



WV GEAR UP Program Meeting

Thursday, Sept. 11, 2025





Welcome and Program Updates

Jason Luyster, Senior Director of Student Services

GEAR UP Program Updates

Contingency planning for GEAR UP GAN

- County grant agreements
- Site Coordinator contracts
- Technology bundle orders
- Upcoming GEAR UP programs:
 - Mentor Summit – October 1st
 - Student Voice Forum – November 18th-19th
 - Technology Training Date – December 9th



Invoices and Fiscal Guidance

Joanne Rutherford, Coordinator of Fiscal and Administrative Services

Fiscal Overview

- Site Coordinator invoices have been pre-populated to include your Vendor Number, Name, Address, County, School, Dates of Service, GAE Number, Invoice Amount and Invoice Number. These need to be signed in blue ink. Your signature is to match your printed name as it appears at the top of the invoice and dated for the end of each month.
- Please sign these and return to your Regional Director. All invoices will be submitted for payment with your timesheet for the month.
- For purchasing purposes, our Policy and Procedure Manual is located on the WVGEARUP website. Remember to follow your county fiscal policies and procedures and communicate with your Principal, County Coordinator and/or Treasurer.

Cumulative Classroom Enhancements

- GU Tech stickers/labels are available for each County. We must keep a record of these items for auditing purposes. We will be sending a spreadsheet soon to identify all GU Tech items. You are required to keep an inventory of ALL Tech items to include:

- Receipt Date
- Vendor Name
- Product Names
- Model/Serial Number



FAFSA Line-By-Line

Michelle Marlow, Program Administrator, Division of Financial Aid

StudentAid.gov Account

Create an Account

Whether you're a student, parent, or borrower, you'll need to create your own account to apply for, receive, and manage your federal student aid.

[Get Started](#)

Already have an account? [Log In](#)

What You Can Do With Your Account

You must have an account to do the following:

- Fill out the *Free Application for Federal Student Aid (FAFSA®)* form online
- Complete other online forms (such as the *Master Promissory Note*) required to receive aid
- Review the federal student aid you've received

What You'll Need

- Your Social Security number (if applicable)
- Your own email address

- Used for FAFSA completion and access to certain U.S. Department of Education websites
- Student and parent must create own StudentAid.gov Account (formerly FSA ID)
- May be used throughout financial aid process, including subsequent school years
- Only the owner should create an StudentAid.gov Account

StudentAid.gov Account

- What you will need to create an account:



Phone



Email



Social Security Number



Address

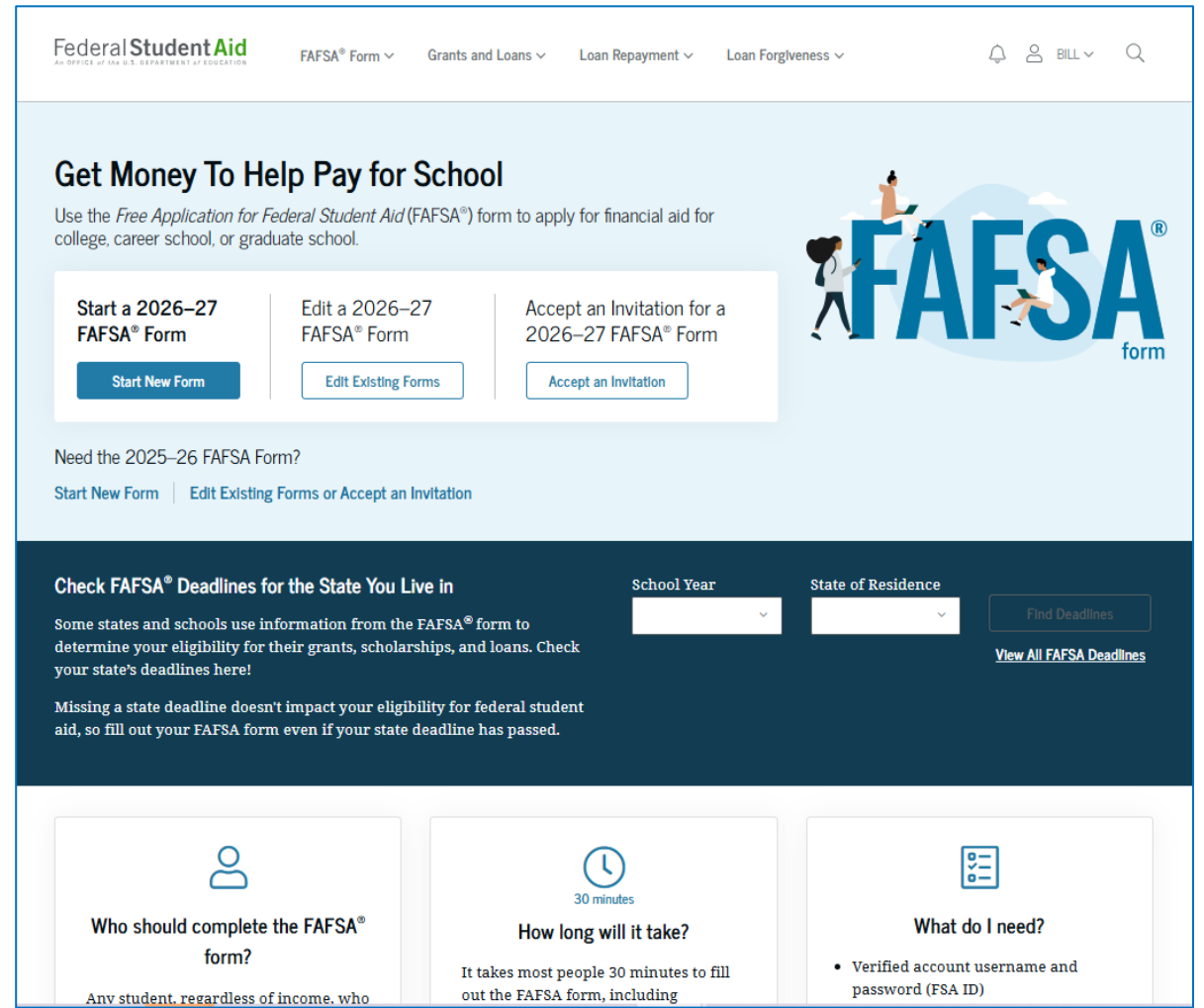
- There is a process for students and parents without an SSN to create an account.
- Real-time Authentication - Can use account immediately to complete and sign the FAFSA form.

FAFSA Log In

The main FAFSA landing page:

- Start New Form
- Edit Existing Forms
- Accept an Invitation*

* Accept an Invitation is new for the 2026-2027 FAFSA cycle as part of the new contributor invitation process.



The screenshot shows the FAFSA landing page with the following elements:

- Header:** Federal Student Aid logo, navigation links for FAFSA Form, Grants and Loans, Loan Repayment, and Loan Forgiveness, and a search icon.
- Main Section:** "Get Money To Help Pay for School" with a description of the FAFSA form and three buttons: "Start New Form", "Edit Existing Forms", and "Accept an Invitation".
- Right Side:** Large "FAFSA form" logo with an illustration of students.
- Check Deadlines Section:** "Check FAFSA® Deadlines for the State You Live in" with dropdowns for "School Year" and "State of Residence", a "Find Deadlines" button, and a link to "View All FAFSA Deadlines".
- Footer Section:** Three boxes with icons and text: "Who should complete the FAFSA® form?" (Any student, regardless of income, who), "How long will it take?" (30 minutes, It takes most people 30 minutes to fill out the FAFSA form, including), and "What do I need?" (Verified account username and password (FSA ID)).



Student Log In

- Either Student or Parent can start their portion of the FAFSA.
- If student or parent receives an invitation code they can enter it here.
- Recommended the student start the FAFSA.

FAFSA[®] FORM 2026-27

Welcome, Alex,
to the FAFSA[®] Form

I am starting the FAFSA form as a

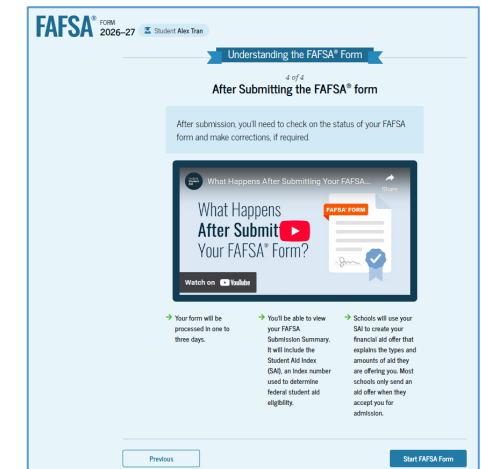
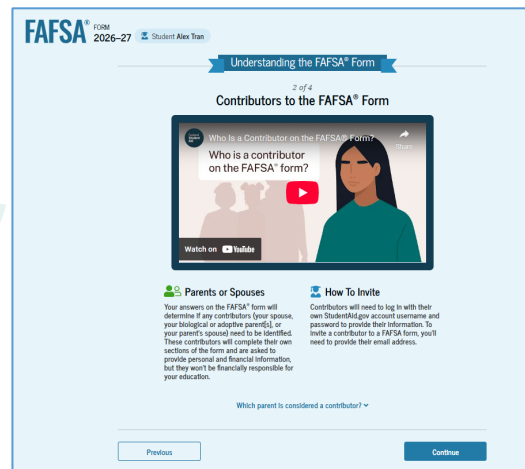
☐ Student  ☐ Parent 

Did you receive an invitation code?
[Enter Code](#)

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

Student Onboarding and Identity Information

- There will be 4 screens of onboarding information
 - What is the FAFSA?
 - Contributors to the FAFSA Form
 - What to Expect
 - After Submitting the FAFSA Form
- Student will then verify the personal information is correct and update, if needed.



Student Consent and Approval

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

Provide Consent and Approval or You Won't Be Eligible for Federal Student Aid

Summary

Your consent and approval are needed to retrieve and disclose federal tax information. With your consent and approval, we can obtain tax return information automatically from the IRS to help you complete the FAFSA® form. If you don't provide consent and approval, you will not be eligible for federal student aid, including grants and loans. You must provide consent and approval even if you didn't file a U.S. federal tax return or any tax return.

- Get your 2024 tax return information for the 2026-27 FAFSA form.
- Federal tax information is used to determine your eligibility for federal student aid.
- Tax return information is required to complete the FAFSA form.

By accepting below, I consent to the disclosure of information about me, and affirmatively approve of

- the receipt and use of my federal tax information, and
- the redisclosure of my federal tax information by the U.S. Department of Education (ED), as described herein.


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

1. ED may disclose my Social Security number/Individual Taxpayer Identification Number, last name, date of birth, unique identifier, the tax year for which federal tax information is required, and the date and timestamp of my approval for the use of my federal tax information in determining eligibility by ED for which approval is provided to the U.S. Department of the Treasury, Internal Revenue Service (IRS). I understand that in response to such a request from ED, the IRS shall then disclose my federal tax information to "authorized persons" (i.e., specifically designated officers and employees of ED and its contractors [as defined in 26 U.S.C. § 6103(l)(13)(E)]) for the purpose of determining eligibility for and the amount of federal student aid under a program authorized under subpart 1 of part A, part C, or part D of *Title IV of the Higher Education Act of 1965*, as amended, for myself or an applicant for federal student aid who has requested that I share my federal tax information on their *Free Application for Federal Student Aid (FAFSA®)* form.

- Allows for the individual's **2024** FTI to be directly transferred from the IRS to the FAFSA.
- Consent is required by all contributors on the FAFSA for the student to be eligible for aid.
- IRS transfers information to populate the FAFSA income questions for most tax filers.
- Eliminates manual entry of tax and income information.

Student Consent and Approval

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

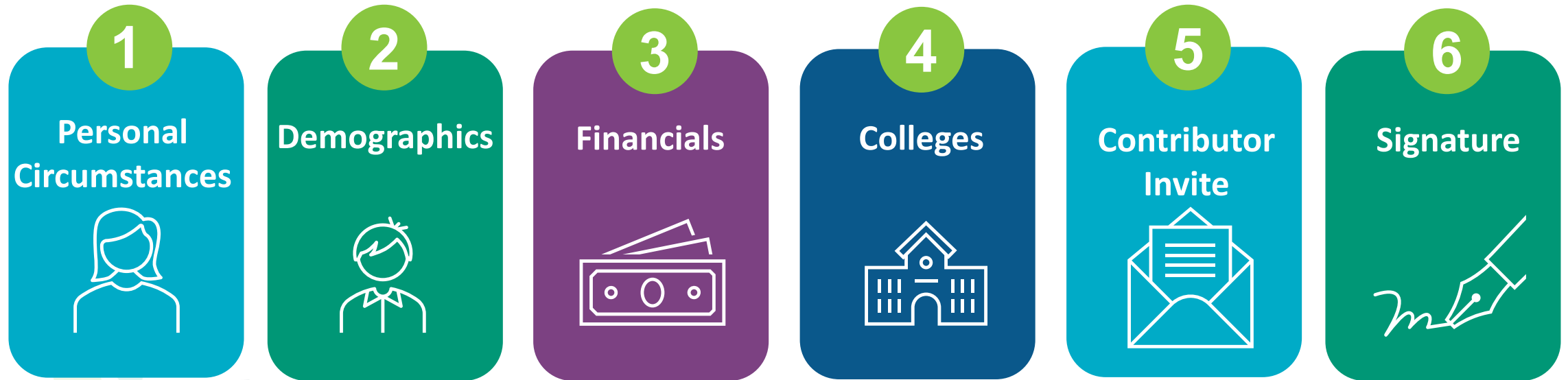


We're securely importing your information.


