

Completing the FAFSA[®] 2017–18

Free Application for Federal Student Aid

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Introduction

This document provides information to help you complete and submit the 2017–18 *Free Application for Federal Student Aid* (FAFSA[®]). It provides a brief overview of the FAFSA and the financial aid application process. Then, it lists the help and hints that are provided for each question of the FAFSA.

Throughout this document, “you” and “your” refer to the student. “School” refers to the college, career school, or postsecondary institution the student is attending (or applying to).

What is the FAFSA?

The FAFSA is the application you will use to apply for federal student aid programs offered by the U.S. Department of Education (ED). Completing and submitting the FAFSA is free and easier than ever, and it gives you access to the largest source of financial aid to help pay for college or career school. Federal student aid covers such expenses as tuition and fees, room and board, books and supplies, transportation, and other related expenses, such as a computer and dependent care. In addition, many states and colleges use your FAFSA data to determine your eligibility for state aid and school aid, and some private financial aid providers may use your FAFSA information to determine whether you qualify for their aid.

ED awards more than \$150 billion a year in federal student aid (grants, work-study funds, and loans). Learn more at [StudentAid.gov/types](https://studentaid.gov/types).

Two Important Changes for the 2017–18 FAFSA

For the 2017–18 FAFSA, there are two important changes:

- **You will be able to submit a FAFSA earlier.** You will be able to file a 2017–18 FAFSA as early as Oct. 1, 2016, rather than beginning on Jan. 1, 2017. The earlier submission date will be a permanent change.
- **You will provide older income and tax information.** Beginning with the 2017–18 FAFSA, you will be required to report income and tax information from an earlier tax year. On the 2017–18 FAFSA, students (and parents, as appropriate) will report their 2015 income information, rather than their 2016 income information. This change makes it easier to complete your FAFSA. Since you and/or your parents will have already filed your taxes, you can electronically import your tax information directly into the FAFSA using the IRS Data Retrieval Tool. Note: If your family’s financial situation changed since your 2015 taxes were filed, you will still need to provide 2015 tax information. Then, you can contact the financial aid office at the school you plan to attend and let them know your situation has changed. They have the ability to review your situation and consider making adjustments to your FAFSA.

You can get additional details about the two changes at [StudentAid.gov/resources#17-18-changes](https://studentaid.gov/resources#17-18-changes).

How do I complete the FAFSA?

Almost all students and families complete the FAFSA online at fafsa.gov. We recommend completing the FAFSA online because

- fafsa.gov has built-in help to guide you through the application process;
- fafsa.gov uses “skip logic” that allows you to skip questions that don’t apply to you; and
- the schools you list on your FAFSA will receive your processed information faster.

In addition to the online form, you have two other options for completing the FAFSA:

- You can download and complete a PDF FAFSA (go to fafsa.gov and scroll to FAFSA Filing Options).
- You can order and complete a paper version of the PDF FAFSA (you may request up to three copies of the PDF FAFSA by calling 1-800-4-FED-AID [1-800-433-3243]).

In some cases, you might be able to apply directly through your school. You can check with the financial aid office at the school you are interested in attending to see if the school can assist you with your application. Some schools use special software to submit your FAFSA for you.

When do I submit my FAFSA?

The 2017–18 FAFSA is available earlier than in previous years. For the 2017–18 academic year (July 1, 2017, to June 30, 2018), you can file your FAFSA as early as Oct. 1, 2016. The earlier submission date will be a permanent change, and you will be able to complete and submit a FAFSA as early as Oct. 1 every year. The following table provides a summary of the key dates for submitting the FAFSA depending on when you plan to go to school.

If you plan to attend college from	You will submit this FAFSA	You can submit the FAFSA from	Using income and tax info from
July 1, 2016–June 30, 2017	2016–17	Jan. 1, 2016–June 30, 2017	2015
July 1, 2017–June 30, 2018	2017–18	Oct. 1, 2016–June 30, 2018	2015
July 1, 2018–June 30, 2019	2018–19	Oct. 1, 2017–June 30, 2019	2016

Note: Keep in mind that while the 2017–18 FAFSA deadline for federal aid is June 30, 2018, your state and school probably have earlier FAFSA deadlines for students who want to receive their aid. For some states, their deadline will be “as soon as possible after Oct. 1.” Some of these states may have limited financial aid funds—and you could miss out on aid if you wait until the last minute to apply. Check with your school’s financial aid office to make sure you are aware of, and are able to meet, all student aid deadlines. To maximize your potential aid, you should submit a FAFSA as early as possible after Oct. 1.

If You Submitted a FAFSA Previously

If you filed a 2016–17 FAFSA, then you will be asked if you want certain information from the 2016–17 FAFSA to pre-fill your 2017–18 FAFSA. This process will allow you to complete the 2017–18 FAFSA in less time.

Using an FSA ID to Sign Your FAFSA

An FSA ID is a username and password that you will need if you plan to sign your FAFSA electronically. While you are not required to use an FSA ID to sign a FAFSA electronically, it is recommended since it's the fastest way to complete the application process.

If you are a dependent student, then your parent(s) will need to provide some information and sign the FAFSA. Your parent will need his or her own FSA ID if he or she plans to sign the FAFSA electronically.

It's important that you and your parent each create your own FSA ID. You should not create an FSA ID for your parent and a parent should not create an FSA ID for you. Your FSA ID has the same legal status as a written signature and it is used to sign legally binding documents electronically. Don't share your FSA ID with anyone—even if that person is helping you complete the FAFSA. Sharing your FSA ID could put you at risk for identity theft or could result in problems or delays with your financial aid.

For additional information on the FSA ID and to create your FSA ID, go to StudentAid.gov/fsaid.

What happens after I apply?

After receiving your completed application, the FAFSA processor will analyze your FAFSA information and provide a *Student Aid Report* (SAR) or a *SAR Acknowledgement* that summarizes the information you provided on your FAFSA. Whether you receive your SAR online or on paper depends on whether you provided an email address on your FAFSA. If you have a valid email address on file, you should receive an email within three to five days that provides a link to view an online copy of your SAR. If you did not provide an email address when you submitted your FAFSA, you will receive a paper SAR or *SAR Acknowledgement* in the mail within three weeks.

When you get your SAR, review it carefully to make sure it's correct and complete.

Your FAFSA information is shared with the colleges and/or career schools you list on the FAFSA. The financial aid office at each school will use your information to determine how much federal student aid you may receive at that school. If the school has its own funds to use for financial aid, it might use your FAFSA information to determine your eligibility for that aid as well. You can learn more about what happens after you submit your FAFSA at StudentAid.gov/fafsa/next-steps.

What financial aid will I get?

Your eligibility for federal student aid depends on your Expected Family Contribution or EFC (an index number calculated using your FAFSA information and a formula specified by law), your year in school, your enrollment status, and the cost of attendance at the school you will be attending. You can learn more about how aid is calculated at [StudentAid.gov/how-calculated](https://studentaid.gov/how-calculated).

The financial aid office at your school will determine the types of and how much financial aid you are eligible to receive. Your school's aid office will send you a financial aid offer (or award letter) explaining the types and amounts of financial aid you may receive from federal, state, private, and school sources. This combination of aid is your financial aid package. If you have any questions about your aid offer, contact your school's financial aid office. If you've applied to several schools, be sure to compare aid offers to see which school will be the most affordable once aid is taken into account.

How will I get my financial aid?

Your school will distribute your financial aid. How you will receive your aid will depend on the type of aid—grants, student loans, work-study, and parent loans. The school will provide you with information on how and when your aid will be distributed. Typically, the school first applies your aid money toward your tuition, fees, and (if you live on campus) room and board. Any money left over is paid to you for other education-related expenses. For more information on receiving aid, go to [StudentAid.gov/fafsa/next-steps/receive-aid](https://studentaid.gov/fafsa/next-steps/receive-aid).

Additional Resources

After reviewing this document, if you have additional questions about how to complete the FAFSA, you can call the Federal Student Aid Information Center (FSAIC) at 1-800-4-FED-AID (1-800-433-3243) or contact the financial aid office at the school you are interested in attending. You can also go to Federal Student Aid's primary website—[StudentAid.gov](https://studentaid.gov). StudentAid.gov provides in-depth information on preparing for and funding college, career school, and graduate school.

Help and Hints: Instructions for Each Question

When you complete the FAFSA online at fafsa.gov, you will see instructions for each question. In addition, each question will have “Help and Hints” that can be found on the right-hand side of the screen. The remainder of this document provides the Help and Hints for each FAFSA question.

Note: If you complete the FAFSA online, then you may automatically skip some questions based on your answers to earlier questions. For example, if you are considered an independent student, you will not have to provide your parents’ financial information. The fafsa.gov site will display only the questions you need to answer.

Overview for Questions 1–31 (All applicants must complete)

Purpose: These questions collect personal identification information (name, telephone number, address, Social Security number, and so on) as well as other information that affects your basic eligibility for federal (or state and some institutional) student aid. For example, this section includes a question about citizenship status because you must be a U.S. citizen or eligible noncitizen to receive federal student aid.

Question 1: Student’s Last Name (Your last name)

This is your proper last name, not a nickname, and it must match exactly the name on your Social Security card. Remember to only use letters (A-Z), numbers (0-9), periods (.), apostrophes (’), dashes (-), or blanks (spaces). No other characters are allowed.

Question 2: Student’s First Name (Your first name)

This is your proper first name, not a nickname, and it must match exactly the name on your Social Security card. Remember to only use letters (A-Z), numbers (0-9), periods (.), apostrophes (’), dashes (-), or blanks (spaces). No other characters are allowed.

Question 3: Student’s Middle Initial (Your middle initial)

Enter your middle initial. It must match exactly the middle initial on your Social Security card. You can only use letters (A-Z) or blanks (spaces). No other characters are allowed.

Question 4: Student’s Permanent Mailing Address (Your permanent mailing address)

Enter your street number and street name (include apartment number).

Use street address abbreviations, such as APT (apartment) or AVE (avenue), if the address is longer than the space provided.

Only use letters (A-Z), numbers (0-9), periods (.), commas (,), apostrophes ('), dashes (-), number symbols (#), at symbols (@), percent symbols (%), ampersands (&), slashes (/), or blanks (spaces). No other characters are allowed.

Some communications regarding your financial aid application will be sent to your permanent mailing address if you do not provide an e-mail address. Do not use the address of your school's financial aid office, any other office, or an address you use only during the school year.

See fafsa.ed.gov/help/ffdef11.htm for instructions on how to enter your address if you live outside the United States.

Question 5: Student's Permanent City (Your city)

You must enter the city for your permanent mailing address.

Only use letters (A-Z), numbers (0-9), periods (.), commas (,), apostrophes ('), dashes (-), number symbols (#), at symbols (@), percent symbols (%), ampersands (&), slashes (/), or blanks (spaces). No other characters are allowed.

For information on entering foreign addresses, see fafsa.ed.gov/help/ffdef11.htm.

Question 6: Student's Permanent State (Your state)

Select the state for your permanent mailing address.

For information on entering foreign addresses, see fafsa.ed.gov/help/ffdef11.htm.

Question 7: Student's Permanent ZIP Code (Your ZIP code)

You must enter the ZIP code for your permanent mailing address.

For Mexico, Canadian Provinces, or another address outside the United States, enter 00000 for the ZIP code.

Question 8: Student's Social Security Number (Your Social Security Number)

You must enter your Social Security Number (SSN) to be considered for Federal Student Aid. Enter the SSN that is printed on your Social Security card. Enter this number without dashes. For example, enter 123456789.

Your SSN is automatically filled in on your FAFSA based on the FSA ID or SSN you enter on the "Login" page. If you incorrectly enter your SSN on the "Login" page, you cannot change it and you will have to start a new FAFSA.

