

Better FAFSA Training Scenarios

Instructions: Use these scenarios for discussions about what questions you may need to ask to advise students on completing the Better FAFSA. Advice may vary depending on answers to chosen questions.

- A. Student Amy wants to file her FAFSA. Her parents are divorced, and neither is remarried. Amy was living with her father until two weeks ago. He took a job in a different city, and Amy has moved in with her mother and will live there until she graduates from high school. There is no formal child support arrangement because Amy had lived with her father since the divorce. Which parent should Amy include in the FAFSA? What is the rationale?
- B. Student Jose is ready to file his FAFSA. Jose is a US citizen, but his parents are undocumented. His parents do not have ITINs. Each parent has attempted to set up an FSA ID via the new system for those without Social Security Numbers (SSNs). His father was successful, but his mother could not establish an FSA ID with the online process. Jose has a FAFSA priority deadline in three days. What steps should Jose and his parents take to get the FAFSA submitted by the deadline? What is the rationale?
- C. Student Mohammed wants to file his FAFSA. He cannot convince his parents to provide consent for the IRS to share their federal tax information for his FAFSA. They manually enter their income information and then submit the form. Mohammed's college receives his rejected FAFSA and notifies him that he is not eligible for federal financial aid unless his parents consent to transfer their tax information is received. Upon receiving this news, his father agrees to provide consent for their joint tax return. What steps should Mohammed and his parents take to grant consent on the FAFSA?
- D. Student Takisha is in the process of filling out her FAFSA. She is a dependent student, and her parents filed a joint tax return for 2022. The form requires her to fill in parent information to invite them to contribute to her FAFSA form. The fields required are her parent's legal name, social security number, date of birth, and email address. She fills in the information for her mother, but her mother does not receive an invitation to provide information in Takisha's FAFSA. What could be the reasons that her mother did not receive the invitation? How could Takisha fix the situation so that her mother gets the invitation?
- E. A college access advisor assists Student Jeremy and his mother at a FAFSA workshop. Jeremy's mother and father have been separated for a year. While attempting to answer the Parent Wizard questions for separated parents, the mother indicates that each parent provides an equal amount of financial support for Jeremy, and their shared custody arrangement means that Jeremy lives an equal amount of time with each parent. How should the access advisor guide them in completing the FAFSA? What types of questions might the advisor ask to determine which parent's financial information belongs on the FAFSA? What is the rationale?

- F. Student Sarah is dependent and lives with both biological parents, who live together but are not married. Sarah's parents do not file taxes because their income is below the tax filing threshold. How many FSA IDs must be set up so Sarah can file her FAFSA? What is the rationale?
- G. Student Caleb is working on his section of the FAFSA. He correctly invites his father to be the contributor for his parent's joint tax return. Caleb's parents combined adjusted gross income is \$46,000, but they have not completed their section of the FAFSA yet. While completing his section, Caleb is required to answer the student asset questions. Why does Caleb see those questions? Will any assets he reports be taken into consideration when calculating his Student Aid Index (SAI)? What is the rationale?
- H. Student Bryn has finished the student section of the FAFSA and now has to complete the parent section. Her biological parents divorced a few years ago, and she lives with her mother and stepfather, who married in February 2023. In 2022, her mother and stepfather did not file their taxes together. What will the process be to enter the parent income information on the FAFSA?
- I. Student Aminah and her mother come in to complete the FAFSA but realize neither has created an FSA ID yet. They spent the first half of the meeting setting up their FSA IDs. Will Aminah be able to start the FAFSA today? If so, are there any limitations to completing the FAFSA, and how should they navigate those limitations?
- J. Student Isaak is starting his FAFSA when he shares that he has two new siblings born in June 2023. What concerns does this raise about using household size based on 2022 tax forms? What questions could you ask Isaak to get an accurate household size? How can you ensure the right household size is reported?
- K. Student Jamar has parents that have been separated for almost two years. Jamar lives with his father. Jamar's two younger siblings also live in the household. The father claims all the children on his federal tax return. Jamar's parents' tax filing status for the last two years has been married filing jointly since they have not officially divorced. How would the family determine which parent provides the most financial support? How should Jamar determine the family size to be reported?
- L. Student Maria has continual spats with her parents about household rules. She remains living at home as the disagreements are not putting her in harm's way. Their most recent spat was yesterday, and Maria begins to fill out her FAFSA today. Because Maria is mad at her parents right now, she indicates that she has "unusual" circumstances and will not provide her parents' financial information. Maria's college receives her "provisional independent student" FAFSA and sends a request for follow up information. Maria realizes that she does not really qualify for unusual circumstances and her parents agree to completing their portion of the FAFSA. What steps should Maria take to update her FAFSA and provide parental information?