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

Loading...

Student Sections



Student Personal Circumstances


FAFSA[®] FORM 2026–27  Student Alex Tran

Your Personal Circumstances

We'll ask you questions that help us determine your eligibility for federal student aid. This information can affect the types of federal student aid you're eligible to receive.

→ Sometimes we need to collect information from other people depending on answers in this section. We'll let you know if this is the case.

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



Student College or Career School Plans

The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. The progress bar at the top indicates the following steps: 1. Personal Circumstances (current), 2. Demographics, 3. Financials, 4. Colleges, 5. Contributor Invite, and 6. Signature. The main heading is "Student College or Career School Plans". The first question is "When the student begins the 2026-27 school year, what will their college grade level be?". There are four radio button options: "First year (freshman)" (selected), "Second year (sophomore)", "Other undergraduate (junior and beyond)", and "Master's, doctorate, or graduate certificate program (such as M.A., MBA, M.D., J.D., Ph.D., Ed.D., etc.)". The second question is "When the student begins the 2026-27 school year, will they already have their first bachelor's degree?". There are two radio button options: "Yes" and "No" (selected). At the bottom, there are "Previous" and "Continue" buttons.

College grade level

- First year (freshman)
 - Student has never been admitted as a degree-seeking student at an institution.
 - Even if they have enrolled in dual credit courses or have earned college credits.
 - Promise Scholarship eligibility for high school seniors.

Student Personal Circumstances

The screenshot shows the FAFSA 2026-27 form for Student Alex Tran. The progress bar at the top indicates the following steps: 1. Personal Circumstances (current), 2. Demographics, 3. Financials, 4. Colleges, 5. Contributor Invite, and 6. Signature. The 'Student Personal Circumstances' section is titled and includes the instruction 'Select all that apply or "None of these apply."'. There are eight checkboxes with corresponding questions, each with a help icon (i):

- ☐ The student is currently serving on active duty in the U.S. armed forces for purposes other than training. (i)
- ☐ The student is a veteran of the U.S. armed forces. (i)
- ☐ The student has children or other people (excluding their spouse) who live with them and receive more than half of their support from the student now and between July 1, 2026, and June 30, 2027. (i)
- ☐ At any time since the student turned 13, they were an orphan (no living biological or adoptive parent). (i)
- ☐ At any time since the student turned 13, they were a ward of the court. (i)
- ☐ At any time since the student turned 13, they were in foster care. (i)
- ☐ The student is or was a legally emancipated minor, as determined by a court in their state of residence. (i)
- ☐ The student is or was in a legal guardianship with someone other than their parent or stepparent, as determined by a court in their state of residence. (i)

The final option, ☒ None of these apply., is selected. At the bottom of the form, there are 'Previous' and 'Continue' buttons.

Questions will include:

- Marital Status
- College or Career School Plans
 - College grade level
 - Have first bachelor's degree
- Personal Circumstances
 - Dependency Questions
- Homelessness Status

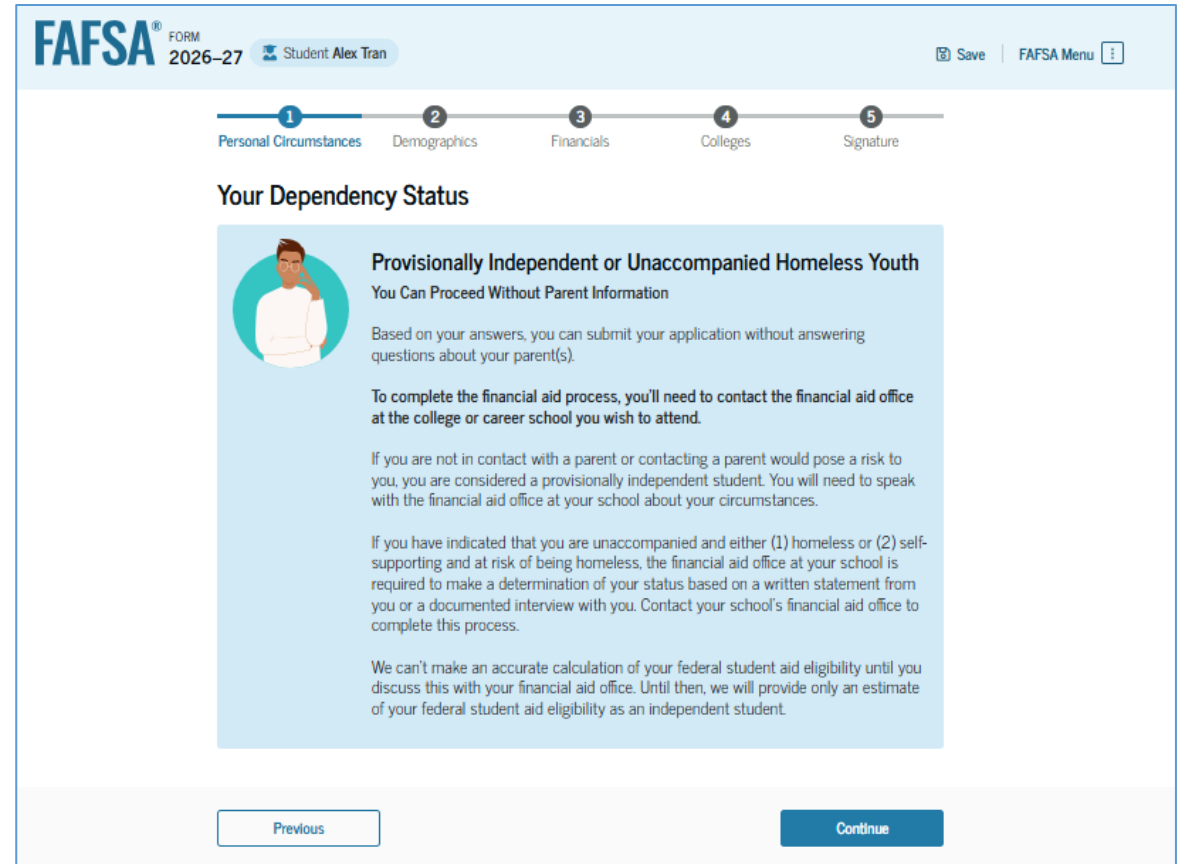
Student Unusual Circumstances

The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. The progress bar at the top indicates the following steps: 1. Personal Circumstances (current), 2. Demographics, 3. Financials, 4. Colleges, 5. Contributor Invite, and 6. Signature. The 'Student Unusual Circumstances' section is highlighted. A green box contains the text: 'This information will help us evaluate the student's ability to pay for school.' Below this, a question is posed: 'Do unusual circumstances prevent the student from contacting their parents or would contacting their parents pose a risk to the student?'. A list of examples follows: 'A student may be experiencing unusual circumstances if they' • left home due to an abusive or threatening environment; • are abandoned by or estranged from their parents; • have refugee or asylee status and are separated from their parents, or their parents are displaced in a foreign country; • are a victim of human trafficking; • are incarcerated, or their parents are incarcerated, and contact with the parents would pose a risk to the student; or • are otherwise unable to contact or locate their parents. A note states: 'If the student's circumstances resulted in not having a safe and stable place to live, they may be considered a homeless youth and should review the answer to the previous question about being unaccompanied and homeless.' At the bottom, there are two radio button options: 'Yes' (unselected) and 'No' (selected). 'Previous' and 'Continue' buttons are at the bottom of the form.

- Student Unusual circumstances would prevent a dependent student from contact the student's parents or contacting their parents would pose a risk to the student.
- Does NOT include the parent's unwillingness to provide information for the FAFSA.

Provisionally Independent Status

- If student answers “Yes” then they are considered “provisionally independent”
- The student can sign and submit their form and is not required to provide parent information
- A financial aid administrator at the school will review and make a determination about a dependency override.
- Schools may require additional documentation



The screenshot displays the FAFSA 2026-27 application interface for Student Alex Tran. The progress bar at the top indicates five steps: 1. Personal Circumstances (active), 2. Demographics, 3. Financials, 4. Colleges, and 5. Signature. The main heading is 'Your Dependency Status'. Below this, a blue box contains the title 'Provisionally Independent or Unaccompanied Homeless Youth You Can Proceed Without Parent Information' and an icon of a person on the phone. The text explains that based on the student's answers, they can submit the application without providing parent information. It further states that to complete the financial aid process, the student must contact the financial aid office at the college or career school. The text also mentions that if the student is not in contact with a parent or if contacting a parent poses a risk, they are considered a provisionally independent student. Additionally, it notes that if the student is unaccompanied and either homeless or self-supporting and at risk of being homeless, the financial aid office is required to make a determination of their status based on a written statement or a documented interview. Finally, it states that an accurate calculation of federal student aid eligibility cannot be made until the student discusses this with their financial aid office, and until then, an estimate of eligibility as an independent student will be provided. At the bottom of the form, there are 'Previous' and 'Continue' buttons.

Student Unsubsidized Loan Only

- The student is asked if a financial aid administrator should determine their eligibility for a Direct Unsubsidized Loan only.
- This is an option if the student's parents are unwilling to provide information.
- Answer is defaulted to "No"
- If the student selects "Yes," a warning will appear, and the student will not be eligible for other forms of federal and state aid.

FAFSA[®] FORM 2026-27 Student Alex Tran

Save | FAFSA Menu

1 Personal Circumstances 2 Demographics 3 Financials 4 Colleges 5 Signature

Your Dependency Status

Dependent Student
Based on your answers, you're a dependent student. This means you must provide parent information on your FAFSA[®] form. This information helps determine how much federal student aid you're eligible to receive.

Direct Unsubsidized
Are the student's parents unwilling to provide information?
This response must be "Yes" if you are a dependent student and your parents are unwilling to provide information for other types of federal student aid.

☒ Yes


Previous Continue

You WILL NOT Be Eligible for Most Federal Student Aid

By changing the answer to "Yes" you'll be considered for a limited amount of Direct Unsubsidized Loans ONLY. Any existing parent information will be removed. Do you want to continue?


Continue Return to Form

Student Demographics

FAFSA[®] FORM 2026–27  Student Alex Tran

Student Demographics

We'll ask questions about your background and family.



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

Student Demographics

- Answers will not
 - Affect the student's eligibility for federal student aid,
 - Be used in any aid calculations, or
 - Be shared with the schools to which the student applies.
- Questions include:
 - Student's gender
 - Student's race and ethnicity