Special instructions for citizens of the Freely Associated States.

If you do not have an SSN and are a citizen of the Federated States of Micronesia, the Republic of the Marshall Islands, or Palau, otherwise known as the Freely Associated States, enter 666 in the first three positions of the SSN field and leave the remaining six positions blank. When your application is processed, the last six digits of the SSN will be assigned to you. You should save that number and continue to use the same one every year you complete a FAFSA.

If our system has assigned you a nine-digit identifier beginning with 888, enter that identifier, but replace the 888 with 666.

Question 9: Student’s Date of Birth (Your date of birth)

This is your date of birth in “mmddyyyy” format, and it must match exactly the date of birth on your Social Security card. For example, if your birthday is May 3, 1980, enter 05031980.

Question 10: Student’s Telephone Number (Your telephone number)

Enter your telephone number. Provide the area code first. Enter the numbers, without parentheses and dashes. For example, 2025551212. If you do not have a telephone number, you may leave this question blank.

Question 11: Student’s Driver’s License Number (Your driver's license number)

Enter your driver's license number or the number on your identification card.

Use only numbers (0-9), letters (A-Z), dashes (-), asterisks (*), or blanks (spaces). An asterisk is not allowed in the first position, and the answer cannot contain all asterisks.

Question 12: Student’s Driver’s License State (Your driver's license state)

Select the state that issued your driver’s license or identification card. Select Foreign Country if your license was issued by a foreign country.

Question 13: Student’s E-mail Address (Your e-mail address)

Federal Student Aid uses your e-mail address to communicate important information about your application. E-mail addresses have only one @ symbol. The first character cannot be the “@” symbol. Periods cannot be first, last, or next to another period.

Question 14: Student’s Citizenship Status (Are you a U.S. citizen?)

You must select the option that indicates your citizenship status. Select U.S. citizen if you are a U.S. citizen or U.S. national. Select Eligible noncitizen if you are:

- A U.S. permanent resident, with a Permanent Resident Card (I-551), or a conditional permanent resident with a Conditional Green Card (I-551C)

- Other eligible noncitizen with an Arrival-Departure Record (I-94) from the Department of Homeland Security showing any one of the following designations: “Refugee,” “Asylum Granted,” “Parolee” (I-94 confirms that you were paroled for a minimum of one year and status has not expired), T-Visa holder (T-1, T-2, T-3, etc.), or “Cuban-Haitian Entrant”
- The holder of a valid certification or eligibility letter from the Department of Health and Human Services showing a designation of “Victim of human trafficking”
- A resident of the Republic of Palau (PW), the Republic of the Marshall Islands (MH), or the Federated States of Micronesia (FM)
- A Canadian-born Native American under terms of the Jay Treaty

Select “Neither citizen nor eligible noncitizen” if you are in the U.S. and have:

- Been granted Deferred Action for Childhood Arrivals (DACA)
- A F1 or F2 student visa
- A J1 or J2 exchange visitor visa
- A G series visa (pertaining to international organizations)
- Other categories not included under U.S. citizen and eligible noncitizen

Question 15: Student’s Alien Registration Number (Your Alien Registration Number)

Enter your eight- or nine-digit Alien Registration Number. If your Alien Registration Number is eight digits, type a zero before the Alien Registration Number. Do not enter the “A” before the number.

An answer is not required if you are a citizen of the Federated States of Micronesia, the Marshall Islands, or Palau.

Question 16: Student’s Marital Status (What is your marital status?)

Select the answer that describes your marital status as of the day you submit your Free Application for Federal Student Aid (FAFSA). If your marital status has changed or will change since the time the application was initially submitted, check with your college’s financial aid office.

“Married or remarried” does not mean living together unless your state of legal residence recognizes the relationship as a common law marriage.

For FAFSA purposes, a married couple is separated if the couple is considered legally separated by a state, or if the couple is legally married but has chosen to live separate lives, including living in separated households, as though they were not married. If you and your spouse are separated but living together, select “I am married / remarried,” not “I am separated.”

Note: When two married persons live as a married couple but are separated by physical distance (or have separate households), they are considered married for FAFSA purposes.

Question 17: Student's Marital Status Date (Month and year you were married, separated, divorced, or widowed)

If you are legally married as of today, enter the date you married or remarried. If you are currently separated, enter the date you became separated. If you are currently divorced, enter the date you separated or divorced, whichever is earlier. If you are currently widowed, enter the date you became widowed.

Enter two numbers for the month and four numbers for the year. Do not include a slash (/). If the month is less than 10, enter a zero in front of the number. For example, if you were married in August 1989, enter 081989.

Question 18: Student's State of Legal Residence (What is your state of legal residence?)

Select your current state or country of legal residence. Select Foreign Country if your legal residence is in a foreign country.

Your answer represents the residency or domicile of your true, fixed, and permanent home. If you moved into a state for the sole purpose of attending a school, do not count that state as your state of legal residence.

Each state determines legal residency differently. You should contact your college's financial aid office for assistance with state of legal residence qualifications.

Question 19: Was Student a Legal Resident Before January 1, 2012? (Did you become a legal resident of your state before January 1, 2012?)

Select Yes if you became a legal resident of the state you entered in question 18 before January 1, 2012.

Select No if you became a legal resident of the state you entered in question 18 on or after January 1, 2012.

Question 20: Student's Legal Residence Date (Month and year you became a legal resident)

You indicated you were not a legal resident of the state entered in the state of legal residence question before January 1, 2012. You must type the month and year you became a legal resident.

Your state will use this information to determine if you meet its criteria for state financial aid.

Enter two numbers for the month and four numbers for the year. If the month is less than 10, type a zero in front of the number. For example, August 2013 must be entered as 082013. You cannot enter a year that is later than the current one.

Question 21: Is the Student Male or Female? (Are you male or female?)

Your gender is used to determine if you need to register with the Selective Service System. Most male citizens and male immigrants must register with the Selective Service System to receive federal student aid. This requirement applies to any person assigned the sex of male at birth.

- Select male if you are male.
- Select female if you are female.

Question 22: Register Student With Selective Service? (Most male citizens and male immigrants must register with the Selective Service System to receive federal student aid. If you are not registered, select “Register me”)

If you are a male (age 18-25) and not registered with the Selective Service System, select Register Me and the Selective Service System will register you. You can also register over the Internet at www.sss.gov. This requirement applies to any person assigned the sex of male at birth.

If you believe that you are not required to register with the Selective Service System, you should call the Selective Service System office at 1-847-688-6888 for information regarding exemptions or visit the Selective Service System Web site at www.sss.gov.

Question 23: Student Convicted of Possession or Sale (Have you been convicted for the possession or sale of illegal drugs for an offense that occurred while you were receiving federal student aid (grants, work-study, and / or loans)?)

Select No if:

- You have never received federal student aid.
- You have never had a conviction for possessing or selling illegal drugs.
- The conviction was not a state or federal offense.
- The conviction occurred before you were 18 years of age and you were not tried as an adult.
- The conviction was removed from your record.
- The offense that led to your conviction did not occur during a period of enrollment for which you were receiving federal student aid (grants, work-study, or loans).

If you select Yes, you may still be eligible for federal student aid. Additional questions will display to help you determine your eligibility. Past convictions do not automatically make you ineligible for student aid.

Even if you are not eligible for federal student aid, complete and submit your Free Application for Federal Student Aid (FAFSA) because you may be eligible for state or school financial aid.

For more information about drug-related convictions, call the Federal Student Aid Information Center at 1-800-4-FED-AID (1-800-433-3243).

Questions 24 and 25: Parent’s Educational Level (Highest school your parent completed)

Select the answer that best describes your parent’s highest level of education completed.

This question is used for state scholarship purposes only and does not affect your eligibility for federal student aid. For this question, parent means your birth or adoptive parent. Do not answer this question about a stepparent, legal guardian, or foster parent.

Question 26: Student’s High School or Equivalent Completed (What will your high school completion status be when you begin college in the 2017-2018 school year?)

Select the answer that describes your high school completion status.

- High school diploma means you have received or will receive a U.S. high school diploma before the first date of your enrollment in college or you have received or will receive a foreign school diploma that is equivalent to a U.S. high school diploma before the first date of your enrollment in college.
- GED certificate or state authorized high school equivalent certificate means you have received or will receive a General Educational Development (GED) certificate or state authorized high school equivalent certificate before the first date of your enrollment in college. A state authorized high school equivalent certificate is a certificate that the issuing state recognizes as the equivalent of a high school diploma in that state. Note: A high school certificate of attendance and/or a certificate of completion are NOT the equivalent of a high school diploma.
- Home schooled means you have completed home schooling at the secondary level regulated by your state.
- None of the above means you do not have a high school diploma, GED, or equivalent and did not complete secondary school in a home school setting.

Question 27: Student’s High School Name, City, and State

Enter the name, city, and state of the high school where you received or will receive your high school diploma.

Select Foreign Country from the “In what state is your high school located?” dropdown box if you received a foreign school diploma that is equivalent to a U.S. high school diploma.

Enter as much information as possible to receive the most relevant search results. For the high school name and city, you may enter the full name or commonly accepted abbreviations or aliases. For example, you can enter “Kennedy HS” for Kennedy High School, or “St. Paul” for Saint Paul.

Click Confirm to continue and we will search for high schools that match the information you provided. You can then select the correct high school from the search results. If you do not find a matching high school in the search results, click Next to continue.

If the high school name, city, and state combination that you entered does not match any schools in our database, then double-check the spelling of the city and/or school name, and try your search again.

Question 28: Will you have your first bachelor’s degree before you begin the 2017–18 school year?

- Select Yes if you have or will have a bachelor’s degree by July 1, 2017.
- Select Yes if you have or will have a degree that is equal to a bachelor’s degree from a school in another country by July 1, 2017.
- Select No if you do not and will not have a bachelor’s degree by July 1, 2017.

Question 29: Student’s Grade Level in College in 2017–18 (What will your college grade level be when you begin the 2017-2018 school year?)

Select your grade level in college from July 1, 2017 through June 30, 2018. If you are currently a senior in high school or will be a first-time college student, select Never attended college / 1st yr.

“Grade level” does not mean the number of years you have attended college, but refers to your grade level in regard to completing your degree or certificate. A student who is not enrolled full-time will require more years than a full-time student to reach the same grade level.

Question 30: Type of Degree / Certificate (What degree or certificate will you be working on when you begin the 2017-2018 school year?)

Select the degree or certificate that you will be working toward during the 2017–18 school year. If your degree or certificate does not fit into any of the categories listed below or if you are undecided, select Other / undecided from the list.

Question 31: Interested in Work-study? (Are you interested in being considered for work-study?)

The Federal Work-study Program provides jobs for undergraduate and graduate students with financial need, allowing them to earn money to help pay educational expenses.

- Select Yes if you are interested in being considered for work-study. Selecting this response does not guarantee that you will be offered Federal Work-study.
- Select No if you are not interested in being considered for work-study.
- Select Don’t know if you do not know if you are interested in being considered for work-study.

All students will be considered for federal student grants and loans. You can decline any financial aid that is offered to you, including Federal Work-study.

Overview for Questions 32–45 (All Applicants Must Complete)

Purpose: All students (dependent and independent) must provide their financial information for these questions. The Expected Family Contribution (EFC) calculation, determined by a formula specified by law, uses a family’s income, assets, exemptions, and household size to determine whether the family has discretionary income. If the family has discretionary income, a portion, and only a portion, of that income is included in the EFC as available for the student’s educational costs. Note: For the 2017–18 FAFSA, you will need to provide 2015 tax information. If you complete your FAFSA online, you may be able to use the IRS Data Retrieval Tool to transfer your tax information from the Internal Revenue Service into your FAFSA.

