

# FAFSA® Checklist

## About the FAFSA

The Free Application for Federal Student Aid (FAFSA®) is the first step in the financial aid process. It is used to apply for federal student aid, such as grants, loans, and work-study. In Pennsylvania, information from the FAFSA is also used to determine student eligibility for the PA State Grant.

The FAFSA asks for information about you and your financial situation. If you're married, you will need the same information for your spouse. **If you're considered a dependent student, you will need your parents' information, too.**

## Before filing the FAFSA, gather the following items:

- Your Federal Student Aid account username and password (FSA ID)

**Note:** This may take time to process, so we recommend you create your account several days prior to filing the FAFSA.

Visit [studentaid.gov](https://studentaid.gov) to create your account.

- Your Social Security number
- Your driver's license number, if you have one (optional)
- Your Alien registration number, if you are not a U.S. citizen
- Your W-2 Forms
- Records of untaxed income received, including workers' compensation, child support, payments to tax-deferred pension, savings plans, etc.

- Your federal income tax return 1040 and accompanying schedules

**Note:** If you complete your FAFSA online, you have the option of automatically retrieving your income and tax data from the Internal Revenue Service (IRS) and having it transferred into your FAFSA. The IRS Data Retrieval Tool (DRT) is the preferred method to complete the FAFSA.

- Your current bank statements and records of stocks, bonds, 529 plans, and other investments including real estate (but not including the home in which you live) and business and farm assets
- A personal email address (not a school email address)

**Now you're ready... Visit [studentaid.gov](https://studentaid.gov) to file for FREE!**

## Need additional help?

Need help with more than just the FAFSA? There are plenty of FREE resources available to help you with the financial aid process:

[PHEAA.org](https://phea.org) | [studentaid.gov](https://studentaid.gov) | [collegecost.ed.gov](https://collegecost.ed.gov)