Student Demographics



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

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

Student Citizenship Status ⓘ

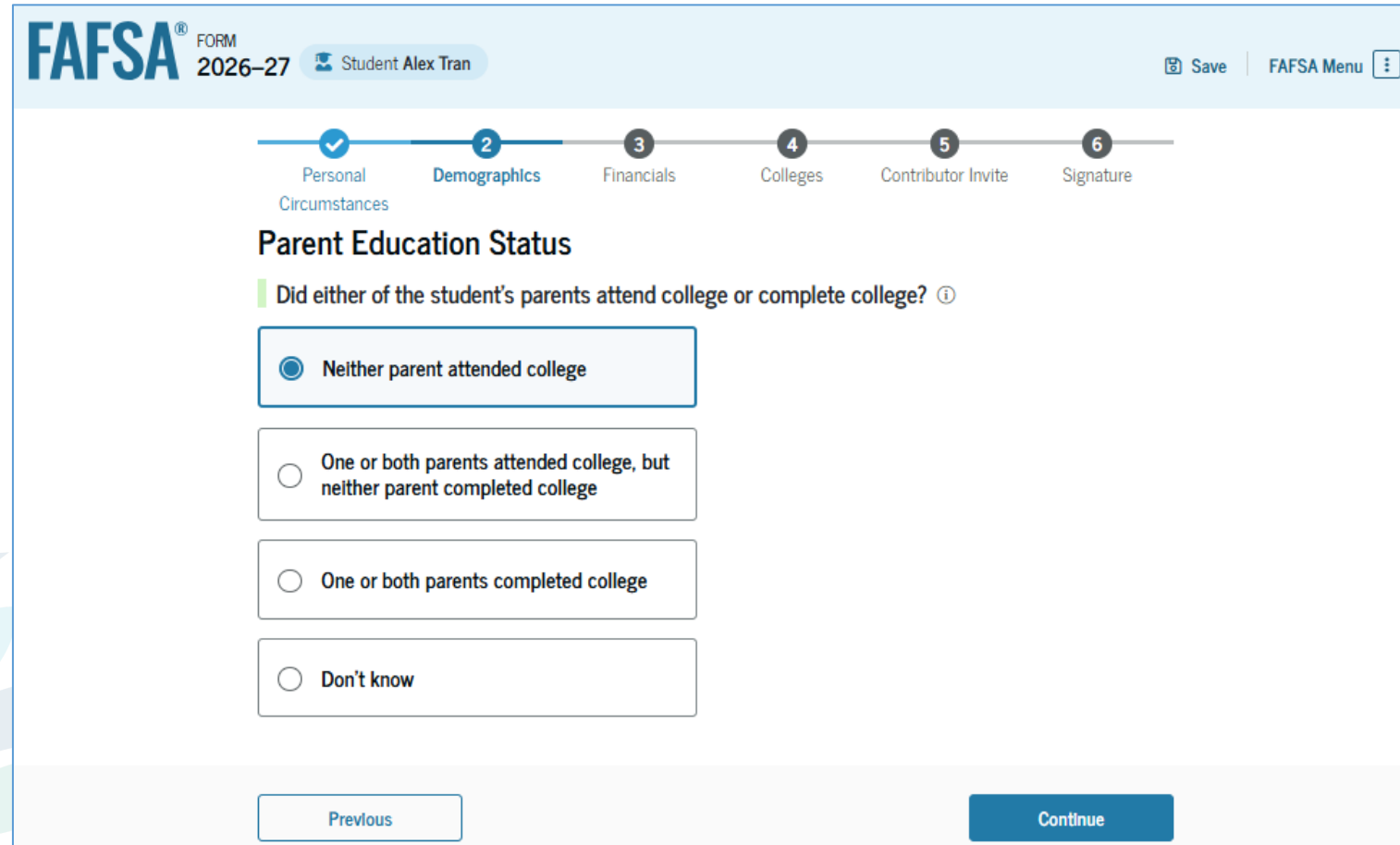
☒ U.S. citizen or national

☐ Eligible noncitizen

☐ Neither U.S. citizen nor eligible noncitizen

Previous Continue

Student Demographics



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

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

Parent Education Status

Did either of the student's parents attend college or complete college? ⓘ

☒ Neither parent attended college

☐ One or both parents attended college, but neither parent completed college

☐ One or both parents completed college

☐ Don't know

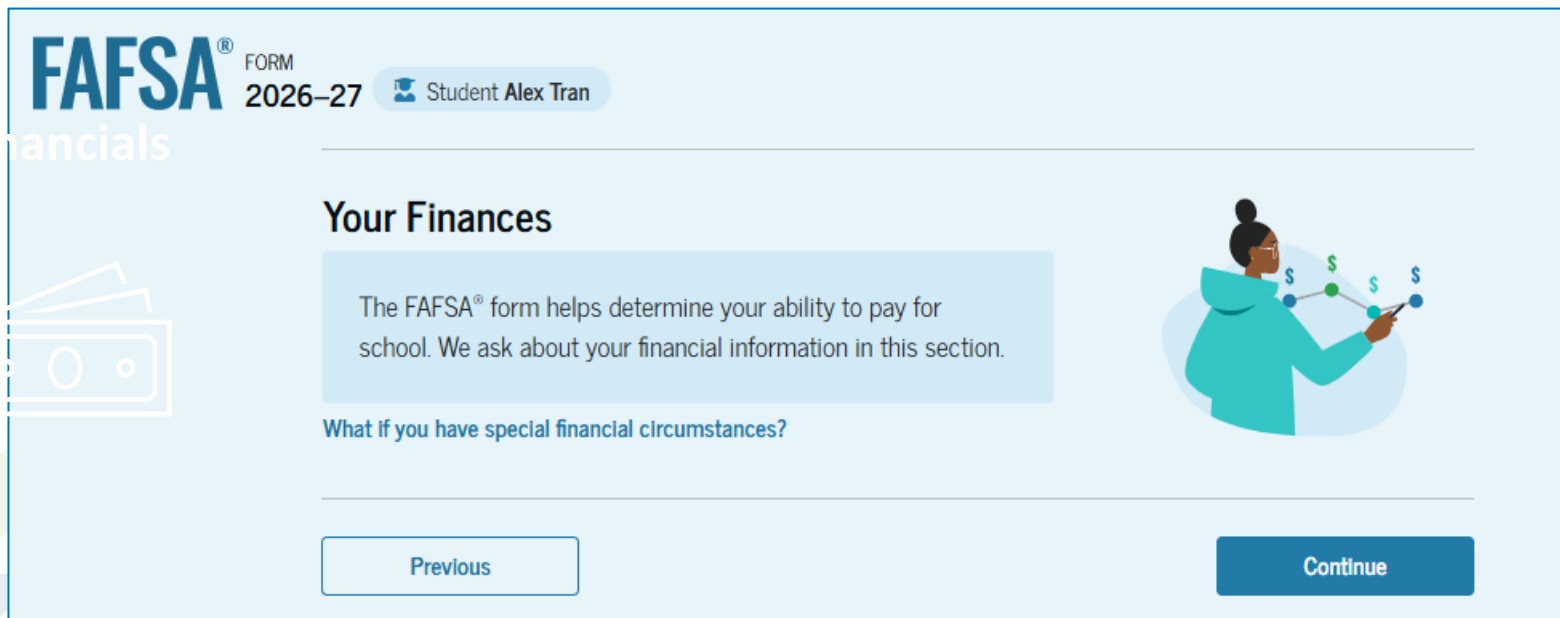
Previous Continue

Student Demographics

The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. The progress bar at the top indicates the following steps: 1. Personal Circumstances (completed), 2. Demographics (current step), 3. Financials, 4. Colleges, 5. Contributor Invite, and 6. Signature. The main heading is "Student High School Completion Status". Below it, the question is: "What will the student's high school completion status be at the beginning of the 2026-27 school year?". There are four radio button options: "High school diploma" (selected), "State-recognized high school equivalent (e.g., GED certificate)", "Homeschooled", and "None of the above". At the bottom, there are "Previous" and "Continue" buttons.

- This question is important for WV Higher Education Grant eligibility.
 - If “none of the above” is selected, student is not eligible for the grant.
- If high school diploma is selected, student will be prompted to select from which high school they did or will graduate.

Student Financials



FAFSA[®] FORM 2026-27 Student Alex Tran

Your Finances

The FAFSA[®] form helps determine your ability to pay for school. We ask about your financial information in this section.

What if you have special financial circumstances?


Previous Continue


The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. The title 'Your Finances' is prominently displayed. A light blue box contains an explanatory text about the form's purpose. Below this, a question is posed. At the bottom, there are two buttons: 'Previous' and 'Continue'. To the right of the text box, there is an illustration of a person in a teal hoodie interacting with a network of nodes and lines, with dollar signs floating around, symbolizing financial planning or data analysis.

Student Financials

- Information should be imported from granting consent for the IRS Direct Data Exchange
- Student assets
 - Cash, Savings and Checking Accounts
 - Current Net worth of Investments
 - Current Net worth of Businesses and Farms
 - ****DO NOT**** include a family business with 100 or fewer full-time employees, farms where the family resides, or a commercial fishing business and related expenses.
- Law reinstates the exemption of family farm and small business assets from the SAI calculation and expands this asset exemption to family-owned commercial fisheries, with an effective date of July 1, 2026.

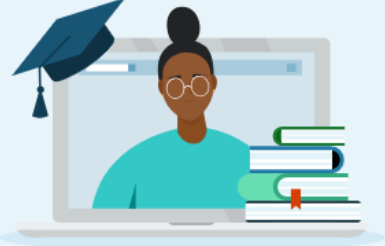
Colleges



FAFSA[®] FORM 2026–27  Student Alex Tran

Select Colleges and Career Schools

Search for and select colleges and career schools you're considering so they automatically receive an electronic copy of the FAFSA[®] form.



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

Colleges

- Can add up to 20 schools
- Can add/remove after submitting the FAFSA
- Search by
 - State
 - School Code
- Each school listed will receive the student's FAFSA information

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

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

Where should we send the FAFSA® information?
Add at least one college or career school now.

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

0 out of 20 schools selected View Selected Schools

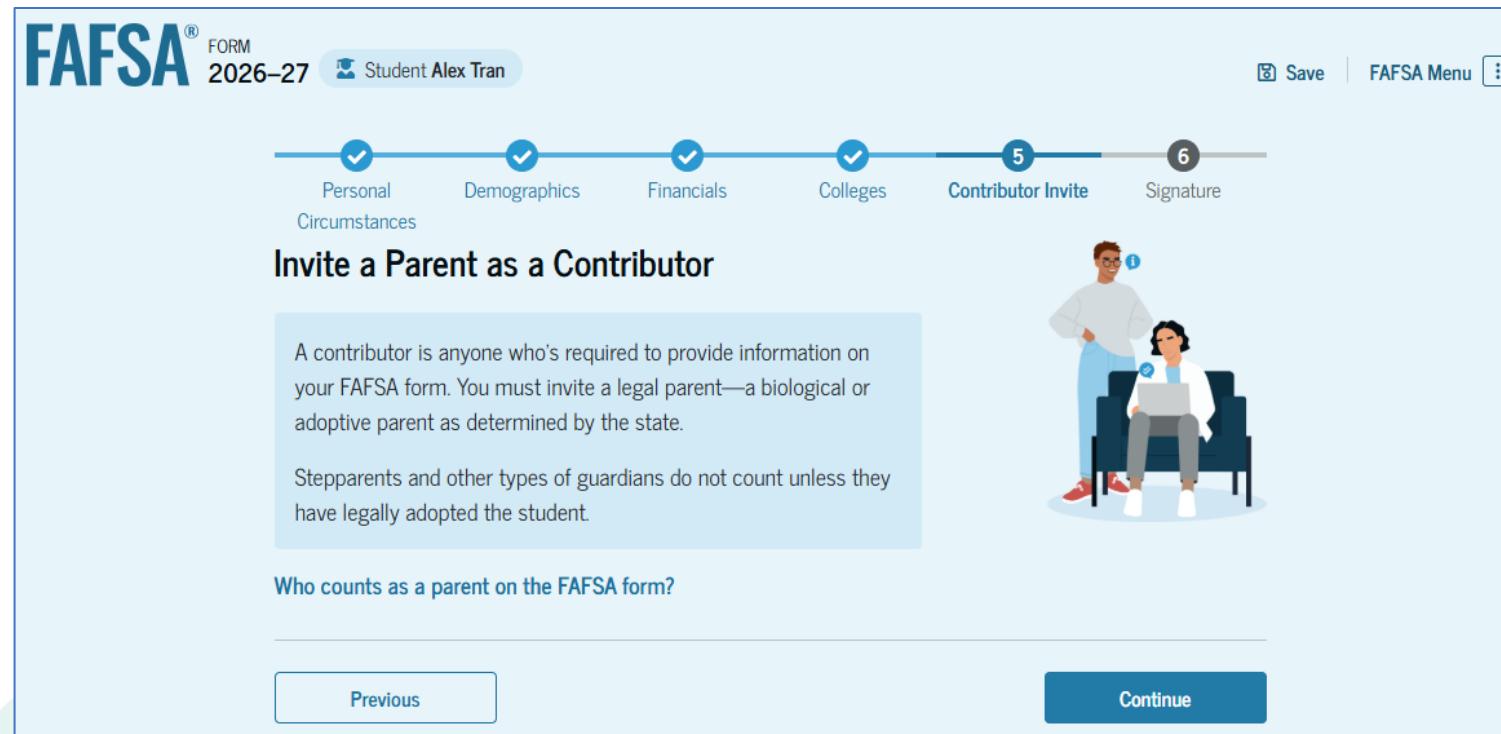
Search by State Enter School Code

California (CA)

Search

Previous Continue

Contributor Invite



The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. At the top, a progress bar indicates the current step is 5, 'Contributor Invite', with previous steps (Personal Circumstances, Demographics, Financials, Colleges) marked as complete and the next step (6, Signature) pending. The main heading is 'Invite a Parent as a Contributor'. Below this, a text box explains that a contributor is anyone required to provide information on the FAFSA form, specifically a legal parent (biological or adoptive) as determined by the state. It also notes that stepparents and other guardians do not count unless legally adopted. An illustration of a man and a woman sitting on a couch with a laptop is positioned to the right. At the bottom, the question 'Who counts as a parent on the FAFSA form?' is followed by a text input field. Navigation buttons for 'Previous' and 'Continue' are at the bottom.

FAFSA[®] FORM 2026-27 Student Alex Tran

Save | FAFSA Menu

Personal Circumstances Demographics Financials Colleges Contributor Invite Signature

Invite a Parent as a Contributor

A contributor is anyone who's required to provide information on your FAFSA form. You must invite a legal parent—a biological or adoptive parent as determined by the state.

Stepparents and other types of guardians do not count unless they have legally adopted the student.