Question 32: Student Filed 2015 Income Tax Return? (Have you completed a 2015 income tax return?)

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you “Will file” a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your income. If your income is not similar, click Income Estimator for assistance estimating your adjusted gross income, and answer the remaining questions about your income to the best of your ability.

Once you file, you must correct your FAFSA, changing 1) your filing status from “Will file” to “Already completed,” and 2) your estimated answers to the final amounts on your 2015 tax return. You may also be eligible to use the IRS Data Retrieval Tool to transfer your tax return information into the FAFSA.

Question 33: Student’s Type of 2015 Tax Form Used (What income tax return did you file or will you file for 2015?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, you must select the income tax return that you filed or will file for 2015.

Question 34: Student’s 2015 Tax Return Filing Status (For 2015, what is or will be your tax filing status according to your tax return?)

If you filed or will file a tax return, you must select your tax return filing status for 2015.

If you (and if married, your spouse) filed a 1040 or 1040A tax return, select the tax return filing status from the “Filing Status” field of your tax return.

If you (and if married, your spouse) filed a 1040EZ tax return, select Single if you are not married and select Married-Filed Joint Return if you are married.

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be identified as “Transferred from the IRS.”

Question 35: Student Eligible to File a 1040A or 1040EZ? (Were you eligible to file a 1041A or 1040EZ?)

Select Yes if you (and if married, your spouse):

- Filed or will file a 1040 or a foreign tax return but were eligible to file a 1040A or 1040EZ
- Filed a 1040 only to claim Lifetime Learning Tax Credit and you would have otherwise been eligible to file a 1040A or 1040EZ
- Filed a 1040 and were not required to file a tax return

In general, you are eligible to file a 1040A or 1040EZ if you:

- Make less than \$100,000 per year
- Do not itemize deductions
- Do not receive income from your own business or farm
- Do not receive self-employment income or alimony
- Are not required to file Schedule D for capital gains

If you filed a 1040 only to claim Lifetime Learning Tax Credit, and you would have otherwise been eligible for a 1040A or 1040EZ, you should answer “Yes” to this question.

If you filed a 1040 and were not required to file a tax return, you should answer “Yes” to this question.

If you filed a 1040 and were not required to file a tax return, you should answer “Yes” to this question.

Select No if you (or if married, your spouse) filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

You are not eligible to file a 1040A or 1040EZ if you:

- Make \$100,000 or more per year
- Itemize deductions
- Receive income from your own business or farm
- Receive self-employment income or alimony
- Are required to file Schedule D for capital gains

If you do not know if you are eligible to file a 1040A or 1040EZ, select Don't know.

Question 36: Student’s 2015 Adjusted Gross Income (What was your adjusted gross income for 2015?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

This question cannot be left blank unless you will not file a tax return.

If the answer to this question is not pre-filled, enter the amount of your (and if married, your spouse’s) adjusted gross income (AGI) in 2015.

AGI includes more than wages earned. For example, it can include alimony, Social Security, and business income.

If you filed a tax return (or if married, you and your spouse filed a joint tax return), the AGI can be found on:

IRS Form	Enter Amount From Line
1040	37
1040A	21
1040EZ	4

If you and your spouse filed separate tax returns, use the table below to calculate your total AGI.

If you filed a...	...and your spouse filed a...	Then enter the following:
1040	1040	Add line 37 from both tax returns and enter the total amount
1040	1040A	Add line 37 from the 1040 and line 21 from the 1040A and enter the total amount
1040	1040EZ	Add line 37 from the 1040 and line 4 from the 1040EZ and enter the total amount
1040A	1040	Add line 21 from the 1040A and line 37 from the 1040 and enter the total amount

1040A	1040A	Add line 21 from both tax returns and enter the total amount
1040A	1040EZ	Add line 21 from the 1040A and line 4 from the 1040EZ and enter the total amount
1040EZ	1040	Add line 4 from the 1040EZ and line 37 from the 1040 and enter the total amount
1040EZ	1040A	Add line 4 from the 1040EZ and line 21 from the 1040A and enter the total amount
1040EZ	1040EZ	Add line 4 from both tax returns and enter the total amount

If you or your spouse will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

If one of you filed a tax return and the other did not and will not file, use the table below to calculate your total AGI.

If you...	...and your spouse...	Then enter the following:
filed a 1040	did not and will not file	Add line 37 from the 1040 to your spouse's income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
filed a 1040A		Add line 21 from the 1040A to your spouse's income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
filed a 1040EZ		Add line 4 from the 1040EZ to your spouse's income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
did not and will not file	filed a 1040	Add line 37 from the 1040 to your income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
	filed a 1040A	Add line 21 from the 1040A to your income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
	filed a 1040EZ	Add line 4 from the 1040EZ to your income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)

Note: The line numbers above are from the Internal Revenue Service (IRS) tax form, not from the W-2 form.

If your (and if married, your spouse's) 2015 AGI is:

AGI	Enter
Ten million or more	9999999

Negative ten million or less	-9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 37: Student’s 2015 U.S. Income Tax Paid (What was your income tax for 2015?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

This question cannot be left blank unless you will not file a tax return.

If the answer to this question is not pre-filled, enter your total tax amount for 2015.

If you filed (or if married, you and your spouse filed a joint tax return), the total tax can be found on:

IRS Form	Enter Amount From Line
1040	Subtract line 46 from line 56 and enter the total
1040A	Subtract line 36 from line 28 and enter the total
1040EZ	10

If you and your spouse filed separate tax returns, use the table below to calculate your total income tax.

If you filed a...	...and your spouse filed a...	Then enter the following:
1040	1040	Subtract line 46 from line 56 from both tax returns and enter the total amount
1040	1040A	Subtract line 46 from line 56 from the 1040 and subtract line 36 from line 28 from the 1040A and enter the total amount
1040	1040EZ	Subtract line 46 from line 56 from the 1040 and add line 10 from the 1040EZ and enter the total amount
1040A	1040	Subtract line 36 from line 28 from the 1040A and subtract line 46 from line 56 from the 1040 and enter the total amount
1040A	1040A	Subtract line 36 from line 28 from both tax returns and enter the total amount
1040A	1040EZ	Subtract line 36 from line 28 from the 1040A and add line 10 from the 1040EZ and enter the total amount
1040EZ	1040	Add line 10 from the 1040EZ and subtract line 46 from line 56 from the 1040 and enter the total amount
1040EZ	1040A	Add line 10 from the 1040EZ and subtract line 36 from line 28 from the 1040A and enter the total amount

1040EZ	1040EZ	Add line 10 from both tax returns and enter the total amount
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If you or your spouse will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line numbers above are from the Internal Revenue Service (IRS) tax form, not from the W-2 form.

If your total tax for 2015 is:

Income Tax	Enter
Ten million or more	9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Note: Income tax is not income. It is the amount of tax that you (and if married, your spouse) paid on your income earned from work. Your income tax amount should not be the same as your adjusted gross income (AGI).

Question 38: Student’s 2015 Exemptions Claimed (How many exemptions did you claim?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

This question cannot be left blank if you (and if married, your spouse) filed or will file a 2015 income tax return.

If you filed (or if married, you and your spouse filed a joint tax return), the total exemptions can be found on:

- IRS Form 1040 – Use Line: 6d.
- IRS Form 1040A – Use Line: 6d.
- IRS Form 1040EZ, and didn’t check either box on line 5, enter 01 if you are single, or 02 if you are married.
- IRS Form 1040EZ, and checked either the “you” or “spouse” box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$4,000 equals one exemption).

If you are married, but filed or will file separate tax returns for 2015, add your and your spouses exemptions.

Note: The line numbers above are from the IRS tax form, not from the W-2 form.

Question 39: Student’s 2015 Income Earned from Work (How much did you earn from working in 2015?)

If you are not married and use the IRS Data Retrieval Tool, the answer to this question will be pre-filled.

If you are married and use the IRS Data Retrieval Tool, your and your spouse’s total income earned from working is transferred from the IRS. You are required to enter your portion of the transferred amount.

If you filed a 1040 tax return and use the IRS Data Retrieval Tool, tax information from IRS Schedule K-1 (Form 1065) is not transferred from the IRS. You are required to enter the amount that you reported in Box 14 [Code A] of IRS Schedule K-1 (Form 1065), if applicable.

If you filed or will file a tax return and do not use the IRS Data Retrieval Tool, include the “wages, salaries, tips, etc.” from your 2015 income tax return. If the amount is on a joint tax return, report your earnings separately from your spouse’s.

If you filed:

IRS Form	Use Line
1040	7 + 12 +18* + Box 14 [Code A] of IRS Schedule K-1 (Form 1065)
1040A	7
1040EZ	1

Tax filers who are not self-employed should only use line 7.

*Lines 12 and 18 and Box 14 [Code A] of IRS Schedule K-1 (Form 1065) are for tax filers who are self-employed.

Note: If values from lines 12 or 18 or Box 14 [Code A] of IRS Schedule K-1 (Form 1065) are negative, treat them as zero when determining the income earned from work.

If you are not a tax filer, add up all earnings on your W-2 form(s). The total of these amounts must be reported as income earned from work.

If your 2015 income earned from work is:

Income Earned from Work	Enter
Ten million or more	9999999
Negative ten million or less	-9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 40: Spouse’s 2015 Income Earned from Work (How much did your spouse earn from working in 2015?)

This question cannot be left blank if student’s marital status is married.

If you are married and use the IRS Data Retrieval Tool, your and your spouse’s total income earned from working is transferred from the IRS. You are required to enter your spouse’s portion of the transferred amount.

If your spouse filed a 1040 tax return and you use the IRS Data Retrieval Tool, tax information from IRS Schedule K-1 (Form 1065) is not transferred from the IRS. You are required to enter the amount that your spouse reported in Box 14 [Code A] of IRS Schedule K-1 (Form 1065), if applicable.

If your spouse filed or will file a tax return and you do not use the IRS Data Retrieval Tool, include the “wages, salaries, tips, etc.” from your spouse's 2015 income tax return. If the amount is on a joint tax return, report your spouse's earnings separately from your own.

If your spouse filed:

IRS Form	Use Line
1040	7 + 12 + 18* + Box 14 [Code A] of IRS Schedule K-1 (Form 1065)
1040A	7
1040EZ	1

Tax filers who are not self-employed should only use line 7.

*Lines 12 and 18 and Box 14 [Code A] of IRS Schedule K-1 (Form 1065) are for tax filers who are self-employed.

Note: If values from lines 12 or 18 or Box 14 [Code A] of IRS Schedule K-1 (Form 1065) are negative, treat them as zero when determining the income earned from work.

If your spouse is not a tax filer, add up all earnings on your spouse's W-2 form(s). The total of these amounts must be reported as income earned from work.

If your spouse's 2015 income earned from work is:

Income Earned from Work	Enter
Ten million or more	9999999
Negative ten million or less	-9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 41: Student’s Total of Cash, Savings, and Checking Accounts (What is the total current balance of your cash, savings, and checking accounts?)

Add the account balances of your (and if married, your spouse’s) cash, savings, and checking accounts as of the day you submit your Free Application for Federal Student Aid (FAFSA). Enter the total of all accounts as the total current balance. If the total is negative, enter zero as the total current balance.

Do not add student financial aid into your account balances.

If your (and if married, your spouse's) total account balances are:

Total Current Balance	Enter
Ten million or more	9999999
Negative or zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 42: Student’s Net Worth of Current Investments (What is the net worth of your investments?)

