays parent(s) responses
- Displays student responses
- Parent(s) can view responses by selecting "Expand All"
- To edit a response, the parent can select the question's hyperlink

Take a moment to review before signing

Expand the sections below to review and edit the information you've entered before you sign your portion of the form.



Parent Contributor Sections Expand All ▾

- ☒ Introduction
Personal Identifiers ▾
- ☒ Section 1
Demographics ▾
- ☒ Section 2
Financials ▾
- ☐ Section 3
Signature ▾



[Previous](#) [Continue](#)

COMPLETING THE FAFSA: PARENTS

PARENT SIGNATURE

- On this page, the parent acknowledges the terms and conditions of the FAFSA® form and signs their section.
- Since all required sections are complete, the parent can both sign and submit the student's FAFSA form.

Sign and Complete Your Section

Summary

This page confirms that you understand the terms and conditions of the FAFSA® form and filled out the form accurately to the best of your ability.

The FAFSA form is a legal document you will electronically sign with your 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 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 the information reported on your

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.

Sign for yourself and submit the application for Raya Tran (Student).

☒ I, Alcina Tran, agree to the terms outlined above.

Cancel

Sign and Submit

COMPLETING THE FAFSA: PARENTS

FAFSA CONFIRMATION

CONGRATULATIONS! YOU DID IT!!

Student receives an email with the full detailed confirmation.

- **Confirmation page displays:**
 - Tracking the students FAFSA form
 - Next steps



FAFSA form is now considered complete and submitted for processing.

The screenshot shows the FAFSA confirmation page for Alex Tran. The header includes the FAFSA logo, the form year (2026-27), and the user's role (Parent of Alex Tran). The main heading reads "Congratulations, the FAFSA Form Is Complete!". Below this, the student's name "Alex Tran" is displayed, along with the completion date "07/17/2025". The page is divided into two main sections: "What Happens Next" and "Track and Manage the Student's FAFSA Form".

What Happens Next

- Email Sent**
Confirm that the student received an email version of this page.
- The Student Can Track the Status of Their Form**
In one to three days, the student's FAFSA form will be processed and made available to their schools.
- The Student Will Receive School Communications**
We use the information collected on the student's FAFSA form to calculate their Student Aid Index (SAI). The SAI lets schools determine how much aid the student is eligible to receive. Schools will reach out to the student if they need more information. They will also contact the student with financial aid offers. Once received, the student can contact their financial aid offices directly to ask questions about their student aid packages.

Track and Manage the Student's FAFSA Form
You can check the status of the student's application in the "My Activity" section of your account Dashboard. We will let you know if we need anything more from you.

[View Status](#)



NEXT STEPS

WHAT HAPPENS AFTER I COMPLETE THE FAFSA?



NEXT STEPS

FAFSA SUBMISSION SUMMARY

Formerly known as the student aid report (SAR)

- Summary of FAFSA information
- Student Aid Index (SAI)
- Data release number (DRN)
- FAFSA verification
- Make corrections if necessary
- Visit aid summary
- Visit college scorecard

The screenshot shows the FAFSA Submission Summary page. At the top left is a '< Back' link. At the top right is a 'Print FAFSA Submission Summary' link. The main header displays the FAFSA logo, 'FORM 2026-27', and 'FAFSA Submission Summary'. Below this is a light blue box containing student information: 'Student Michelle Allen', 'Application Received June 20, 2025', 'Application Processed June 20, 2025', 'Data Release Number 8720', and 'Viewing: Submission 1'. At the bottom is a navigation bar with four tabs: 'Eligibility Overview' (which is underlined), 'FAFSA Form Answers', 'School Information', and 'Next Steps' (which has a blue circle icon).

WHAT HAPPENS NEXT?

Student receives a link to their **FAFSA Submission Summary** via email. This includes:

- Eligibility overview
- FAFSA form answers
- School information
- Next steps



FAFSA TIPS

REMINDERS TO HELP YOU COMPLETE THE
FAFSA



FAFSA TIPS

REMINDERS AND RESOURCES

Complete the FAFSA **each year** enrolled in college

Schedule FAFSA time

Understand deadlines
and **apply early**

Create an account at
studentaid.gov

FSA ID

[Help Center for
Federal Student Aid](#)

**Review FAFSA
Submission Summary:**

Make corrections
FAFSA verification

Tax info: All contributors
must provide consent and
approval on the FAFSA
form

Follow-up with all
communication from the
Department of Education
and Schools



Tricia Poplicean

- College Counselor
- CU Student Choice



Please contact us with any additional questions:
scholarhelp@studentchoice.org

THANK YOU FOR ATTENDING!

CONTACT US IF YOU NEED MORE HELP.