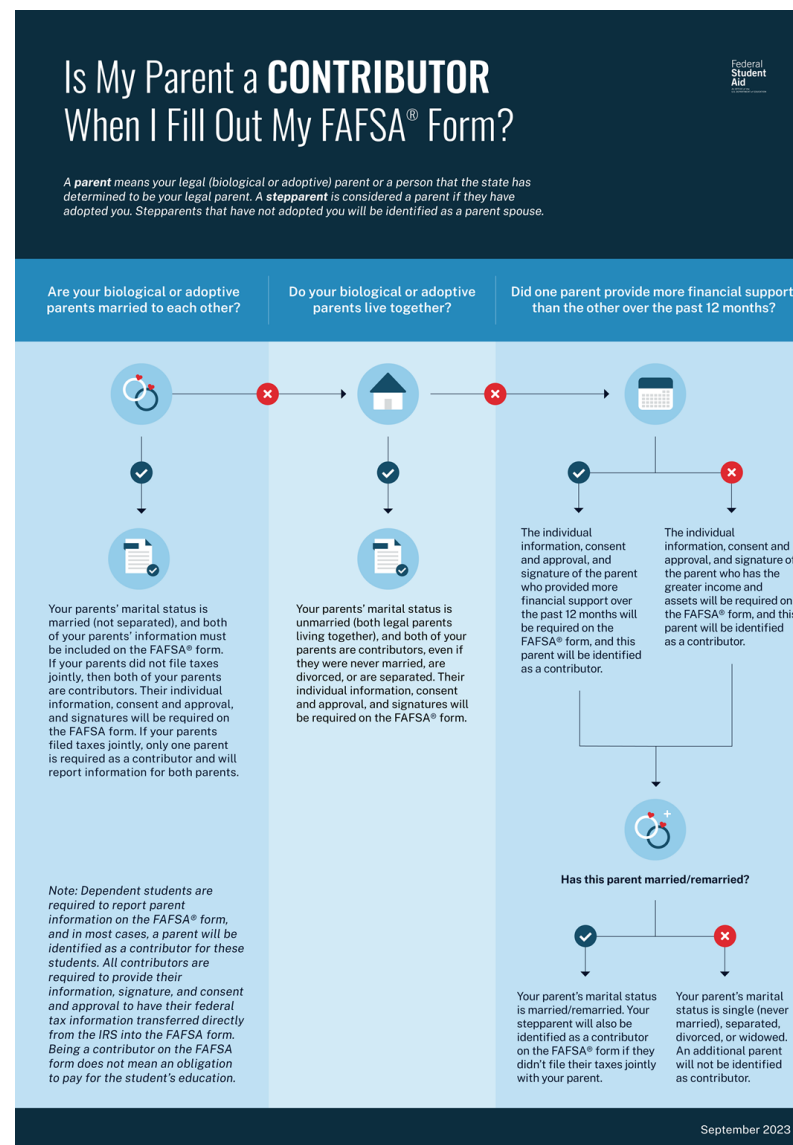
Who counts as a parent on the FAFSA form?

Previous Continue

Contributor Invite

Who is my contributor?

- Dependent Students:
 - Are your biological or adoptive parents married to each other?
 - If yes and they filed taxes jointly, invite one parent
 - If yes and they filed taxes separately, invite both parents
 - Do your biological or adoptive parents live together?
 - If yes and they are unmarried, divorced or separated, invite both parents
 - If biological or adoptive parents do not live together. Did one parent provide more financial support than the other over the last 12 months?
 - Yes - invite the parent that provided the most support
 - If married/remarried and did not file taxes together, invite parent and stepparent
 - If equal, invite the parent with the greater income and assets
 - If married/remarried and did not file taxes together, invite parent and stepparent.



Contributor Invite

New process for 2026-2027

- Student will enter email address for contributor and will select “Sent Invite”
- Student will confirm contributor email in pop-up window and will select “Send Invite” again.
- DO NOT need parent’s SSN and DOB.

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

Personal Demographics Financials Colleges **Contributor Invite** Signature

Invite Your Parent to This FAFSA[®] Form

To determine your federal student aid eligibility, we need more information on your household financial situation. You'll need to invite a contributor to provide this information.

As a dependent student, you need to invite a legal parent as a contributor. You only need to invite one parent.

Who counts as a parent on the FAFSA form?

Parent

Invite a Parent Contributor

Email

599887939test@testcod.edu

Send Invite

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

Personal Demographics Financials Colleges **Contributor Invite** Signature

Invite Your Parent to This FAFSA[®] Form

To determine your federal student aid eligibility, we need more information on your household financial situation. You'll need to invite a contributor to provide this information.

As a dependent student, you need to invite a legal parent as a contributor. You only need to invite one parent.

Who counts as a parent on the FAFSA form?

Parent

Send Invite to 599887939test@testcod.edu?

We'll send an invitation link and an access code to this email address.

Go Back Send Invite

Contributor Invite

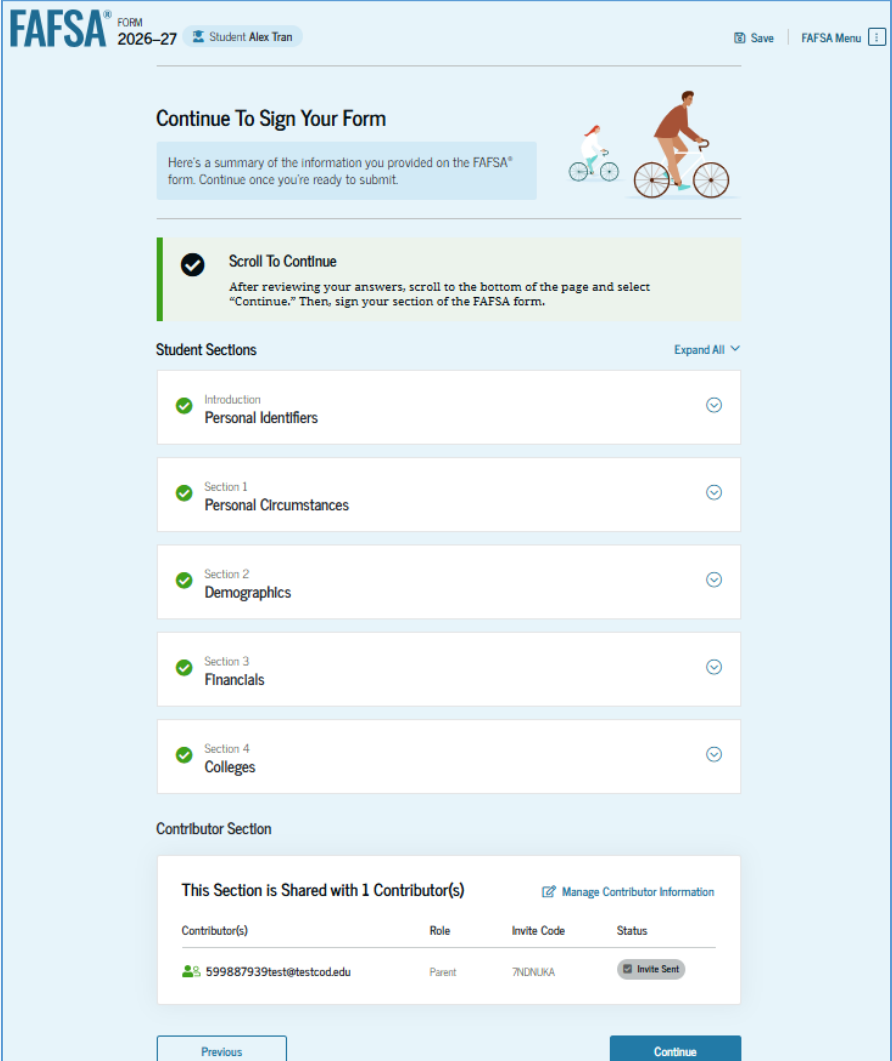
Contributor confirmation page

- Parent will receive an email inviting them to the student's FAFSA form
- Parent can access form by accepting the invitation in the email
- Student can also provide an invitation link and invitation code that can be shared directly with the parent

The screenshot shows the FAFSA 2026-27 Contributor Invite page for Student Alex Tran. The page has a light blue header with the FAFSA logo, the form year (2026-27), the student's name (Alex Tran), and buttons for 'Save' and 'FAFSA Menu'. A progress bar at the top indicates the current step is 'Contributor Invite' (step 5), with previous steps (Personal Circumstances, Demographics, Financials, Colleges) marked as complete and the next step (Signature) marked as pending. The main heading is 'Parent Contributor'. Below this, a green box contains the text: 'Once your parent accepts the invitation, they can complete the parent section of this FAFSA form.' A note below states: 'They may be asked to invite their spouse as a contributor too. You can check the status of contributor invitations from the "My Activity" page.' The central content area is a white box with a 'Parent' header and a green person icon. It displays the email address '599887939test@testcod.edu' and an 'Invite Sent' button. Below this is a section titled 'Other Ways to Send the Invite' with a dropdown arrow. This section contains a 'Copy and Send the Invite Link' button, the URL 'www.fafsa.gov/invite/7NDNUKA', a 'Copy Link' button, and a note: 'You can also have them go to www.fafsa.gov/invite and enter code: 7NDNUKA'. At the bottom of this section is a 'Cancel Invite' button.

Student Review Page

- Review page displays responses
- View all responses by selecting “Expand All”
- To edit a response, the student can select a question’s hyperlink to be taken to that page



The screenshot shows the FAFSA Student Review Page for the 2026-27 form year, for student Alex Tran. The page has a light blue header with the FAFSA logo, form year, student name, and links for 'Save' and 'FAFSA Menu'. Below the header, a section titled 'Continue To Sign Your Form' includes a summary of the information provided and an illustration of two people on bicycles. A green checkmark icon and the text 'Scroll To Continue' indicate the next step: 'After reviewing your answers, scroll to the bottom of the page and select "Continue." Then, sign your section of the FAFSA form.' The 'Student Sections' list includes 'Introduction Personal Identifiers', 'Section 1 Personal Circumstances', 'Section 2 Demographics', 'Section 3 Financials', and 'Section 4 Colleges', each with a green checkmark and a circular arrow icon. An 'Expand All' link is at the top right of this list. The 'Contributor Section' shows that the section is shared with 1 contributor(s) and includes a table with columns for Contributor(s), Role, Invite Code, and Status. The table lists one contributor: 599887939test@testcod.edu, Parent, with invite code 7NDNLUKA and a status of 'Invite Sent'. At the bottom, there are 'Previous' and 'Continue' buttons.

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

Continue To Sign Your Form

Here's a summary of the information you provided on the FAFSA[®] form. Continue once you're ready to submit.

Scroll To Continue

After reviewing your answers, scroll to the bottom of the page and select "Continue." Then, sign your section of the FAFSA form.

Student Sections Expand All

- Introduction Personal Identifiers
- Section 1 Personal Circumstances
- Section 2 Demographics
- Section 3 Financials
- Section 4 Colleges

Contributor Section

This Section is Shared with 1 Contributor(s) Manage Contributor Information

Contributor(s)	Role	Invite Code	Status
599887939test@testcod.edu	Parent	7NDNLUKA	Invite Sent

Previous Continue

Student Signature

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

Personal Circumstances

Demographics

Financials

Colleges

Contributor Invite

6 Signature

Sign and Complete Your Section ①

Summary

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

The FAFSA form is a legal document you will electronically sign with your StudentAid.gov account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

By signing this application electronically using your FSA ID, YOU, THE STUDENT, certify that you

- will use federal and/or state student aid only to pay the cost of attending an institution of higher education,
- are not in default on a federal student loan or have made satisfactory arrangements to repay it,
- do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
- will notify your school if you default on a federal student loan, and
- will not receive a Federal Pell Grant from more than one school for the same period of time.

By signing this application electronically using your StudentAid.gov account username and password, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide

By signing this application electronically using your StudentAid.gov account username and password, you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide

- information that will verify the accuracy of your completed form, and
- U.S. or foreign income tax forms that you filed or are required to file.

You also certify that you understand that the secretary of education has the authority to verify information reported on your application.

If you sign this application or any document related to the federal student aid programs electronically using a username and password, and/or any other credential, you certify that you are the person identified by the username and password, and/or any other credential and have not disclosed that username and password, and/or any other credential to anyone else. If you purposefully give false or misleading information, including applying as an independent student without meeting the unusual circumstances required to qualify for such a status, you may be subject to criminal penalties under 20 U.S.C. 1097, which may include a fine up to \$20,000, imprisonment, or both.