The net worth of your (and if married, your spouse’s) current investments is the amount left over after deducting the debt from the value of each investment.

For example: You (and if married, your spouse) own an investment property valued at \$100,000; however, \$75,000 in debt is owed on the property. The net worth of the investment is \$25,000 ($\$100,000 - \$75,000 = \$25,000$).

If you (and if married, your spouse) own multiple investments, total the net worth amounts and report them as a lump sum.

For example: You (and if married, your spouse) own two investment properties. The first investment property is valued at \$100,000. The debt that is owed on the property is \$110,000.

To calculate the net worth, perform the following calculation:

- (Value of Property) minus (Debt Owed on Property) = net worth
- $\$100,000 - \$110,000 = -\$10,000$

The net worth of this first investment property is considered \$0, not negative value of \$10,000.

The second investment property is valued at \$200,000. The debt that is owed on the property is \$100,000.

- (Value of Property) minus (Debt Owed on Property) = net worth
- $\$200,000 - \$100,000 = \$100,000$

The net worth of this second investment property is \$100,000.

If the net worth of the first investment property is \$0 and the net worth of the second investment property is \$100,000, then the amount to be reported for both properties is \$100,000.

If your (and if married, your spouse's) net worth as of the day you submit your Free Application for Federal Student Aid (FAFSA) is:

Net worth value	Enter
Ten million or more	9999999
Zero or less than zero	0

Round to the nearest dollar and do not include commas or decimal points.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Note: UGMA and UTMA accounts are considered assets of the student and must be reported as an asset of the student on the FAFSA, regardless of the student's dependency status. Do not include UGMA and UTMA accounts for which you are the custodian but not the owner.

Investments also include qualified educational benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans.

If you are not required to report parental information and you own (or if married, your spouse owns) any of these qualified educational benefit plans report the current balance of the plan as a student / spouse asset. The amount to be reported for a prepaid tuition plan is the "refund value" of the plan.

Investment value means the current balance or market value of these investments as of the day you submit your FAFSA. Investment debt means only those debts that are related to the investments.

Investments do not include the home in which you (and if married, your spouse) live; cash, savings and checking accounts; the value of life insurance and retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.).

For more information about reporting investments, call the Federal Student Aid Information Center at 1-800-4-FED-AID (1-800-433-3243)

Question 43: Student’s Net Worth of Businesses / Investment Farms (What is the net worth of your current businesses and/or investment farms?)

Type the net worth (current value minus debt) of the current businesses and / or investment farms that you (and if married, your spouse) own as of the day you submit your Free Application for Federal Student Aid (FAFSA).

The net worth of your (and if married, your spouse’s) current businesses and / or investment farms is the amount left over after deducting the debt from the value of each investment. A negative value of one investment cannot be used to reduce the value of other investments.

For example: You (and if married, your spouse) own two investment properties. The first investment property is valued at \$100,000. The debt that is owed on the property is \$110,000.

To calculate the net worth, perform the following calculation:

- (Value of Property) minus (Debt Owed on Property) = net worth
- \$100,000 – \$110,000 = -\$10,000

The net worth of this first investment property is considered \$0, not negative value of \$10,000.

The second investment property is valued at \$200,000. The debt that is owed on the property is \$100,000.

- (Value of Property) minus (Debt Owed on Property) = net worth
- \$200,000 – \$100,000 = \$100,000

The net worth of this second investment property is \$100,000.

If the net worth of the first investment property is \$0 and the net worth of the second investment property is \$100,000, then the amount to be reported for both properties is \$100,000.

If the net worth is:

Net worth value	Enter
Ten million or more	9999999
Zero or less than zero	0

Round to the nearest dollar and do not include commas or decimal points.

A business and / or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and / or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Business value does not include the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you such as a parent, sister, or cousin or (2) persons who are or were related to you by marriage such as a spouse, stepparent, or sister-in-law.

For more information about reporting investments, call the Federal Student Aid Information Center 1-800-4-FED-AID (1-800-433-3243).

Question 44a: Student’s Education Credits (What were your total education credits?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, enter the total amount of education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) you (and if married, your spouse) received in 2015.

If you filed (or if married, you and your spouse filed a joint tax return), the total education credits can be found on:

IRS Form	Use Line
1040	50
1040A	33

If you and your spouse filed separate tax returns, use the table below to calculate your total education credits.

If you filed a...	...and your spouse filed a...	Then enter the following:
1040	1040	Add line 50 from both tax returns and enter the total amount
1040	1040A	Add line 50 from the 1040 and line 33 from the 1040A and enter the total amount
1040A	1040A	Add line 33 from both tax returns and enter the total amount
1040A	1040	Add line 33 from the 1040A and line 50 from the 1040 and enter the total amount

If you or your spouse will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 44b: Student's Child Support Paid (How much total child support did you pay?)

Enter the total amount of child support you (and if married, your spouse) paid because of divorce or separation or as a result of a legal requirement in 2015. Do not include support for children in your household.

Round to the nearest dollar and do not include commas or decimal points.

Question 44c: Student's Taxable Earnings from Need-Based Employment Programs (What were your taxable earnings from need-based employment programs?)

Enter the total amount of taxable earnings that you (and if married, your spouse) received in 2015 from Federal Work-study or other need-based work programs such as fellowships and assistantships.

Federal Work-study is income earned from work. This income should appear on your W-2 form and should be reported as wages, whether or not you are a tax filer.

Round to the nearest dollar and do not include commas or decimal points.

Question 44d: Student's College Grant and Scholarship Aid Reported in AGI (How much taxable college grant or scholarship aid did you receive?)

Enter the total amount of college grant and scholarship aid reported to the IRS as part of your (or if married, your spouse's) adjusted gross income (AGI) for 2015.

Student aid types to report as part of the AGI may include:

- Grants
- Scholarships
- Waivers / Remissions
- Fellowships / Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or child care payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued during your AmeriCorps term of service)

Round to the nearest dollar and do not include commas or decimal points.

Question 44e: Student's Taxable Combat Pay Reported in AGI (How much combat pay or special combat pay did you report in your AGI?)

Enter the total amount of taxable combat pay or special combat pay that you (and if married, your spouse) received in 2015. Only enter the amount that was taxable and included in the

adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q.

Round to the nearest dollar and do not include commas or decimal points.

Question 44f: Student’s Cooperative Education Earnings (What were your earnings from work under a Cooperative Education Program offered by a college?)

Enter the total amount of income you (and if married, your spouse) earned from work under a cooperative education program offered by a college in 2015.

Round to the nearest dollar and do not include commas or decimal points.

Question 45a: Student’s Payments to Tax-Deferred Pensions and Retirement Savings (What were your total tax-deferred pension payments?)

Enter the total amount you paid to your (and, if you are married, your spouse’s) tax-deferred pension and retirement savings plans (paid directly or withheld from your earnings). These amounts are reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S. Don’t include amounts reported in code DD (employer contributions toward employee health benefits).

Round to the nearest dollar and do not include commas or decimal points.

Question 45b: Student’s Deductible Payments to IRA / Keogh / Other (How much did you pay to your IRA or Keogh?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, enter the total amount of your IRA deductions and payments to self-employed SEP, SIMPLE and Keogh and other qualified plans, in 2015.

If you filed (or if married, you and your spouse filed a joint tax return), the IRA/Keogh/SEP/SIMPLE payments can be found on:

- IRS Form 1040 – Use Lines: 28 + 32
- IRS Form 1040A – Use Line: 17

If you and your spouse filed separate tax returns, use the table below to calculate your total IRA/Keogh/SEP/SIMPLE payments.

If you filed a...	...and your spouse filed a...	Then enter the following:
1040	1040	Add lines 28 + 32 from both tax returns and enter the total

		amount
1040	1040A	Add lines 28 + 32 from the 1040 and line 17 from the 1040A and enter the total amount
1040A	1040A	Add line 17 from both tax returns and enter the total amount
1040A	1040	Add line 17 from the 1040A and the total of lines 28 + 32 from the 1040 and enter the total amount

If you or your spouse will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 45c: Student’s Child Support Received (How much total child support did you receive?)

Enter the total amount of child support you (and if married, your spouse) received in 2015 for all children in your household.

Round to the nearest dollar and do not include commas or decimal points.

Question 45d: Student’s Tax Exempt Interest Income (What was your total tax-exempt interest income?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, enter the total amount of tax-exempt interest income you reported in 2015.

If you filed:

- IRS Form 1040 – Use Line: 8b
- IRS Form 1040A – Use Line: 8b

If married, and you and your spouse filed separate tax returns, enter the total amount of your combined tax-exempt interest income.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 45e: Student’s Untaxed Portions of IRA Distributions (What were your total untaxed portions of IRA distributions?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.” You must subtract rollover amounts from the total.

If the answer to this question is not pre-filled, enter the total amount of the untaxed portions of IRA distributions you (and if married, your spouse) received in 2015. If the total is a negative amount, enter a zero (0).

If you filed (or if married, you and your spouse filed a joint tax return):

- IRS Form 1040 – Use Lines: 15a minus 15b, and subtract rollover amounts from the total.
- IRS Form 1040A – Use Lines: 11a minus 11b, and subtract rollover amounts from the total.

If you and your spouse filed separate tax returns, use the table below to calculate your total untaxed portions of IRA distributions.

If you filed a...	...and your spouse filed a...	Then enter the following:
1040	1040	Subtract the total of lines 15b from the total of lines 15a. Then subtract all rollover amounts from the remainder.
1040	1040A	For the 1040 - Subtract line 15b from line 15a, then subtract all rollover amounts from the remainder. For the 1040A - Subtract line 11b from line 11a, then subtract all rollover amounts from the remainder. Add the total remainders from the 1040 and 1040A and enter this amount.
1040A	1040A	Subtract the total of lines 11b from the total of lines 11a. Then subtract all rollover amounts from the remainder.
1040A	1040	For the 1040A - Subtract line 11b from line 11a, then subtract all rollover amounts from the remainder. For the 1040 - Subtract line 15b from line 15a, then subtract all rollover amounts from the remainder. Add the total remainders from the 1040 and 1040A and enter this amount.

If you or you and your spouse will file a federal tax return, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Questions 45f: Students Untaxed Portions of Pensions (What were your total untaxed portions of pensions?)

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.” You must subtract rollover amounts from the total.

If the answer to this question is not pre-filled, enter the total amount of untaxed portions of your pensions earned in 2015. If the total is a negative amount, enter a zero (0).

If you filed (or if married, you and your spouse filed a joint tax return):

- IRS Form 1040 – Use Lines: 16a minus 16b, and subtract rollover amounts from the total.
- IRS Form 1040A – Use Lines: 12a minus 12b, and subtract rollover amounts from the total.

If you and your spouse filed separate tax returns, use the table below to calculate your untaxed portions of pensions.

If you filed a...	...and your spouse filed a...	Then enter the following:
1040	1040	Subtract the total of lines 16b from the total of lines 16a. Then subtract all rollover amounts from the remainder.
1040	1040A	For the 1040 - Subtract line 16b from line 16a, then subtract all rollover amounts from the remainder. For the 1040A - Subtract line 12b from line 12a. Then subtract all rollover amounts from the remainder. Add the total remainders from the 1040 and 1040A and enter the amount.
1040A	1040A	Subtract the total of lines 1b from the total of lines 12a. Then subtract all rollover amounts from the remainder.
1040A	1040	For the 1040A - Subtract line 12b from line 12a. Then subtract all rollover amounts from the remainder. For the 1040 - Subtract line 16b from line 16a, then subtract all rollover amounts from the remainder. Add the total remainders from the 1040 and 1040A and enter the amount.

If you or your spouse will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Questions 45g: Student’s Housing, Food, and Living Allowances (What were your total allowances received?)

