



# FAFSA Tips and FAQ's



# Create A FSA (Federal Student Aid) ID

## fsaid.ed.gov

The FSA ID and Password allows you to sign into the FAFSA site to start, continue and review your information.

This is the first step to complete your FAFSA.

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### Create a New FSA ID

An FSA ID is a username and password that gives you access to Federal Student Aid's online systems and can serve as your legal signature.

Only create an FSA ID using your own personal information and for your own exclusive use. You are not authorized to create an FSA ID on behalf of someone else, including a family member.

You are not allowed to have an employee or agent of a commercial entity, or other third party, create an FSA ID for you for any purposes including but not limited to: payment reductions, debt consolidation or applying for aid. Misrepresentation of your identity to the federal government could result in criminal or civil penalties.

*Important: When you are done, select the CANCEL button to clear your data even if you did not finish creating your FSA ID. Just closing your browser window or going to another website may not be enough to prevent other people using this computer from seeing your information until the session expires.*

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Create an FSA ID | Manage My FSA ID

Create your FSA ID username and password below.

Username

Password

Numbers  Uppercase Letters  Lowercase Letters  8-30 Characters  Show Text

Confirm Password

**CONTINUE**

# FAFSA

[www.fafsa.gov](http://www.fafsa.gov)

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UNDERSTAND AID ▾

APPLY FOR AID ▾

COMPLETE AID PROCESS ▾

MANAGE LOANS ▾

## Complete the FAFSA<sup>®</sup> Form

Use the *Free Application for Federal Student Aid* (FAFSA<sup>®</sup>) form to apply for financial aid for college or graduate school.

### New to the FAFSA<sup>®</sup> Process?

Completing the FAFSA form is free. Fill it out now.

[Start Here](#)

### Returning User?

[Correct info](#) | [Add a school](#)

[View your \*Student Aid Report\* \(SAR\)](#)

[Log In](#)

# Documents needed to complete your FAFSA.

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FSA ID + PASSWORD	2018 TAX RETURN (DATA CAN BE IMPORTED DIRECTLY MOST OFTEN)
2019 W-2's	STATE ID OR DRIVER'S LICENSE NUMBER
UNTAXED INCOME RECEIVED FOR 2019 (interest income, child support received, veteran non- education benefits)	BANK/ASSET CURRENT BALANCE <small>*exclude retirement account + home equity if you are a homeowner living in your primary residence</small>
SOCIAL SECURITY NUMBER <small>*your name + SSN must match on your social security card</small>	UC BERKELEY SCHOOL CODE 001213

# SIMPLE STEPS TO TRANSFER TAX INFORMATION INTO YOUR FAFSA® FORM

The IRS Data Retrieval Tool (IRS DRT) Electronically Transfers Your Federal Tax Return Information Into Your FAFSA® Form

## WHY

**EASY** Transfer info with the click of a button.

**FAST** Instantly retrieve your information.

**ACCURATE** Correctly fill in your information.

## HOW



**1** Log in to your current FAFSA® form or start a new application at [fafsa.gov](http://fafsa.gov).

**2** In the finances section of the online form, you will see a "Link to IRS" button if you are eligible to use the IRS DRT.

**3** Click the "Link to IRS" button and log in with your FSA ID to be transferred to the IRS to retrieve your info.

**4** Once at the IRS site, enter your information exactly as it appears on your federal income tax return and click the "Submit" button.

**5** Check the "Transfer My Tax Information into the FAFSA® form" box, and click the "Transfer Now" button.\*

**6** You will know that your federal tax return information has been successfully transferred because the words "Transferred from the IRS" will display in place of the IRS information in your FAFSA® form.

\*For your protection, your tax information will not be displayed on either the IRS site or [fafsa.gov](http://fafsa.gov).

The IRS DRT can be used by both students and parents.

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To learn more about the IRS DRT, visit [StudentAid.gov/irsdrt](http://StudentAid.gov/irsdrt)

# FREQUENTLY ASKED QUESTIONS

<p>Q: I don't want any loans, why do I need to fill this out?</p> <p>A: The 2020-2021 FAFSA is being used to identify students who may be eligible for CARES funding. While you may be offered loans in the coming academic year, you are not obligated to accept them. If you are offered CARES funds they will be prioritized over any loan offer.</p>	<p>Q: Do I need to include my parent information?</p> <p>A: No, parent information is not required as a graduate student.</p> <p>*optometry students who wish to be considered for a Health Professional Student Loan may opt in parent data</p>
<p>Q: Can I change my information once I submit my FAFSA</p> <p>A: Yes, you may log in at any time to update your information, you will need your FSA login and PIN to access your FAFSA</p>	<p>Q: My 2018 tax information financially different from my current financial information, can I update it?</p> <p>A: If your income has changed, you can submit an expected family contribution (EFC) appeal for the 20-21 school year. Please review the <a href="#">EFC Appeal flyer</a> for more information about how to submit an appeal and what types of documentation is needed.</p>
<p>Q: How do I report my department stipend as work study?</p> <p>A: No, any compensation from department stipends are part of your wages from your W2</p>	<p>Q: What is verification?</p> <p>A: The Department of Education does select students at random to submit documentation to support the FAFSA information you provided. If you are selected, you will receive a notification from FASO that will advise what you will need to submit.</p>
<p>Q: What is selective service and do I have to Register?</p> <p>A The Department of Education requires students who were assigned male at birth and are 18-25 years of age to be registered with the Selective Service. The US at present has no draft in place. More information can be found here: <a href="https://www.finaid.org/students/selectiveservice.phtml">https://www.finaid.org/students/selectiveservice.phtml</a></p>	<p>Q: I need additional help on the FAFSA who can I contact?</p> <p>A: Fafsa.gov or 1-800-fed-aid (1-800-43303243)</p>