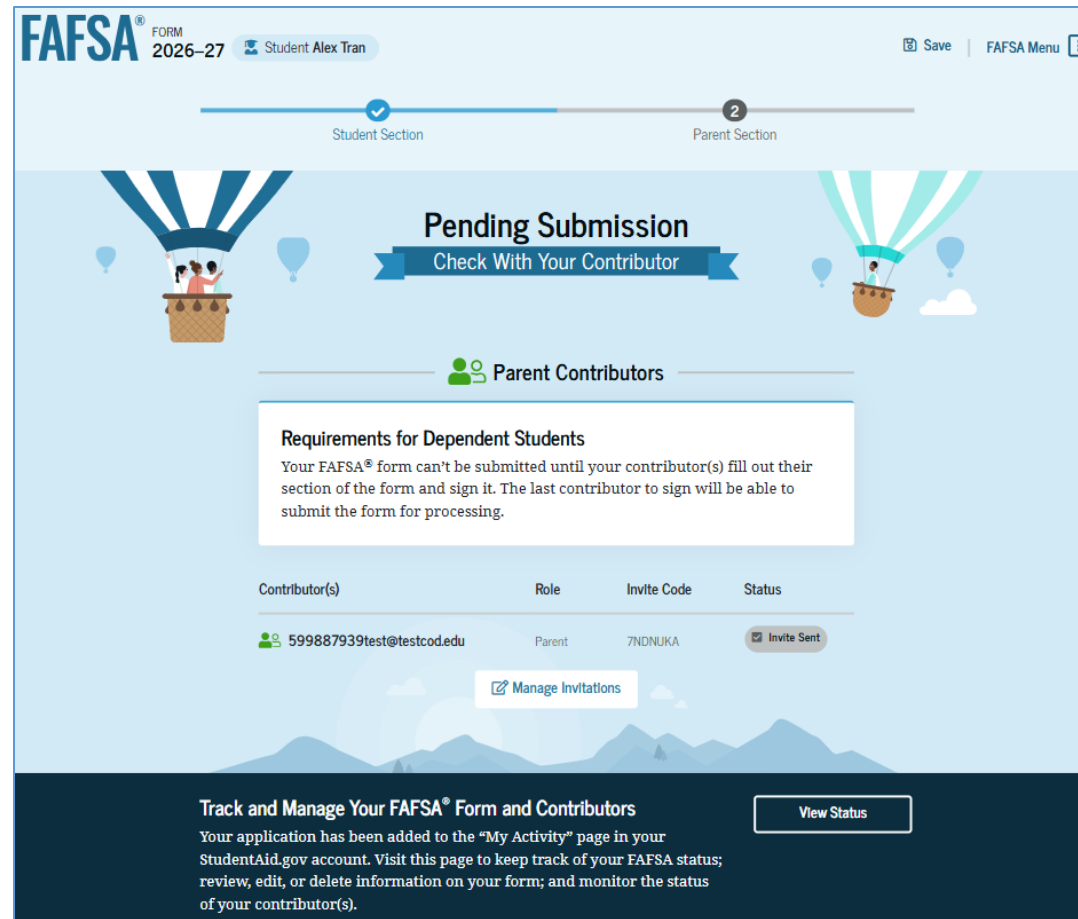
Additionally, by signing this application electronically using your FSA ID, you authorize the U.S. Department of Education to disclose all information provided on this application, as required under Section 483(a)(2)(D)(i) of the *Higher Education Act of 1965*, as amended, to the institutions you have identified herein, state higher education agencies (in your state of residence and the states in which the institutions identified herein are located), and designated scholarship organizations to assist with the application, award, and administration of federal, state, or institutional financial aid programs and designated scholarship programs. Notwithstanding this authorization, the name of an institution that you select to authorize such disclosure shall not be shared with any other institution.

Sign Your FAFSA[®] Form

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

Previous Sign

Student Section Complete



The screenshot shows the FAFSA 2026-27 interface for Student Alex Tran. A progress bar at the top indicates the 'Student Section' is complete (marked with a checkmark) and the 'Parent Section' is next (marked with a '2'). The main heading is 'Pending Submission' with a sub-header 'Check With Your Contributor'. Below this, a section titled 'Parent Contributors' contains a box with 'Requirements for Dependent Students' stating that the form cannot be submitted until contributors complete their sections. A table lists one contributor: 599887939test@testcod.edu, with the role 'Parent' and invite code '7NDNUKA'. The status is 'Invite Sent'. A 'Manage Invitations' button is present. At the bottom, a dark blue footer contains the text 'Track and Manage Your FAFSA® Form and Contributors' and a 'View Status' button.

FAFSA® FORM 2026-27 Student Alex Tran

Save | FAFSA Menu

Student Section 2 Parent Section

Pending Submission

Check With Your Contributor

Parent Contributors

Requirements for Dependent Students

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

Contributor(s)	Role	Invite Code	Status
599887939test@testcod.edu	Parent	7NDNUKA	Invite Sent

Manage Invitations

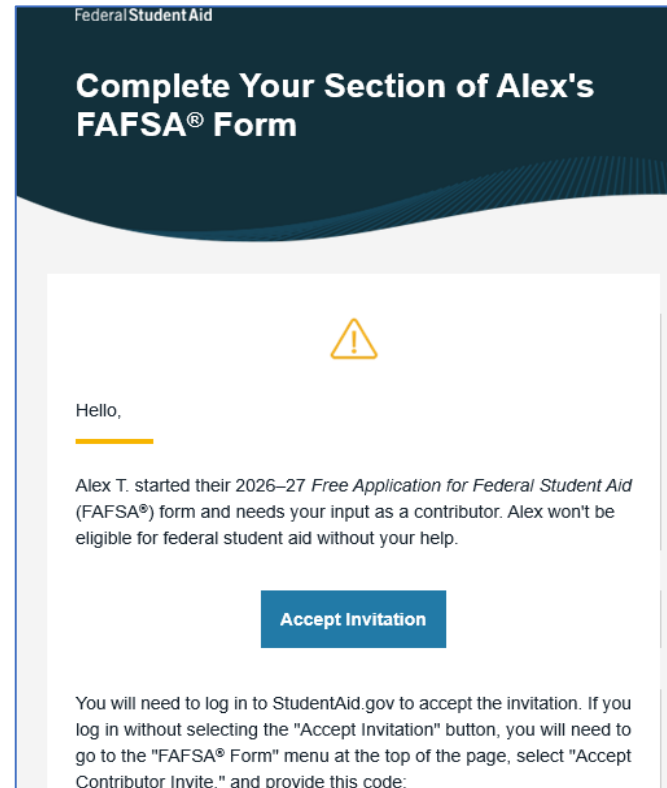
Track and Manage Your FAFSA® Form and Contributors

Your application has been added to the "My Activity" page in your StudentAid.gov account. Visit this page to keep track of your FAFSA status; review, edit, or delete information on your form; and monitor the status of your contributor(s).

View Status

Parent Email

- Parent receives email with invitation to contribute to student's FAFSA.
- Parent selects “Accept Invitation” and is taken to StudentAid.gov



Federal Student Aid

Complete Your Section of Alex's FAFSA® Form

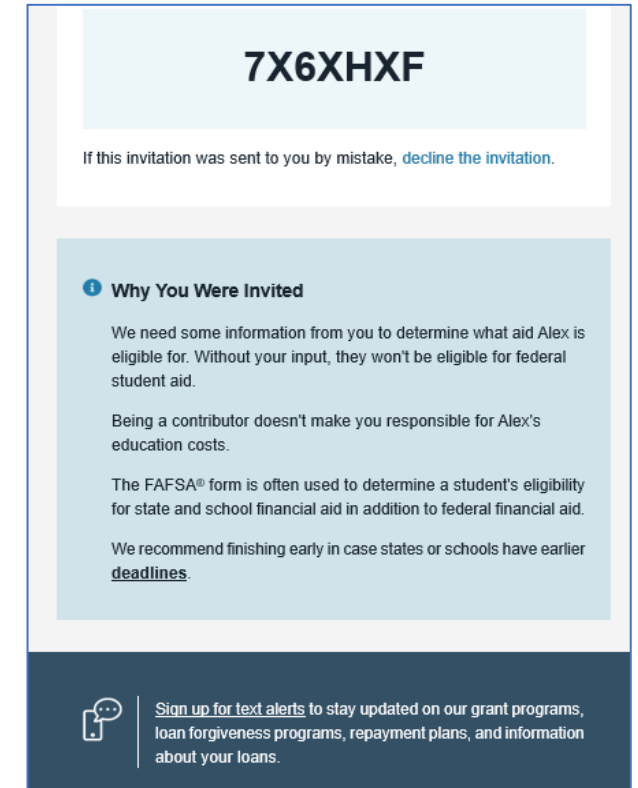
⚠

Hello,

Alex T. started their 2026–27 *Free Application for Federal Student Aid* (FAFSA®) form and needs your input as a contributor. Alex won't be eligible for federal student aid without your help.

[Accept Invitation](#)

You will need to log in to StudentAid.gov to accept the invitation. If you log in without selecting the "Accept Invitation" button, you will need to go to the "FAFSA® Form" menu at the top of the page, select "Accept Contributor Invite," and provide this code:



7X6XHXF

If this invitation was sent to you by mistake, [decline the invitation](#).


Why You Were Invited

We need some information from you to determine what aid Alex is eligible for. Without your input, they won't be eligible for federal student aid.

Being a contributor doesn't make you responsible for Alex's education costs.

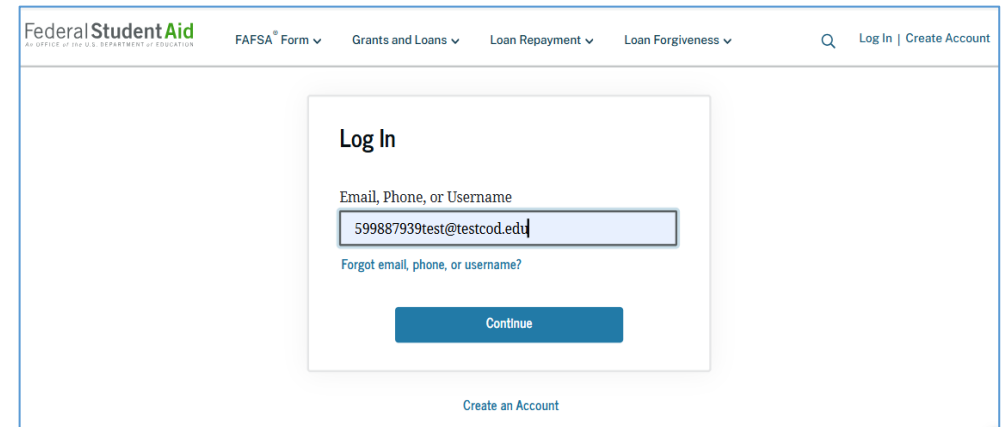
The FAFSA® form is often used to determine a student's eligibility for state and school financial aid in addition to federal financial aid.

We recommend finishing early in case states or schools have earlier [deadlines](#).

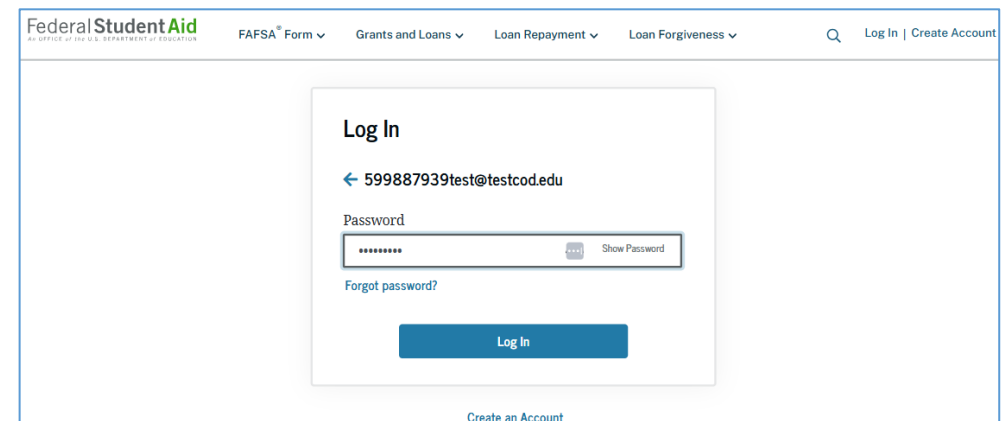
 [Sign up for text alerts](#) to stay updated on our grant programs, loan forgiveness programs, repayment plans, and information about your loans.