Enter the total cash value of housing, food, and any other living allowances you received in 2015. These allowances are often paid to military, clergy and others.

Do not include rent subsidies for low-income housing, the value of on-base military housing or the value of a basic military allowance for housing.

Round to the nearest dollar and do not include commas or decimal points.

Question 45h: Student’s Veterans Noneducation Benefits (What were your total veterans noneducation benefits?)

Enter the total amount of veterans noneducation benefits you received in 2015. Veterans noneducation benefits include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and / or VA Educational Work-Study allowances.

Note: Do not include veterans educational benefits such as the:

- Montgomery GI Bill
- Dependents Education Assistance Program
- VA Vocational Rehabilitation Program
- VEAP Benefits
- Post-9 / 11 GI Bill

Round to the nearest dollar and do not include commas or decimal points.

Question 45i: Student’s Other Untaxed Income or Benefits (What was the total of your other untaxed income or benefits?)

Enter the total amount of any other untaxed income or benefits, such as workers compensation, Black Lung Benefits, untaxed portions of Railroad Retirement Benefits, disability benefits, etc. that you (and, if married, your spouse) received in 2015. Also include the untaxed portions of health savings accounts from IRS Form 1040 – line 25.

Do not include extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

Round to the nearest dollar and do not include commas or decimal points.

Question 45j: Money Received or Paid on Student’s Behalf (What other money has been paid on your behalf?)

Enter the total amount of cash support you (and if married, your spouse) received in 2015 from a friend or relative (other than your parents, if you are a dependent student). Report the amount if it is not reported elsewhere on this application.

If someone is paying rent, utility bills, etc., for you while you attend school, include the amount of that person's contributions, unless the person is your parent whose information is reported on this application.

Include money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

Note: This includes distributions to you (the student beneficiary) from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, uncles, and non-custodial parents).

Round to the nearest dollar and do not include commas or decimal points.

Overview for Questions 46–58 (Dependency Questions: All Applicants Must Complete)

Purpose: These questions are used to determine, according to law, whether you are a dependent or an independent student for federal student aid purposes. If you answer “No” to all of these questions, you are a dependent student, even if you do not live with your parents. On a case-by-case basis, a school’s financial aid administrator may make a dependency override (making an otherwise dependent student independent if he or she decides the student’s individual extenuating circumstances warrant the decision. The financial aid administrator’s decision is final and cannot be appealed to the U.S. Department of Education.

For more information on dependency status, go to Studentaid.gov/dependency.

If you are considered a dependent student, you will move on to questions 59–94, and will need to provide information about your parents. An independent student, who answers “Yes” to any one of the dependency questions, may skip questions 59–94 and pick up with question 95 and continues through to the end of the application.

Question 46: Student Born Before January 1, 1994? (Were you born before January 1, 1994?)

The answer to this question is pre-filled based on your answer to the date of birth question earlier in the application.

Question 47: Is Student Married? (Are you married?)

The answer to this question is pre-filled based on your answer to the marital status question earlier in the application.

- The answer to this question will display No if you reported that you are single, divorced, or widowed.
- The answer to this question will display Yes if you reported that you are married or separated.

Question 48: Student Working on Master's or Doctorate in 2017–18? (At the beginning of the 2017-2018 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?)

The answer to this question is pre-filled based on your answer to the grade level in college question earlier in the application.

- The answer to this question will display No if you indicated you never attended college or that you are an undergraduate student.
- The answer to this question will display Yes if you reported that you are a graduate or professional student.

If you expect to begin a master's or doctorate program sometime during the 2017–18 school year, you should contact your college's financial aid office for assistance with answering this question.

Question 49: Is Student's on Active Duty in U.S. Armed Forces? (Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?)

- Select Yes if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.
- Select No if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes. Also select No if you are not currently serving on active duty in the U.S. Armed Forces.

Question 50: Is Student a Veteran? (Are you a veteran of the U.S. Armed Forces?)

Select Yes if you are a veteran of the U.S. Armed Forces.

You are a veteran if you:

- Have engaged in active duty (including basic training) in the U.S. Armed Forces (Army, Navy, Air Force, Marines, or Coast Guard), or are a National Guard or Reserve enlistee who was called to active duty for other than state or training purposes, or were a cadet or midshipman at one of the service academies, and

- Were released under a condition other than dishonorable.

Also select Yes if you are not a veteran now but will be one by June 30, 2018.

Select No if you:

- Have never engaged in active duty (including basic training) in the U.S. Armed Forces,
- Are currently an ROTC student, a cadet or midshipman at a service academy,
- Are a National Guard or Reserves enlistee activated only for state or training purposes, or
- Were engaged in active duty in the U.S. Armed Forces but released under dishonorable conditions.

Also select No if you are currently serving in the U.S. Armed Forces and will continue to serve through June 30, 2018.

Question 51: Does Support Have Children He / She Supports? (Do you now have or will you have children who will receive more than half of their support from you between July 1, 2017 and June 30, 2018?)

- Select Yes if you have children and they are receiving more than half of their support from you (and if married, your spouse).
- Select Yes if you are expecting a child who will be born before or during the school year, and you (and if married, your spouse) will provide more than half of the child's support.
- Select No if you do not have children. Also select No if your children are not receiving more than half of their support from you (and if married, your spouse).

Question 52: Does Student Have Dependents Other than Children / Spouse? (Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2018?)

- Select Yes if other people (not your children or spouse) live with you. These other dependents must also be receiving more than half of their support from you and will continue to receive more than half of their support from you through June 30, 2018.
- Select No if you do not have dependents (other than your children or spouse). Also select No if you have dependents, but they are not receiving more than half of their support from you.

Question 53: Parents Deceased? / Student Ward of Court? / In Foster Care? (At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?)

- Select Yes if you had no living parent (biological or adoptive) at any time since you turned age 13, even if you are now adopted.

- Select Yes if you were in foster care at any time since you turned age 13, even if you are no longer in foster care as of today.
- Select Yes if you were a dependent or ward of the court at any time since you turned age 13, even if you are no longer a dependent / ward of the court as of today.

Note: For federal student aid purposes, someone who is incarcerated is not considered a ward of the court.

Note: The financial aid administrator at your college may require you to provide proof that you were in foster care or a dependent / ward of the court.

If you are not sure if you were in foster care, check with your state child welfare agency. You can find out the contact information for your state child welfare agency by visiting your state child welfare agency.

Question 54: Is or Was Student an Emancipated Minor? (As determined by a court in your state of legal residence, are you or were you an emancipated minor?)

- Select Yes if you can provide a copy of a court's decision that as of today you are an emancipated minor.
- Also select Yes if you can provide a copy of a court's decision that you were an emancipated minor immediately before you reached the age of being an adult in your state. The court must be located in your state of legal residence at the time the court's decision was issued.
- Select No if you are still a minor and the court decision is no longer in effect or the court decision was not in effect at the time you became an adult.

Note: The financial aid administrator at your college may require you to provide additional information such as a copy of the court's decision.

Question 55: Is or Was Student in Legal Guardianship? (Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?)

For this question, the definition of legal guardianship does not include your parents, even if they were appointed by a court to be your guardian. You are also not considered a legal guardian of yourself.

- Select Yes if you can provide a copy of a court's decision that as of today you are in legal guardianship.
- Also select Yes if you can provide a copy of a court's decision that you were in a legal guardianship immediately before you reached the age of being an adult in your state. The court must be located in your state of legal residence at the time the court's decision was issued.

- Select No if you are still a minor and the court decision is no longer in effect or the court decision was not in effect at the time you became an adult.
- Also select No and contact your school if custody was awarded by the courts and the court papers say custody (not guardianship).

Note: The financial aid administrator at your college may require you to provide additional information such as a copy of the court's decision.

Question 56: Is Student an Unaccompanied Homeless Youth as Determined by High School / Homeless Liaison? (At any time on or after July 1, 2016, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?)

Homeless means lacking fixed, regular and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent you may be considered homeless even if your parent would otherwise provide a place to live.

Unaccompanied means you are not living in the physical custody of your parent or guardian.

Youth means you are 21 years of age or younger or you are still enrolled in high school as of the day you sign this application.

- Select Yes if you received a determination at any time on or after July 1, 2016 that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless.
- Select No if you are not homeless or you do not have a determination.

You should contact the financial aid administrator at the college you plan to attend if you need help answering this question.

Note: The financial aid administrator at your college may require you to provide a copy of the determination.

Question 57: Is Student an Unaccompanied Homeless Youth as Determined by HUD? (At any time on or after July 1, 2016, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?)

Homeless means lacking fixed, regular and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if

you are living in any of these situations and fleeing an abusive parent you may be considered homeless even if your parent would otherwise provide a place to live.

Unaccompanied means you are not living in the physical custody of your parent or guardian.

Youth means you are 21 years of age or younger or you are still enrolled in high school as of the day you sign this application.

- Select Yes if you received a determination at any time on or after July 1, 2016 that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless.
- Select No if you are not homeless or do not have a determination.

You should contact the financial aid administrator at the college you plan to attend if you need help answering this question.

Note: The financial aid administrator at your college may require you to provide a copy of the determination.

Question 58: Is Student an Unaccompanied Homeless Youth as Determined by Director of Homeless Youth Center? (At any time on or after July 1, 2016, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?)

Homeless means lacking fixed, regular and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent you may be considered homeless even if your parent would otherwise provide a place to live.

Unaccompanied means you are not living in the physical custody of your parent or guardian.

Youth means you are 21 years of age or younger or you are still enrolled in high school as of the day you sign this application.

- Select Yes if you received a determination at any time on or after July 1, 2016 that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless.
- Select No if you are not homeless or self-supporting and at risk of being homeless, or you do not have a determination.

You should contact the financial aid administrator at the college you plan to attend if you need help answering this question.

Note: The financial aid administrator at your college may require you to provide a copy of the determination.

Overview for Questions 59–94 (Dependent Applicants Must Complete)

Purpose: Your legal parents must provide financial information for questions 59–94 if you are a dependent student (if you answered “No” to every question from 46–58). The EFC calculation uses information from this section to determine what portion of your parents’ income and assets should be available to contribute to your cost of attendance.

Question 59: Parents’ Marital Status (As of today, what is the marital status of your legal parents (biological and/or adoptive)?)

Select the answer that describes your parents’ marital status as of the day you submit your Free Application for Federal Student Aid (FAFSA).

“Parent” refers to a biological or adoptive parent or a person determined by the state to be a parent (for example, if the parent is listed on the birth certificate). If one of your parents is widowed or divorced and has remarried, answer the questions about that parent and your stepparent. Grandparents, foster parents, legal guardians, older brothers or sisters, widowed stepparents, and aunts and uncles are not considered parents unless they have legally adopted you.

“Married or Remarried” does not include parents who are living together who are not otherwise legally married unless your parents’ state of legal residence recognizes their relationship as a common law marriage. Additionally, if one of your parents is widowed or divorced and has remarried, choose “Married or Remarried” and answer the questions about that parent and your stepparent.

“Separated,” for FAFSA purposes, includes a married couple who is considered legally separated by a state, or if the couple is legally married but has chosen to live separate lives, including living in separate households, as though they were not married. If your parents are separated but living together, select “Married or Remarried,” not “Divorced or Separated.”

Note: When two married persons live as a married couple but are separated by physical distance (or have separate households), they are considered married for FAFSA purposes.

“Unmarried and both parents living together” means that both of your legal parents (biological and/or adoptive) are not married to each other but live in the same household. If your legal parents are divorced but living together, select “Unmarried and both parents living together.”

Question 60: Parents’ Marital Status Date (Month and year your parents were married, separated, divorced, or widowed)

- If your parents are legally married as of today, enter the date they married or remarried.
- If your parents are currently separated, enter the date they separated.

- If your parents are currently divorced, enter the date they were separated or divorced, whichever is earlier.
- If your parent is currently widowed, enter the date he or she became widowed.

Enter two numbers for the month and four numbers for the year. If the month is less than 10, enter a zero in front of the number. For example, August 1989 must be entered as 081989.

Questions 61 (Parent 1) and 65 (Parent 2): Parent’s Social Security Number (What is your parent’s Social Security Number?)

Enter your parent’s Social Security Number (SSN).

Enter this number without the dashes. For example, 123456789. If your parent does not have a Social Security Number, enter all zeros (e.g. 000000000).

The Social Security Number must match exactly the SSN on the Social Security card.

Questions 62 (Parent 1) and 66 (Parent 2): Parents’ Last Name (What is your parent’s last name?)

Enter your parent’s last name.

- You can only use letters (A-Z), numbers (0-9), periods (.), apostrophes (’), dashes (-), or blanks (spaces). No other characters are allowed.
- If your parent does not have a last name, enter his/her first name. Use his/her proper name, not a nickname.

Your parent’s Social Security Number (SSN) and last name must match exactly the number and name on the Social Security card. To update the information on a Social Security card, call the Social Security Administration at 1-800-772-1213 or go to www.ssa.gov.

Questions 63 (parent 1) and 67 (parent 2): Parent’s First Name Initial (What is your parent’s first initial?)

Enter the first initial of your parent’s first name. Use the initial of his/her proper name, not a nickname.

Use only letters (A-Z), or blank. No other characters are allowed.

Questions 64 (Parent 1) and 68 (Parent 2): Parent’s Date of Birth (What is your parent’s date of birth?)

Enter your parent’s date of birth. Enter this date in “mmddyyyy” format. For example, 08171959 for August 17, 1959.

Your parent's date of birth must match exactly the date of birth on file with the Social Security Administration. To update the information with the Social Security Administration, call 1-800-772-1213 or go to www.ssa.gov.

Question 69: Your parents' E-mail Address (Your parents' e-mail address)

If your parents have an e-mail address and would like to be notified by e-mail when your Free Application for Federal Student Aid (FAFSA) is processed, enter the e-mail address now.

- A valid e-mail address usually looks like this: matthew@msn.com or ashleydoe@yahoo.com
- E-mail addresses have only one @ symbol.
- The first character cannot be the @ symbol.
- Periods cannot be first, last, or next to another period.

Federal Student Aid uses your parents' e-mail address to communicate important information about your application.

Note: Some e-mail systems differentiate between uppercase and lowercase letters. Enter your parents' e-mail address in the format the e-mail provider will recognize.

Note: To ensure that our messages can be delivered to your parents' e-mail inbox, enter our originating e-mail address, FederalStudentAidFAFSA@cpsemail.ed.gov, into their e-mail address book.

If your parents do not have an e-mail address, leave this field blank.

Question 70: Parents' State of Legal Residence (What is your parents' state of legal residence?)

Select your parents' current state or country of legal residence. Select Foreign Country if your parents' legal residence is in a foreign country.

Your parent's answer represents the residency or domicile of their true, fixed, and permanent home.

If your parents are separated or divorced, use the state or country of legal residence for the parent whose information is reported on this application.

Each state determines legal residency differently. You should contact your college's financial aid office for assistance with state of legal residence qualifications.

If your legal parents (biological and/or adoptive) have different states of legal residence, answer for the parent that you lived with most during the last 12 months. If you did not live with one parent more than the other, provide information about the parent who provided more financial

support during the last 12 months, or during the most recent year that you actually received support from a parent.

A legal parent includes a biological or adoptive parent, or a person that the state has determined to be your parent (for example, when a state allows another person's name to be listed as a parent on a birth certificate). Grandparents, foster parents, legal guardians, older brothers or sisters, widowed stepparents, and aunts and uncles are not considered parents unless they have legally adopted you.

Questions 71: Were Parents Legal Residents Before January 1, 2012? (Did your parents become legal residents of their state before January 1, 2012?)

- Select Yes if your parents have lived in this state for 5 years or more.
- Select No if your parents have lived in this state for less than 5 years.

Question 72: Parents Legal Residence Date (Month and year your parents became legal residents)

You indicated your parents did not become legal residents of the state entered for their state of legal residence before January 1, 2012. You must enter the month and year for the parent who has been a legal resident of the state the longest. If your parents are divorced or separated, use the date for the parent whose financial information you reported on this application.

Enter the month and year your parents became legal residents. Enter two numbers for the month and four numbers for the year. If the month is less than 10, enter a zero in front of the number. For example, August 2013 must be entered as 082013.

Question 73: Parents' Number of Family Members in 2017–18 (Your parents' number of family members in 2017-2018 (household size))

To determine your parents' household size, include:

- yourself;
- your parents;
- the number of other children (other than yourself and even if they do not live with your parents) who will receive more than half of their support from your parents between July 1, 2017 and June 30, 2018; and
- the number of people who are not your parents' children but who live with your parents and receive more than half of their support from your parents, and will continue to receive more than half of their support from your parents between July 1, 2017 and June 30, 2018.

Question 74: Parents' Number in College in 2017–18 (Parents Excluded) (How many people in your parents' household will be college students in 2017-2018?)

Enter the number of people in your parents' household who will attend college between July 1, 2017 and June 30, 2018.

Include:

- Yourself, even if you will attend college less than half-time in 2017–18.
- Other people in your parents' household only if they will attend college at least half-time in 2017–18, in a program that leads to a college degree or certificate.

Do not include:

- Your parents, even if they are enrolled at least half-time in 2017–18 in a program leading to a degree or a certificate.
- Students at a U.S. service academy, because most of their primary educational expenses are paid for by the federal government.

Questions 75–79: Parents Received Medicaid / Supplemental Security Income / Supplemental Nutrition Assistance Program (SNAP) / Free or Reduced Price School Lunch / Temporary Assistance for Needy Families (TANF) / Special Supplemental Nutrition Program for Women, Infants, and Children?

Select the appropriate check box if your parents or anyone in your parents' household received any of the following during 2015 or 2016:

- Medicaid
- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program (SNAP)
- Free or Reduced Price School Lunch
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

Check None of the above if none of these benefits were received during 2015 or 2016.

Note: Family assistance programs such as SNAP and/or TANF might have different names in your parents' state. Also, answering this question will not reduce your eligibility for federal student aid or your eligibility for these federal benefits.

Question 80: Parents Filed 2015 Income Tax Return? (Have your parents completed a 2015 income tax return?)

This question asks whether or not your parents have filed or will file a 2015 income tax return. If your parents are now married (even if they were not married in 2015) answer this question about

them as a couple. If your parents are either not married, divorced, separated, or widowed, answer this question about the parent who is reporting financial information on this application.

Select the option that indicates your parents' 2015 income tax return filing status:

- Already completed
- Will file
- Not going to file

If your parents indicate they "Will file" a 2015 tax return and their 2015 income is similar to their 2014 income, use their 2014 income tax return to provide estimates for questions about their income. If their income is not similar, click Income Estimator for assistance estimating your parents' adjusted gross income, and answer the remaining questions about their income to the best of your ability.

Once your parents file, they must correct the FAFSA, changing 1) their status from "Will file" to "Already completed," and 2) their estimated answers to the final amounts on their 2015 tax return. They may also be eligible to use the IRS Data Retrieval Tool to transfer their tax return information into the FAFSA.

Question 81: Parents' Type of 2015 Tax Form Used (What type of income tax return did your parents file or will they file for 2015?)

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, you must select the income tax return that your parents filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federated States of Micronesia, and Palau tax returns)

Question 82: Parents' 2015 Tax Return Filing Status (For 2015, what is or will be your parents' tax filing status according to their tax return?)

If your parents filed or will file a tax return, you must select your parents' tax return filing status for 2015:

- Single
- Head of Household

- Married-Filed Joint Return
- Married-Filed Separate Return
- Qualifying Widow(er)
- Don't know

If your parents filed a 1040 or 1040A tax return, select the tax return filing status from the “Filing Status” field of your parents’ tax return.

If your parents filed a 1040EZ tax return, select Single if your parents are not married and select Married-Filed Joint Return if your parents are married.

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be identified as “Transferred from the IRS.”

Question 83: Parents Eligible to File 1040A or 1040EZ? (Were your parents eligible to file a 1040A or 1040EZ?)

Select Yes if your parent (or both of your parents if you are reporting information for both parents):

- Filed or will file a 1040 or a foreign tax return but were eligible to file a 1040A or 1040EZ
- Filed a 1040 only to claim Lifetime Learning Tax Credit but would have otherwise been eligible to file a 1040A or 1040EZ
- Filed a 1040 and were not required to file a tax return

In general, your parents are eligible to file a 1040A or 1040EZ if they:

- Make less than \$100,000 per year
- Do not itemize deductions
- Do not receive income from their own business or farm
- Do not receive self-employment income or alimony
- Are not required to file Schedule D for capital gains

If your parents filed a 1040 only to claim Lifetime Learning Tax Credit, and your parents would have otherwise been eligible for a 1040A or 1040EZ, your parents should answer “Yes” to this question.

If your parents filed a 1040 and were not required to file a tax return, your parents should answer “Yes” to this question.

Select No if either of your parents filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Your parents are not eligible to file a 1040A or 1040EZ if they:

- Make \$100,000 or more per year
- Itemize deductions
- Receive income from their own business or farm
- Receive self-employment income or alimony
- Are required to file Schedule D for capital gains

If your parents do not know if they are eligible to file a 1040A or 1040EZ, select Don't know.

Question 84: Is Parent a Dislocated Worker? (Is either of your parents a dislocated worker?)

This question asks if either of your parents is a dislocated worker. Answer this question about the parent who is completing the application.

In general, a person may be considered a dislocated worker if he / she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster;
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of relocating due to permanent change in duty station;
- is the spouse of an active duty member of the Armed Forces and is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment; or
- is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (for example: a stay-at-home mom or dad), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.

Except for the spouse of an active duty member of the Armed Forces, if a person quits work, generally he / she is not considered a dislocated worker even if, for example, the person is receiving unemployment benefits.

- Select Yes if your parent is a dislocated worker.
- Select No if your parent is not a dislocated worker.
- Select Don't know if you are not sure whether your parent is a dislocated worker. You may contact the financial aid administrator at your college if you need help answering this question.

Note: If you answer Yes, the financial aid administrator at your college may require proof that your parent is a dislocated worker.

Question 85: Parents’ 2015 Adjusted Gross Income (What was your parents’ adjusted gross income for 2015?)

If your parent uses the IRS Data Retrieval Tool and transfers his/her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If you are a dependent student, this question cannot be blank unless your parents did not and will not file a tax return.

The response indicates the adjusted gross income (AGI) reported on your parents’ 2015 income tax return.

If your parents filed a joint federal tax return, the AGI can be found on:

IRS Form	Line #
1040	37
1040A	21
1040EZ	4

If your parents filed separate tax returns, use the table below to calculate their total AGI.

If one parent filed a...	...and the other parent filed a...	Then enter the following:
1040	1040	Add line 37 from both tax returns and enter the total amount
1040	1040A	Add line 37 from the 1040 and line 21 from the 1040A and enter the total amount
1040	1040EZ	Add line 37 from the 1040 and line 4 from the 1040EZ and enter the total amount
1040A	1040A	Add line 21 from both tax returns and enter the total amount
1040A	1040EZ	Add line 21 from the 1040A and line 4 from the 1040EZ and enter the total amount
1040EZ	1040EZ	Add line 4 from both tax returns and enter the total amount

Note: If one or both parents will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

If one of your parents has filed a tax return and the other parent did not and will not file, use the table below to calculate their total AGI.