Parent Log In

- Parent is taken from their email to the “Log In” page to enter their StudentAid.gov account username and password
- If parent doesn’t have username/password, they can create an account from this page



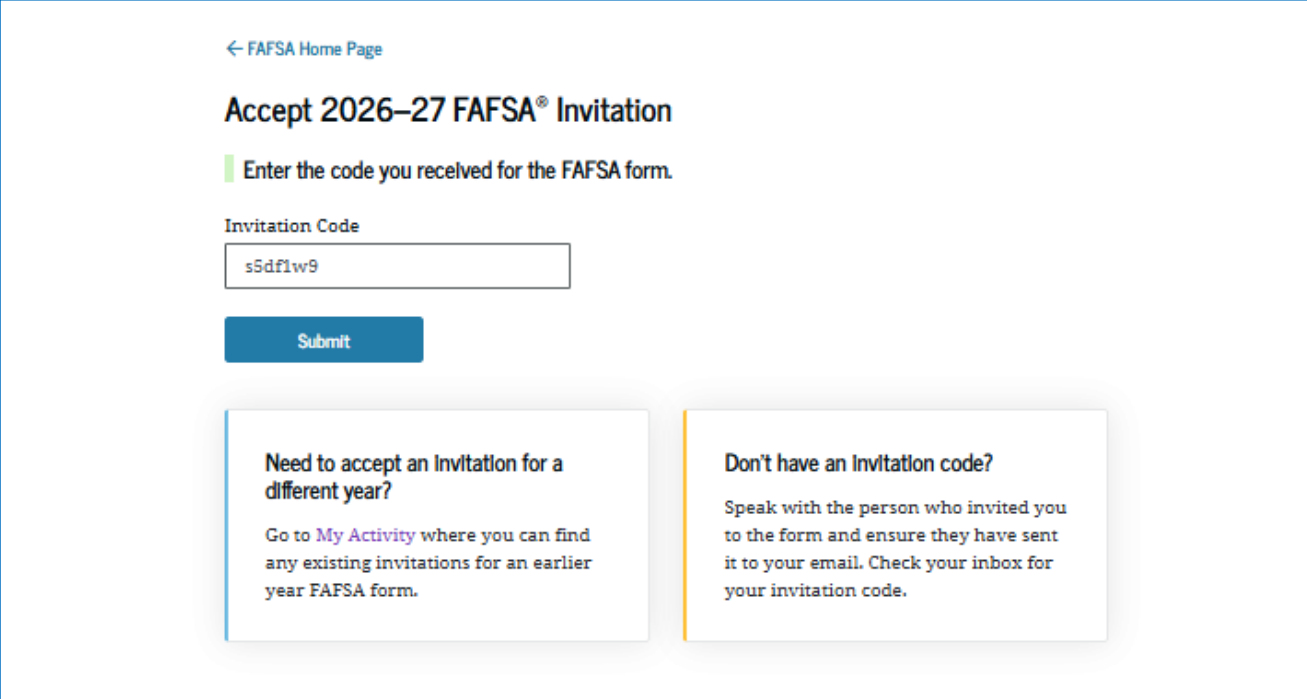
The screenshot shows the Federal Student Aid website's login interface. At the top, there is a navigation bar with the Federal Student Aid logo, links for FAFSA Form, Grants and Loans, Loan Repayment, and Loan Forgiveness, a search icon, and links for Log In and Create Account. The main content area features a 'Log In' heading, followed by a text input field labeled 'Email, Phone, or Username' containing the text '599887939test@testcod.edu'. Below the input field is a link for 'Forgot email, phone, or username?'. A blue 'Continue' button is positioned below the input field. At the bottom of the login box, there is a link to 'Create an Account'.



This screenshot shows the next step in the login process. The 'Log In' heading is followed by a back arrow and the email address '599887939test@testcod.edu'. Below this is a 'Password' label and a text input field with masked characters (dots). To the right of the password field is a 'Show Password' link. A link for 'Forgot password?' is located below the password field. A blue 'Log In' button is at the bottom of the login box. A link to 'Create an Account' is at the bottom of the page.

Parent Accepts Invitation

- The invitation code from the parent's email automatically fills in the text box if the parent used the link from the email
- Parent selects submit



[← FAFSA Home Page](#)

Accept 2026-27 FAFSA® Invitation

Enter the code you received for the FAFSA form.

Invitation Code

Submit

Need to accept an Invitation for a different year?

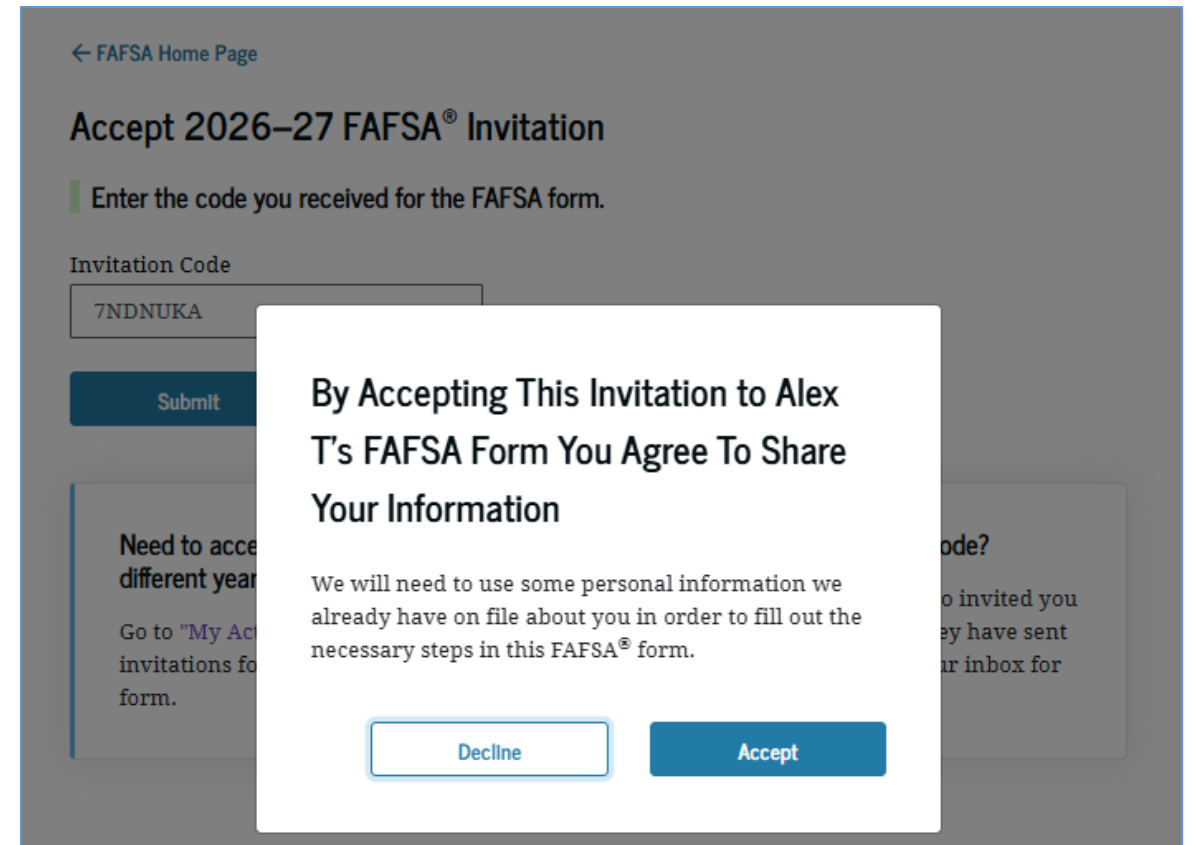
Go to [My Activity](#) where you can find any existing invitations for an earlier year FAFSA form.

Don't have an Invitation code?

Speak with the person who invited you to the form and ensure they have sent it to your email. Check your inbox for your invitation code.

Parent Accepts Invitation

- A pop-up window will appear confirming student's name
- Parent selects “Accept” to agree to sharing their information and enter the FAFSA form



The screenshot shows the FAFSA Home Page with a pop-up window. The background page has a header "← FAFSA Home Page" and a title "Accept 2026–27 FAFSA® Invitation". Below the title is a green bar with the text "Enter the code you received for the FAFSA form." There is a text input field labeled "Invitation Code" containing the code "7NDNUKA" and a blue "Submit" button. To the left of the pop-up, there is a section titled "Need to accept for a different year?" with a link "Go to 'My Account' for more information about FAFSA invitations for the current year." The pop-up window is white with a blue border and contains the following text: "By Accepting This Invitation to Alex T's FAFSA Form You Agree To Share Your Information". Below this is a paragraph: "We will need to use some personal information we already have on file about you in order to fill out the necessary steps in this FAFSA® form." At the bottom of the pop-up are two buttons: "Decline" (white with blue border) and "Accept" (solid blue).

Parent Sections



Parent Onboarding and Identity Information

There will be 4 screens of onboarding information

- What is the FAFSA?
 - Contributors to the FAFSA Form
 - What to Expect
 - After Submitting the FAFSA Form
- Parent will then verify that the personal information is correct and update if needed.

FAFSA[®] FORM 2026-27 Parent of Alex Tran

Understanding the FAFSA[®] Form

1 of 4

What is the FAFSA[®] form?

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

You might need the following information or documents as you fill out the FAFSA form:

- Tax returns
- Records of child support received
- Current balances of cash, savings, and checking accounts
- Net worth of investments, businesses, and farms

What is FAFSA[®]?
What is FAFSA[®] and why is it important?

Watch on YouTube

Previous Continue

FAFSA[®] FORM 2026-27 Parent of Alex Tran

Understanding the FAFSA[®] Form

2 of 4

Contributors to the FAFSA[®] Form

Who is a contributor on the FAFSA[®] form?

Watch on YouTube

Parents or Spouses

Answers on the FAFSA form will determine if you and your spouse are identified as contributors. As a contributor, you'll complete your own sections of the form and need to provide your personal and financial information. Being a contributor doesn't make you financially responsible for the student's education.

How to Invite

Contributors will need to log in with their own StudentAid.gov account username and password to provide their information. To invite the student to a FAFSA form, you'll need to provide their name, date of birth, Social Security number, and email address. To invite your spouse to a FAFSA form, you'll need to provide their email address.

Which parent is considered a contributor?

Previous Continue

FAFSA[®] FORM 2026-27 Parent of Alex Tran

Understanding the FAFSA[®] Form

3 of 4

What to Expect

How long will this take? 30 minutes

Every contributor must provide consent and approval for the student to be eligible for federal student aid. With your consent and approval, we can obtain your federal tax information automatically from the IRS to help you complete your section of the student's FAFSA[®] form.

You can save the form and return to it later if you need more time.

What Does It Mean To Provide Consent and Approval on the FAFSA Form?

Watch on YouTube

Learn about how we use the information we collect on the FAFSA form.

Previous Continue

FAFSA[®] FORM 2026-27 Parent of Alex Tran

Understanding the FAFSA[®] Form

4 of 4

After Submitting the FAFSA[®] form

Once the student's FAFSA form is submitted, the student will need to check on its status and make corrections, if required.

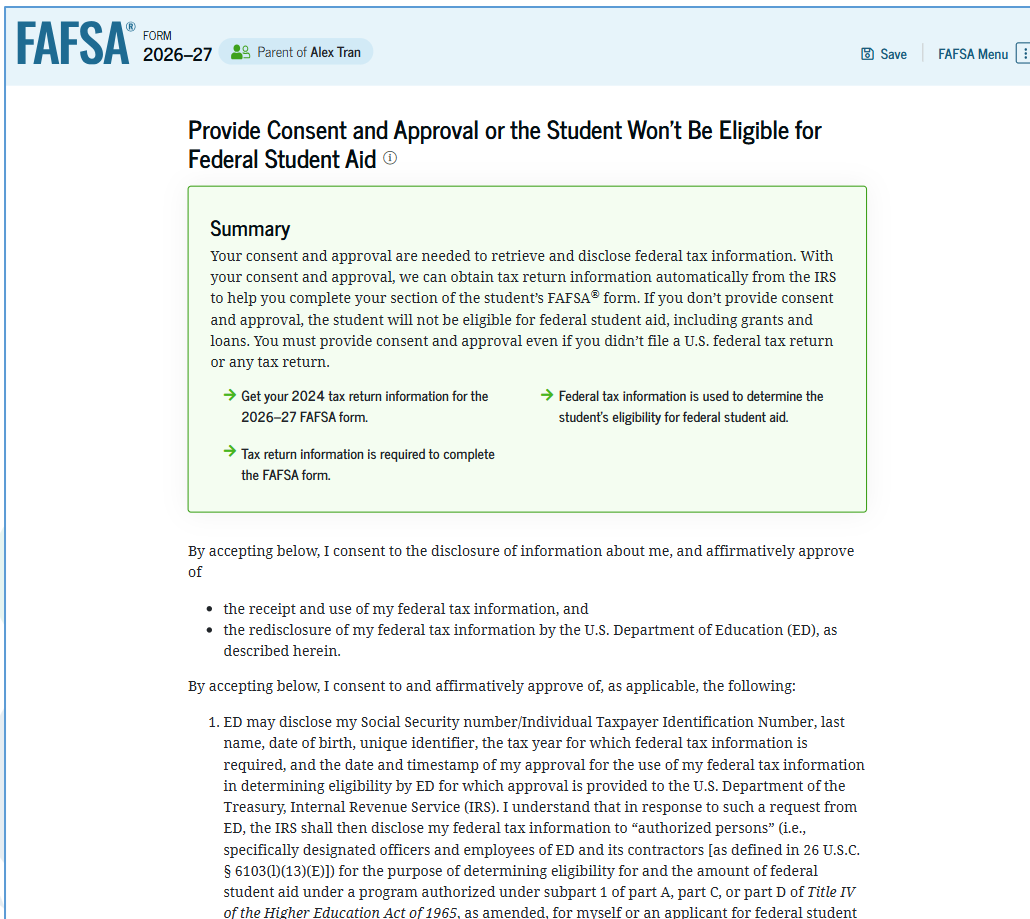
What Happens After Submitting Your FAFSA Form?

Watch on YouTube

- The student's form will be processed in one to three days.
- The student will be able to view their FAFSA Submission Summary. It will include their Student Aid Index (SAI), an index number used to determine federal student aid eligibility.
- Schools will use the student's SAI to create their financial aid offer that explains the types and amounts of aid they are offering to the student. Most schools only send an aid offer when they accept a student for admission.

Previous Start FAFSA Form

Parent Consent and Approval



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

Provide Consent and Approval or the Student Won't Be Eligible for Federal Student Aid

Summary

Your consent and approval are needed to retrieve and disclose federal tax information. With your consent and approval, we can obtain tax return information automatically from the IRS to help you complete your section of the student's FAFSA[®] form. If you don't provide consent and approval, the student will not be eligible for federal student aid, including grants and loans. You must provide consent and approval even if you didn't file a U.S. federal tax return or any tax return.

- Get your 2024 tax return information for the 2026-27 FAFSA form.
- Federal tax information is used to determine the student's eligibility for federal student aid.
- Tax return information is required to complete the FAFSA form.

By accepting below, I consent to the disclosure of information about me, and affirmatively approve of


- the receipt and use of my federal tax information, and
- the redisclosure of my federal tax information by the U.S. Department of Education (ED), as described herein.


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

1. ED may disclose my Social Security number/Individual Taxpayer Identification Number, last name, date of birth, unique identifier, the tax year for which federal tax information is required, and the date and timestamp of my approval for the use of my federal tax information in determining eligibility by ED for which approval is provided to the U.S. Department of the Treasury, Internal Revenue Service (IRS). I understand that in response to such a request from ED, the IRS shall then disclose my federal tax information to "authorized persons" (i.e., specifically designated officers and employees of ED and its contractors [as defined in 26 U.S.C. § 6103(l)(13)(E)]) for the purpose of determining eligibility for and the amount of federal student aid under a program authorized under subpart 1 of part A, part C, or part D of Title IV of the Higher Education Act of 1965, as amended, for myself or an applicant for federal student

- All contributors **MUST** provide consent and approval for the student to be eligible for aid

Parent IRS Information

FAFSA[®] FORM 2026-27  Parent of Alex Tran

Save | FAFSA Menu 

**We're securely importing your information.**


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



Loading...


Parent Demographics

FAFSA[®] FORM
2026–27

 Parent of Alex Tran

Parent Demographics

We'll ask questions about you and your family. These questions will help determine how much federal student aid the student is eligible to receive for school.



Previous

Continue

Parent Demographics

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

1 Demographics 2 Financials 3 Signature

Parent Current Marital Status ⓘ

☐ Single (never married)

☐ Unmarried and both legal parents living together

☒ Married (not separated)

☐ Remarried

☐ Separated

☐ Divorced

☐ Widowed

Previous Continue

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

1 Demographics 2 Financials 3 Signature

Parent State of Residence

State

Usually, this is the state where the parent lives.

Tennessee (TN) ⓘ

Date the Parent Became a Resident of Tennessee (TN)

If the parent was born in Tennessee (TN) and has not moved out of state since, enter their date of birth. Otherwise, enter the date the parent moved to Tennessee (TN).

Month Year


01 2006 ⓘ

Previous Continue

****It is important that the parent report residency correctly for a dependent student to be eligible for state aid.**


Parent Finances

FAFSA[®] FORM
2026–27

 Parent of Alex Tran

Parent Finances

The FAFSA[®] form helps determine the student's eligibility for federal student aid. We ask about your financial information in this section.



What if you have special financial circumstances?

[Previous](#)

[Continue](#)

Parent Financials

FAFSA® 2026-27 Parent of Alex Tran Save FAFSA Menu

Demographics Financials Signature

Federal Benefits Received

Responses Won't Reduce Federal Student Aid Eligibility
Answering these questions won't reduce the student's eligibility for federal student aid or these programs.

At any time during 2024 or 2025, did the parent or anyone in their family receive benefits from any of the following federal programs? ⓘ
Family includes the parent's spouse, children, and other dependents. Select all that apply or "None of these apply."


- ☐ Earned Income Credit (EIC) ⓘ
- ☐ Federal Housing Assistance ⓘ
- ☐ Free or Reduced-Price School Lunch ⓘ
- ☐ Medicaid ⓘ
- ☐ Refundable Credit for Coverage Under a Qualified Health Plan (QHP) or Health Insurance Subsidy ⓘ
- ☐ Supplemental Nutrition Assistance Program (SNAP) ⓘ
- ☐ Supplemental Security Income (SSI) ⓘ
- ☐ Temporary Assistance for Needy Families (TANF) ⓘ
- ☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) ⓘ
- ☒ None of these apply.

Previous Continue

If parent or anyone in parent's family has received federal benefits, they would indicate that here.

- Earned Income Credit (EIC)
- Federal Housing Assistance
- Free or Reduced-Price School Lunch
 - Some counties receive this benefit county wide
 - ONLY answer YES if family would meet qualifications
- Medicaid
- Refundable Credit for Coverage Under Qualified health Plan (QHP) or Health Insurance Subsidy
- Supplemental Nutrition Assistance Program (SNAP)
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

Parent Financials

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

Demographics **2** Financials **3** Signature

Parent Tax Filing Status

Did or will the parent file a 2024 IRS Form 1040 or 1040-NR? ⓘ

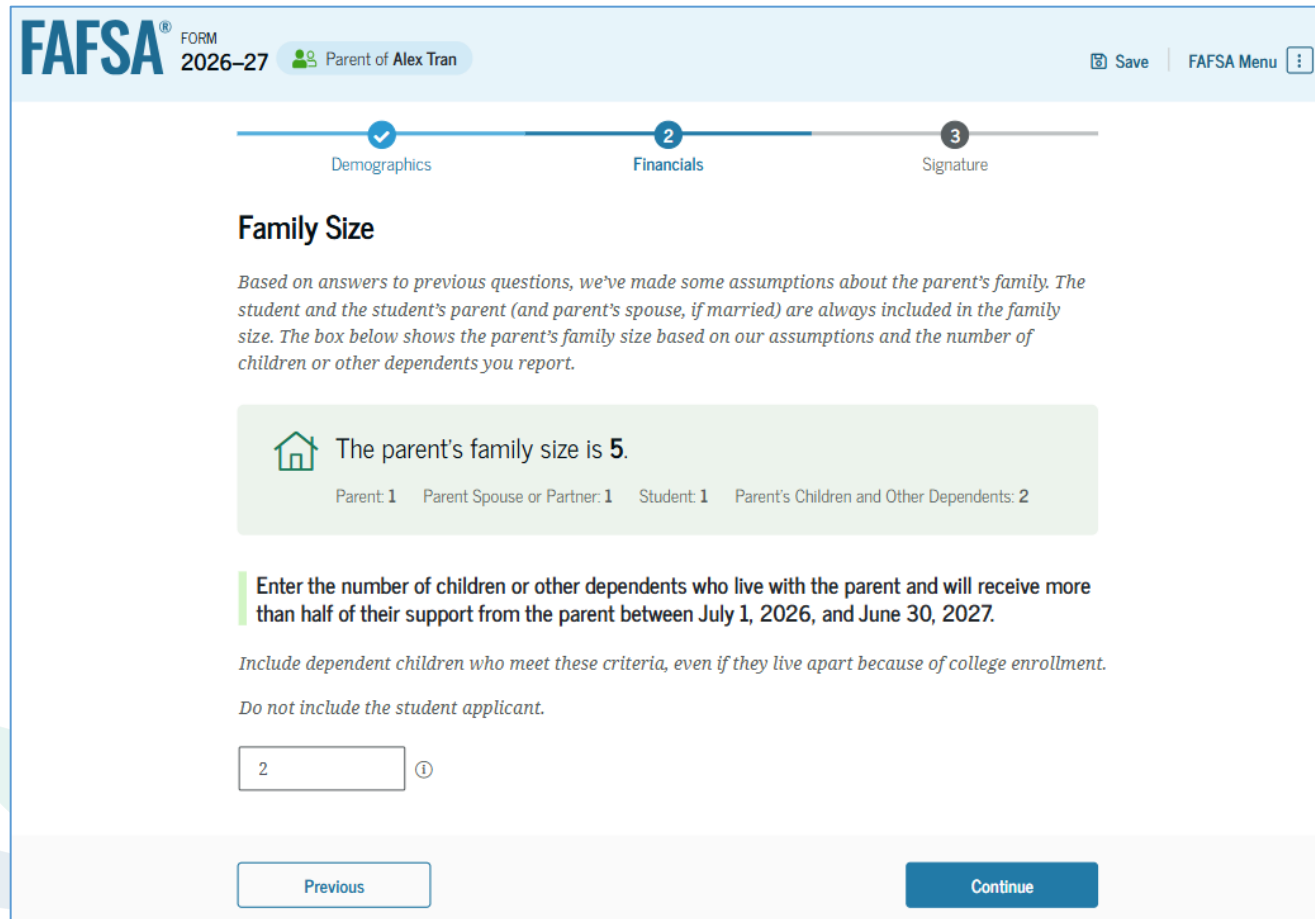
☒ Yes ☐ No

Did or will the parent file a 2024 joint tax return with their current spouse? ⓘ

☒ Yes ☐ No

Previous Continue

Parent Financials




The screenshot shows the FAFSA 2026-27 interface for a parent of Alex Tran. The progress bar indicates three steps: 1. Demographics (completed), 2. Financials (current), and 3. Signature. The 'Family Size' section explains that the family size is calculated based on previous questions and assumptions, including the student and their parent (and spouse if married). It shows a breakdown: Parent: 1, Parent Spouse or Partner: 1, Student: 1, and Parent's Children and Other Dependents: 2, totaling 5. A text box prompts the user to enter the number of children or other dependents who live with the parent and will receive more than half of their support from the parent between July 1, 2026, and June 30, 2027. It includes instructions to include dependent children who meet criteria, even if they live apart because of college enrollment, and to not include the student applicant. A text input field contains the number '2'. At the bottom are 'Previous' and 'Continue' buttons.

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

Demographics Financials Signature

Family Size

Based on answers to previous questions, we've made some assumptions about the parent's family. The student and the student's parent (and parent's spouse, if married) are always included in the family size. The box below shows the parent's family size based on our assumptions and the number of children or other dependents you report.

 The parent's family size is 5.

Parent: 1 Parent Spouse or Partner: 1 Student: 1 Parent's Children and Other Dependents: 2

Enter the number of children or other dependents who live with the parent and will receive more than half of their support from the parent between July 1, 2026, and June 30, 2027.

Include dependent children who meet these criteria, even if they live apart because of college enrollment.

Do not include the student applicant.

2 ⓘ

Previous Continue

The family size is calculated using information from the parent's FTI that was transferred

If needed they can correct the number of children or other dependents

Parent Financials

FAFSA[®] FORM 2026–27 Parent of Alex Tran Save FAFSA Menu

✓ Demographics

2 Financials

3 Signature

Number in College

Out of the 5 people in the parent's family, how many will be in college between July 1, 2026, and June 30, 2027?

Never include the student's parent(s). Always include the student applicant. Also include the parent's other children or dependents if they will also be in college during this time.

ⓘ

Previous

Continue

Parent Financials

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

Demographics Financials Signature

Annual Child Support Received
Enter the total amount of child support the parent received for the last complete calendar year.

\$ 0 .00 ⓘ

Parent Assets

Current Total of Cash, Savings, and Checking Accounts
Don't include student aid, retirement accounts, or investments.

\$ 0 .00 ⓘ

Current Net Worth of Investments, Including Real Estate
Don't include the home the parent lives in. Net worth is the value of the investments minus any debts owed against them.