If one parent filed a...	...and the other parent...	Then enter the following:

1040	did not and will not file	Add line 37 from the 1040 to the other parent's income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
1040A		Add line 21 from the 1040A to the other parent's income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)
1040EZ		Add line 4 from the 1040EZ to the other parent's income earned from working (for example, earnings from the W-2 form(s) and/or any other earning statements)

Note: The line numbers above are from the Internal Revenue Service (IRS) tax form, not from the W-2 form.

AGI includes more than wages earned. For example, it can include alimony, Social Security, and business income.

If your parents' 2015 AGI is:

AGI	Enter
Ten million or more	9999999
Negative ten million or less	-9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 86: Parents' 2015 U.S. Income Tax Paid (What was your parents' total income tax for 2015?)

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

This question cannot be left blank unless your parents will not file a tax return.

If the answer to this question is not pre-filled, enter your parents' total tax amount for 2015.

If your parents filed:

IRS Form	Enter Amount From Line
1040	Subtract line 46 from line 56 and enter the total
1040A	Subtract line 36 from line 28 and enter the total
1040EZ	10

If your parents filed separate tax returns, use the table below to calculate their total tax amount.

If one parent filed a...	...and the other parent filed a...	Then enter the following:
1040	1040	Subtract line 46 from line 56 from both tax returns and enter the total amount
1040	1040A	Subtract line 46 from line 56 from the 1040 and subtract line 36 from line 28 from the 1040A and enter the total amount
1040	1040EZ	Subtract line 46 from line 56 from the 1040 and add line 10 from the 1040EZ and enter the total amount
1040A	1040A	Subtract line 36 from line 28 from both tax returns and enter the total amount
1040A	1040EZ	Subtract line 36 from line 28 from the 1040A and add line 10 from the 1040EZ and enter the total amount
1040EZ	1040EZ	Add line 10 from both tax returns and enter the total amount

If one or both parents will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

If you are reporting information for both parents and one parent filed a federal tax return, but the other parent did not, use the line numbers from the tax return your parent filed. If neither of your parents will file a federal tax return, enter zero.

Note: The line numbers above are from the Internal Revenue Service (IRS) tax form, not from the W-2 form.

If your parents' total tax for 2015 is:

Income Tax	Enter
Ten million or more	9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Note: Income tax is not income. It is the amount of tax that your parents paid on the income that they earned from work. Your parents' income tax amount should not be the same as their adjusted gross income (AGI).

Question 87: Parents' 2015 Exemptions Claimed (How many exemptions did your parents claim?)

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

This question cannot be left blank if your parents filed or will file a 2015 income tax return.

If your parents filed:

- IRS Form 1040 – Use Line: 6d.
- IRS Form 1040A – Use Line: 6d.
- IRS Form 1040EZ, and didn't check either box on line 5, enter 01 if they are not married, or 02 if they are married.
- IRS Form 1040EZ, and checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$4,000 equals one exemption).

If your parents are married or unmarried and both parents living together, but filed or will file separate tax returns for 2015, add both parents' exemptions.

If your parent who is providing financial information on this application is never married, divorced, separated, or widowed, only enter the exemptions for that parent, even if he or she filed a joint tax return for 2015.

Note: The line numbers above are from the IRS tax form, not from the W-2 form.

Questions 88 and 89: Parent's 2015 Income Earned from Work (How much did your parent earn from working in 2015?)

If your parent is not married and uses the IRS Data Retrieval Tool, the answer to this question will be pre-filled.

If your parents are married and use the IRS Data Retrieval Tool, your parents' total income earned from working is transferred from the IRS. You are required to enter each parents' portion of the transferred amount.

If your parent filed a 1040 tax return and uses the IRS Data Retrieval Tool, tax information from IRS Schedule K-1 (Form 1065) is not transferred from the IRS. You are required to enter the amount that your parent reported in Box 14 [Code A] of IRS Schedule K-1 (Form 1065), if applicable.

If your parent filed or will file a tax return and does not use the IRS Data Retrieval Tool, enter the "wages, salaries, tips, etc." from his/her 2015 income tax return. Also, include income that he/she earned from Federal Work-study or any other need-based employment.

If your parents filed a joint tax return, report each parent’s earnings separately. Your parents can use their W-2s or other earning statements to calculate their separate earning amounts.

For tax filers:

IRS Form	Enter Amount From Lines
1040	7 + 12 + 18* + Box 14 [Code A] of IRS Schedule K-1 (Form 1065)
1040A	7
1040EZ	1

Tax filers who are not self-employed should only use line 7.

*Lines 12 and 18 and Box 14 [Code A] of IRS Schedule K-1 (Form 1065) are for tax filers who are self-employed.

Note: If values from lines 12 or 18 or Box 14 [Code A] of IRS Schedule K-1 (Form 1065) are negative, treat them as zero when determining the income earned from work.

Note: The line numbers above are from the IRS tax form, not from the W-2 form.

If your parent did not file taxes, enter the total amount of earnings from work in 2015. Add up the earnings from the W-2 form and any other earning statements.

If your parent’s 2015 income earned from work is:

Parent’s Income from Work	Enter
Ten million or more	9999999
Negative ten million or less	-9999999
Zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 90: Parents’ Total of Cash, Savings, and Checking Accounts (What is the total current balance of your parents’ cash, savings, and checking accounts?)

Add the account balances of your parents’ cash, savings, and checking accounts as of the day you submit your Free Application for Federal Student Aid (FAFSA). Enter the total of all accounts as the total current balance. If the total is negative, enter zero as the total current balance.

Do not add student financial aid into the account balances.

If your parents’ balances are:

Total Current Balance	Enter
Ten million or more	9999999
Negative or zero	0

Round to the nearest dollar and do not include commas or decimal points.

Question 91: Parents' Net Worth of Current Investments (What is the net worth of your parents' investments?)

The net worth of your parents' current investments is the amount left over after deducting the debt from the value of each investment.

For example: Your parents own an investment property valued at \$100,000; however, \$75,000 in debt is owed on the property. The net worth of the investment is \$25,000 ($\$100,000 - \$75,000 = \$25,000$).

If your parents own multiple investments, total the net worth amounts and report them as a lump sum.

For example: Your parents own two investment properties.

The first investment property is valued at \$100,000. The debt that is owed on the property is \$110,000.

To calculate the net worth, perform the following calculation:

- (Value of Property) minus (Debt Owed on Property) = net worth
- $\$100,000 - \$110,000 = -\$10,000$

The net worth of this first investment property is considered \$0, not negative value of \$10,000.

The second investment property is valued at \$200,000. The debt that is owed on the property is \$100,000.

- (Value of Property) minus (Debt Owed on Property) = net worth
- $\$200,000 - \$100,000 = \$100,000$

The net worth of this second investment property is \$100,000.

If the net worth of the first investment property is \$0 and the net worth of the second investment property is \$100,000, then the amount to be reported for both properties is \$100,000.

If your parents' net worth as of the day you submit your Free Application for Federal Student Aid (FAFSA) is:

Net worth value	Enter
Ten million or more	9999999
Zero or less than zero	0

Round to the nearest dollar and do not include commas or decimal points.

Investments include real estate (do not include the home in which your parents live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc.

Note: UGMA and UTMA accounts are considered assets of the student and must be reported as an asset of the student on the FAFSA, regardless of the student's dependency status. Do not include UGMA and UTMA accounts for which your parents are the custodian but not the owner.

Investments also include qualified educational benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans.

Note: Students who must report parental information on this form should report all qualified educational benefits or education savings accounts owned by the parents and / or the dependent student as part of the parental assets.

Investments do not include the home in which your parents live; cash, savings and checking accounts; the value of life insurance and retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.).

Investment value means the current balance or market value of these investments as of the day you submit your FAFSA. Investment debt means only those debts that are related to the investments.

For more information about reporting investments, call the Federal Student Aid Information Center 1-800-4-FED-AID (1-800-433-3243).

Question 92: Parents' Net Worth of Businesses / Investment Farms (What is the net worth of your parents' current businesses and / or investment farms?)

Enter the net worth of your parents' current businesses and / or investment farms as of the day you submit your Free Application for Federal Student Aid (FAFSA). Net worth means current value minus debt (what is owed).

The net worth of your parents' current businesses and / or investment farms is the amount left over after deducting the debt from the value of each investment. A negative value of one investment cannot be used to reduce the value of other investments.

For example: Your parents own two investment properties.

The first investment property is valued at \$100,000. The debt that is owed on the property is \$110,000.

To calculate the net worth, perform the following calculation:

- (Value of Property) minus (Debt Owed on Property) = net worth
- $\$100,000 - \$110,000 = -\$10,000$

The net worth of this first investment property is considered \$0, not negative value of \$10,000.

The second investment property is valued at \$200,000. The debt that is owed on the property is \$100,000.

- (Value of Property) minus (Debt Owed on Property) = net worth
- $\$200,000 - \$100,000 = \$100,000$

The net worth of this second investment property is \$100,000.

If the net worth of the first investment property is \$0 and the net worth of the second investment property is \$100,000, then the amount to be reported for both properties is \$100,000.

If the net worth is:

Net worth value	Enter
Ten million or more	9999999
Zero or less than zero	0

Round to the nearest dollar and do not include commas or decimal points.

A business and / or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and / or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Business value does not include the value of a small business if your family owns and controls more than 50% of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you such as a parent, sister, or cousin or (2) persons who are or were related to you by marriage such as a spouse, stepparent, or sister-in-law.

For more information about reporting investments, call the Federal Student Aid Information Center 1-800-4-FED-AID (1-800-433-3243).

Question 93a: Parents Education Credits (What were your parents' total education credits?)

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, enter the total amount of education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) your parents received in 2015.

If your parents filed a:

IRS Form	Use Line
1040	50
1040A	33

If your parents filed separate tax returns, use the table below to calculate their total education credits.

If one parent filed a...	...and the other parent filed a...	Then enter the following:
1040	1040	Add line 50 from both tax returns and enter the total amount
1040	1040A	Add line 50 from the 1040 and line 33 from the 1040A and enter the total amount
1040A	1040A	Add line 33 from both tax returns and enter the total amount

If one or both parents will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 93b: Parents' Child Support Paid (How much total child support did your parents pay?)

Enter the total amount of child support your parents paid in 2015 because of divorce or separation or as a result of a legal requirement. Do not include child support paid for children in your parents' household.

Round to the nearest dollar and do not include commas or decimal points.

Question 93c: Parents' Taxable Earnings from Need-based Employment Programs (What were your parents' taxable earnings from need-based employment programs?)

Enter the total amount of taxable earnings your parents received in 2015 from Federal Work-study or other need-based work programs such as fellowships and assistantships.

Federal Work-study is income earned from work. This income should appear on your parents' W-2 form and should be reported as wages, whether or not your parent is a tax filer. Do not worry about the fact that you are reporting work-study income in both places. The amounts from the Parents' Additional Financial Information fields are treated differently in the EFC calculation, and your parents will not be penalized.

Round to the nearest dollar and do not include commas or decimal points.

Question 93d: Parents' College Grant and Scholarship Aid Reported in AGI (How much taxable college grant or scholarship aid did your parents receive?)

Enter the total amount of college grant and scholarship aid reported to the IRS as part of your parents' adjusted gross income (AGI) in 2015.

Student aid types to report as part of the AGI may include:

- Grants
- Scholarships
- Waivers / Remissions
- Fellowships / Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or child care payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued during the parents' AmeriCorps term of service)

Round to the nearest dollar and do not include commas or decimal points.

Question 93e: Parents' Taxable Combat Pay Reported in AGI (How much combat pay or special combat pay did your parents report in their AGI?)

Enter the total amount of taxable combat pay or special combat pay that your parents received in 2015. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q.

Round to the nearest dollar and do not include commas or decimal points.

Question 93f: Parents’ Cooperative Education Earnings (What were your parents’ earnings from work under a Cooperative Education Program offered by a college?)

Enter the total amount of income your parents earned from work under a cooperative education program offered by a college in 2015.

Round to the nearest dollar and do not include commas or decimal points.

Question 94a: Parents’ Payments to Tax-Deferred Pensions and Retirement Savings (What were your parents’ total tax-deferred pension payments?)

Enter the total amount your parents paid to their tax-deferred pension and retirement savings plans (paid directly or withheld from their earnings) in 2015. These amounts are reported on the W-2 form in boxes 12a through 12d, codes D, E, F, G, H, and S. Don’t include amounts reported in code DD (employer contributions toward employee health benefits).

Round to the nearest dollar and do not include commas or decimal points.

Question 94b: Parents’ Deductible Payments to IRA / Keogh / Other (How much did your parents pay to their IRA or Keogh?)

If your parent uses the IRS Data Retrieval Tool and transfers his/her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.”

If the answer to this question is not pre-filled, enter the total amount of your parents’ IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans in 2015.

IRA/Keogh/SEP/SIMPLE payments can be found on:

- IRS Form 1040 – Use Lines: 28 + 32
- IRS Form 1040A – Use Line: 17

If your parents filed separate tax returns, use the table below to calculate their total IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans.

If one parent filed a...	...and the other parent filed a...	Then enter the following:
1040	1040	Add lines 28 + 32 from both tax returns and enter the total amount
1040	1040A	Add lines 28 + 32 from the 1040 and line 17 from the 1040A and enter the total amount
1040A	1040A	Add line 17 from both tax returns and enter the total amount

If one or both parents will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 94c: Parents' Child Support Received (How much total child support did your parents receive?)

Enter the total amount of child support your parents received in 2015 for all children in their household.

Round to the nearest dollar and do not include commas or decimal points.

Question 94d: Parents' Tax Exempt Interest Income (What was your parents' total tax-exempt interest income?)

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, enter the total amount of tax-exempt interest income your parents earned in 2015. If your parents filed:

- IRS Form 1040 – Use Line: 8b
- IRS Form 1040A – Use Line: 8b

If your parents filed separate tax returns, add line 8b from both tax returns and enter the total amount.

Note: The line numbers above are from the Internal Revenue Service tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 94e: Parents' Total Untaxed Portions of IRA Distributions (What were your parents' total untaxed portions of IRA distributions?)

If your parent uses the IRS Data Retrieval Tool and transfers his/her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS." You must subtract rollover amounts from the total.

If the answer to this question is not pre-filled, enter the total amount of the untaxed portions of IRS distributions your parents received in 2015. If the total is a negative amount, enter a zero (0).

If your parents filed:

- IRS Form 1040 – Use Lines: 15a minus 15b, and subtract rollover amounts from the total.
- IRS Form 1040A – Use Lines: 11a minus 11b, and subtract rollover amounts from the total.

If your parents filed separate tax returns, use the table below to calculate their total untaxed portions of IRA distributions.

If one parent filed a...	...and the other parent filed a...	Then enter the following:
1040	1040	Subtract the total of lines 15b from the total of lines 15a. Then subtract all rollover amounts from the remainder.
1040	1040A	For the 1040 - Subtract line 15b from line 15a, then subtract all rollover amounts from the remainder. For the 1040A - Subtract line 11b from line 11a, then subtract all rollover amounts from the remainder. Add the total remainders from the 1040 and 1040A and enter this amount.
1040A	1040A	Subtract the total of lines 11b from the total of lines 11a. Then subtract all rollover amounts from the remainder.

If one or both parents will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 94f: Parents’ Untaxed Portions of Pensions (What were your parents’ total untaxed portions of pensions?)

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as “Transferred from the IRS.” You must subtract rollover amounts from the total.

If the answer to this question is not pre-filled, enter the total amount of untaxed portions of your parents’ pensions earned in 2015. If the total is a negative amount, enter a zero (0).

If your parents filed:

- IRS Form 1040 – Use Lines: 16a minus 16b, and subtract rollover amounts from the total.

- IRS Form 1040A – Use Lines: 12a minus 12b, and subtract rollover amounts from the total.

If your parents filed separate tax returns, use the table below to calculate their total untaxed portions of IRA distributions.

If one parent filed a...	...and the other parent filed a...	Then enter the following:
1040	1040	Subtract the total of lines 16b from the total of lines 16a. Then subtract all rollover amounts from the remainder.
1040	1040A	For the 1040 - Subtract line 16b from line 16a, then subtract all rollover amounts from the remainder. For the 1040A - Subtract line 12b from line 12a. Then subtract all rollover amounts from the remainder. Add the total remainders from the 1040 and 1040A and enter this amount.
1040A	1040A	Subtract the total of lines 12b from the total of lines 12a. Then subtract all rollover amounts from the remainder.

If one or both parents will file a federal tax return, but have not yet filed, estimate the amount that will appear in the lines noted in the table above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Round to the nearest dollar and do not include commas or decimal points.

Question 94g: Parents’ Housing, Food, and Living Allowances (What were your parents’ total allowances received?)

Enter the total cash value of housing, food, and any other living allowances your parents received in 2015. These allowances are often paid to military, clergy and others.

Do not include rent subsidies for low-income housing, the value of on-base military housing or the value of a basic military allowance for housing.

Round to the nearest dollar and do not include commas or decimal points.

Question 94h: Parents’ Veterans Noneducation Benefits (What were your parents’ total veterans noneducation benefits?)

Enter the total amount of veterans noneducation benefits received by your parents in 2015. Veterans noneducation benefits include Disability, Death Pension, Dependency and Indemnity Compensation (DIC), and / or VA Educational Work-Study allowances.

Do not include veterans educational benefits such as the:

- Montgomery GI Bill
- Dependents Education Assistance Program
- VA Vocational Rehabilitation Program
- VEAP Benefits
- Post-9 / 11 GI Bill

Round to the nearest dollar and do not include commas or decimal points.

Question 94i: Parents’ Other Untaxed Income or Benefits (What was the total of your parents’ other untaxed income or benefits?)

Enter the total amount of any other untaxed income or benefits, such as workers compensation, Black Lung Benefits, untaxed portions of Railroad Retirement Benefits, disability benefits, etc. that your parents received in 2015. Also include the untaxed portions of health savings accounts from IRS Form 1040 – line 25.

Do not include extended foster care benefits, student aid, earned income credit, child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

Round to the nearest dollar and do not include commas or decimal points.

Overview for Questions 95-102 (Independent Students)

Purpose: If you answered “Yes” to any of the dependency questions (46–58), you will need to respond to questions 95–102. The number of family members you report determines the allowance that will be subtracted from your family’s income to provide for basic living expenses when the U.S. Department of Education’s processor calculates your Expected Family Contribution. The number of family members in college directly affects your family’s ability to contribute to your education costs.

Question 95: Student’s Number of Family Members in 2017–18 (Your number of family members in 2017-2018 (household size))

To determine your household size, include:

- yourself (and if married, your spouse);
- the number of children (even if they do not live with you) who will receive more than half of their support from you (and if married, your spouse) between July 1, 2017 and June 30, 2018. You may include any unborn children if they will be born during the school year; and

- the number of people (not your children or spouse) who live with you and receive more than half of their support from you, and will continue to receive more than half of their support from you between July 1, 2017 and June 30, 2018.

Question 96: Student’s Number in College in 2017–18 (How many people in your household will be in college in 2017-2018?)

You must enter the number of people in your household who will attend college between July 1, 2017 and June 30, 2018.

Include:

- Yourself even if you will attend college less than half-time in 2017–2018.
- Other people in your household only if they will attend college at least half-time in 2017–18, in a program that leads to a college degree or certificate.

Do not include:

- Students at a U.S. service academy, because most of their primary educational expenses are paid for by the federal government.

Questions 97–101: Students Received Medicaid, Supplemental Security Income (SSI), Supplemental Nutrition Assistance Program (SNAP), Free or Reduced Price School Lunch, Temporary Assistance for Needy Families (TANF), Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

Select the appropriate check box if you or anyone in your household received any of the following during 2015 or 2016:

- Medicaid
- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program (SNAP)
- Free or Reduced Price School Lunch
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

Check None of the above if none of these benefits were received during 2015 or 2016.

Note: Family assistance programs such as SNAP and/or TANF might have different names in your parents’ state. Also, answering this question will not reduce your eligibility for federal student aid or your eligibility for these federal benefits.

Question 102: Is Student or Spouse a Dislocated Worker (Are you or your spouse a dislocated worker?)

In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster;
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of relocating due to permanent change in duty station;
- is the spouse of an active duty member of the Armed Forces and is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment; or
- is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (for example: a stay-at-home mom or dad), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.

Except for the spouse of an active duty member of the Armed Forces, if a person quits work, generally he or she is not considered a dislocated worker even if, for example, the person is receiving unemployment benefits.

- Select Yes if you or your spouse is a dislocated worker.
- Select No if neither you nor your spouse is a dislocated worker.
- Select Don't know if you are not sure whether you or your spouse is a dislocated worker. You may contact the financial aid administrator at your college if you need help answering this question.

Note: If you answer Yes, the financial aid administrator at your college may require proof that you or your spouse is a dislocated worker.

Overview for Question 103

Purpose: Provide the schools you are interested in attending. These schools will be sent your FAFSA information in order to determine your eligibility for financial aid at each school.

Question 103a, 103c, 103e, 103g: Federal School Code

A Federal School Code is always six characters, beginning with 0 (zero), G, B, or E and ending with a five-digit number. For example, 003223 is the Federal School Code for the University of Oregon.

Enter the Federal School Code for the college you're interested in attending and click Search. If a match is found it will display in the Search Results table. If the college you were looking for displays, click Add to add it to your list of Selected Schools.

If you don't know the Federal School Code, you can instead search for the college by selecting the state, and entering the college's name and /or city.

Question 103b, 103d, 103f, 103h: Housing Plans

For each school listed, select a housing plan in the Housing Plans column.

- Select On Campus if you intend to have on-campus housing.
- Select With Parent if you intend to live with your parent(s).
- Select Off Campus if you intend to live off campus, but not with your parent(s).

Overview for Questions 104–108

Purpose: Provide the date the FAFSA was completed and your signature. If you are a dependent student, then your parent will need to sign as well. If you paid someone for assistance with completing the FAFSA, then that person also must provide information.

Question 104: Date this form was completed.

Question 105: Student and Parent signature

Question 106: Preparer's Social Security Number

A preparer is anyone who charges a fee for helping you fill out your FAFSA. If a fee was paid to someone for advice or for completing this form, that person must complete this section.

Typically high school counselors, school financial aid administrators, or other mentors do not charge a fee to help you complete your application, so they are not considered preparers unless you paid them for their services.

Because you indicated you are a professional preparer who completed a FAFSA for a student, you should enter:

- your Social Security Number or
- your company's Employer Identification Number (EIN). Be sure to enter the EIN that was issued by the Internal Revenue Service.

Question 107: Preparer's Employer Identification Number

Because you indicated you are a professional preparer who completed a FAFSA for a student, you should enter:

- your Social Security Number or
- your company's Employer Identification Number (EIN). Be sure to enter the EIN that was issued by the Internal Revenue Service.

Question 108: Preparer's Signature and Date