\$ 0 .00 ⓘ

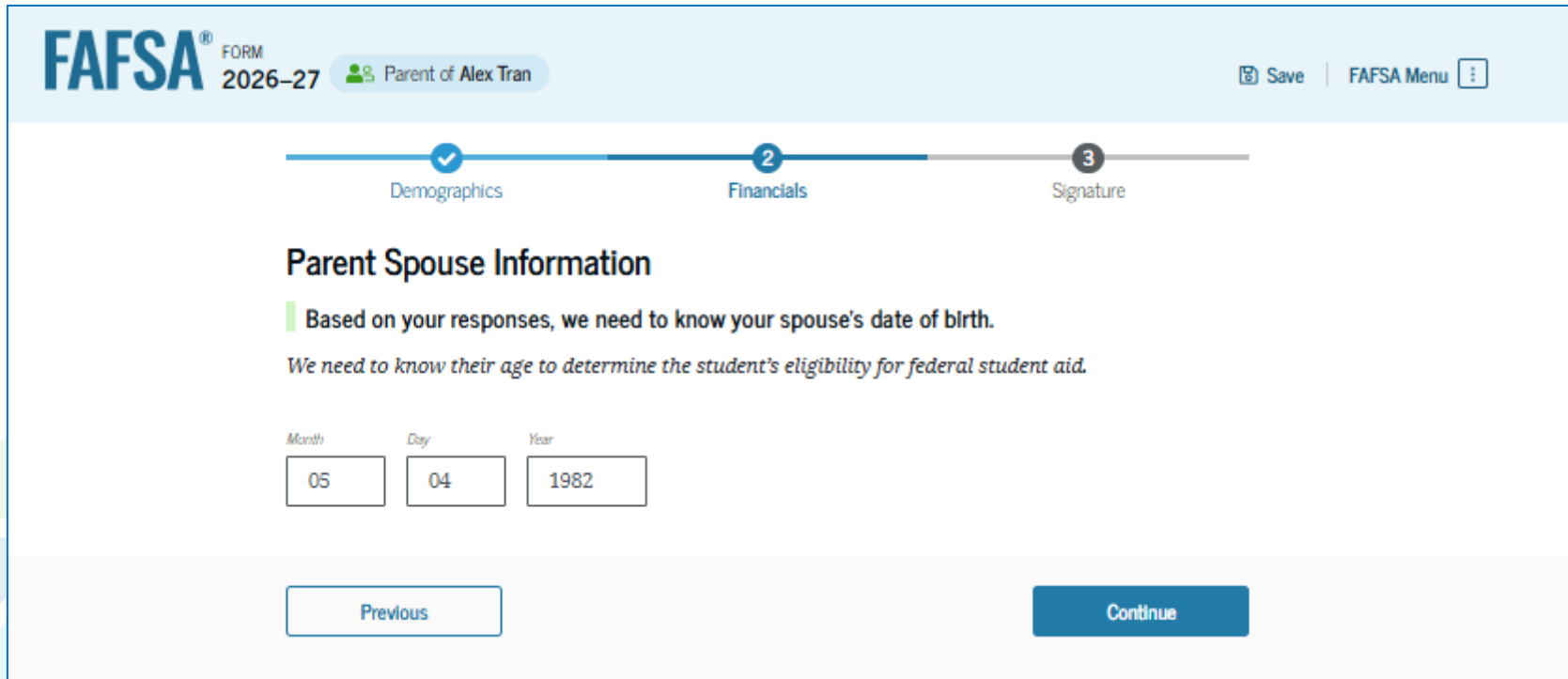
Current Net Worth of Businesses and Farms
Enter the net worth of the parent's businesses and income-producing farms. Net worth is the value of the businesses and farms minus any debts owed against them. Don't include a family business with 100 or fewer full-time employees, farms where the family resides, or a commercial fishing business and related expenses.

\$ 0 .00 ⓘ

Previous Continue

- Cash, Savings and Checking Accounts
 - Does not include retirement accounts
- Current Net worth of Investments and Real Estate
 - Does not include the home in which the parent lives
- Current Net worth of Businesses and Farms
 - ****DO NOT**** include a family business with 100 or fewer full-time employees, farms where the family resides, or a commercial fishing business and related expenses.
- Law reinstates the exemption of family farm and small business assets from the SAI calculation and expands this asset exemption to family-owned commercial fisheries, with an effective date of July 1, 2026.

Other Parent Information



The image shows a screenshot of the FAFSA 2026-27 application for the parent of Alex Tran. The interface includes a progress bar at the top with three steps: 1. Demographics (completed), 2. Financials (current step), and 3. Signature. The main heading is "Parent Spouse Information". Below this, a message states: "Based on your responses, we need to know your spouse's date of birth. We need to know their age to determine the student's eligibility for federal student aid." The date of birth is entered as 05/04/1982, with separate boxes for Month (05), Day (04), and Year (1982). At the bottom, there are "Previous" and "Continue" buttons.

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

1 Demographics 2 Financials 3 Signature

Parent Spouse Information


Based on your responses, we need to know your spouse's date of birth.
We need to know their age to determine the student's eligibility for federal student aid.


Month Day Year

05 04 1982

Previous Continue


Parent Review Page




FAFSA[®] FORM 2026–27  Parent of Alex Tran Save FAFSA Menu







Continue To Sign Your Form

Here's a summary of the information you provided on the FAFSA[®] form. Continue once you're ready to submit.



 **Scroll To Continue**
After reviewing your answers, scroll to the bottom of the page and select "Continue." Then, sign your section of the FAFSA form.

Parent Sections Expand All

-  Introduction
Personal Identifiers 
-  Section 1
Demographics 
-  Section 2
Financials 

Previous Continue

Parent Signature



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

Demographics Financials **Signature**

Sign and Submit the FAFSA[®] Form ¹

Summary

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

The FAFSA form is a legal document you will electronically sign with your StudentAid.gov account username and password (FSA ID). Because your FSA ID is associated with your personal information, do not share it with anyone.

By signing the student's application electronically using your StudentAid.gov account username and password, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide

- information that will verify the accuracy of your completed form, and
- U.S. or foreign income tax forms that you filed or are required to file.

You also certify that you understand that the secretary of education has the authority to verify information reported on your application.

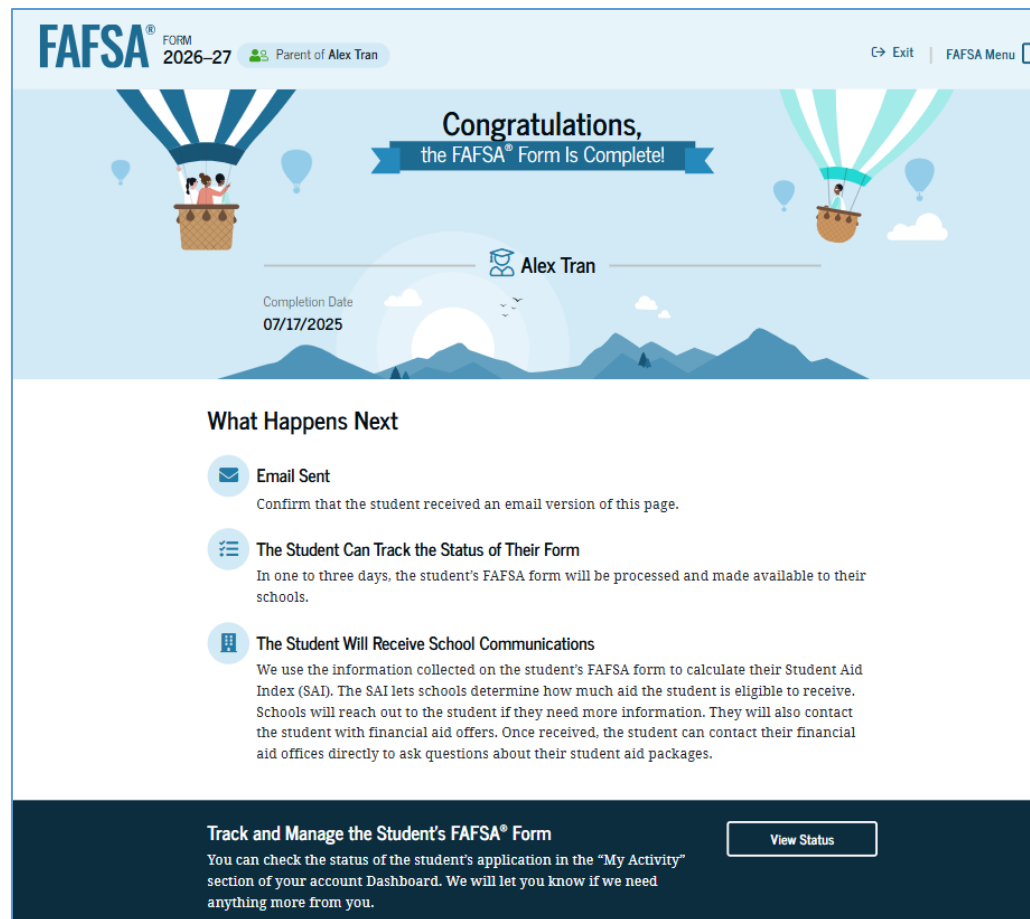
If you sign this application or any document related to the federal student aid programs electronically using a username and password and/or any other credential, you certify that you are the person identified by the username and password, and/or any other credential and have not disclosed that username and password, and/or any other credential to anyone else. If you purposefully give false or misleading information, including applying as an independent student without meeting the unusual circumstances required to qualify for such a status, you may be subject to criminal penalties under 20 U.S.C. 1097, which may include a fine up to \$20,000, imprisonment, or both.

Additionally, by signing this application electronically using your FSA ID, you authorize the U.S. Department of Education to disclose all information you provided on this application, as required under Section 483(a)(2)(D)(i) of the *Higher Education Act of 1965*, as amended, to the institutions identified herein, state higher education agencies (in the student's state of residence and the states in which the institutions identified herein are located), and designated scholarship organizations to assist with the application, award, and administration of federal, state, or institutional financial aid programs and designated scholarship programs. Notwithstanding this authorization, the name of an institution the student selected to authorize such disclosure shall not be shared with any other institution.

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

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

Parent Confirmation



FAFSA[®] FORM 2026-27 Parent of Alex Tran




Exit FAFSA Menu

Congratulations,
the FAFSA[®] Form Is Complete!

Alex Tran

Completion Date
07/17/2025

What Happens Next

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

Track and Manage the Student's FAFSA[®] Form

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

[View Status](#)

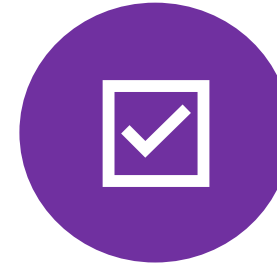
FAFSA Processing Results



Application is processed in order it was received-
Usually within 72 hours if completed online



Student will receive an e-mail with a link to view FAFSA Submission Summary (FSS) Online



Student can review FSS and make corrections, if needed



Paper form available but can take weeks to months to be processed

FAFSA Processing Results



Action Needed:

- **Draft:** Your section of the FAFSA form is incomplete.
- **In Progress:** You provided consent and approval and signed your form, but the form needs submitted.
- **Action Required:** You are missing consent, approval, signature, or the form was processed, and a correction is required!

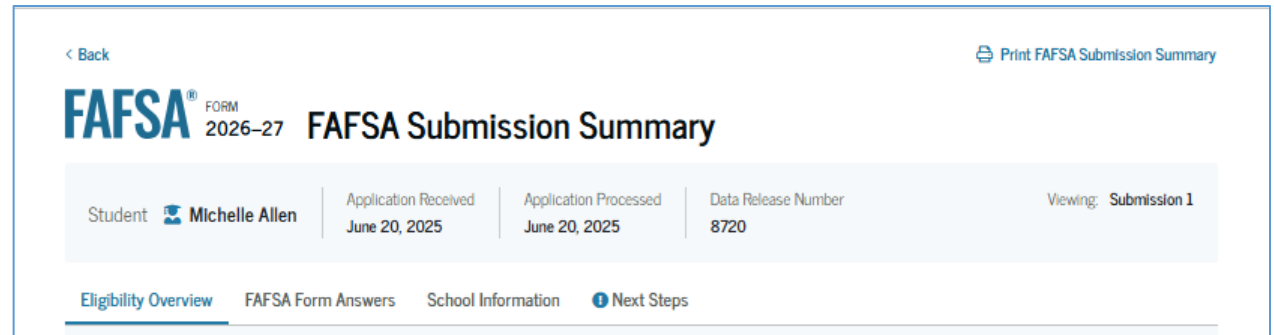


NO Action Needed:

- **In Review:** Your FAFSA form was submitted but has not processed yet.
- **Processed:** Your application was processed successfully

FAFSA Submission Summary

- Four Sections
 - Eligibility Overview
 - FAFSA Form Answers
 - School Information
 - Next Steps
- Ability to print summary



A screenshot of the FAFSA Submission Summary page. At the top left is a '< Back' link. At the top right is a 'Print FAFSA Submission Summary' link with a printer icon. The main header shows the 'FAFSA FORM 2026-27' logo followed by 'FAFSA Submission Summary'. Below this is a table with four columns: 'Student' (Michelle Allen), 'Application Received' (June 20, 2025), 'Application Processed' (June 20, 2025), and 'Data Release Number' (8720). To the right of the table is 'Viewing: Submission 1'. At the bottom is a navigation bar with four tabs: 'Eligibility Overview' (selected), 'FAFSA Form Answers', 'School Information', and 'Next Steps'.

Student	Application Received	Application Processed	Data Release Number	Viewing
Michelle Allen	June 20, 2025	June 20, 2025	8720	Submission 1

Eligibility Overview | FAFSA Form Answers | School Information | Next Steps

Institutional Student Information Record (ISIR)


- FAFSA Processing System (FPS) sends results to all colleges listed on the FAFSA.
- College reviews ISIR and may request additional information.
 - Additional documentation must be received before student may be eligible for aid.
 - Will use information to build financial aid offer letter
- WVHEPC receives the ISIR for all WV residents and students who list WV institution on FAFSA.

FAFSA Corrections

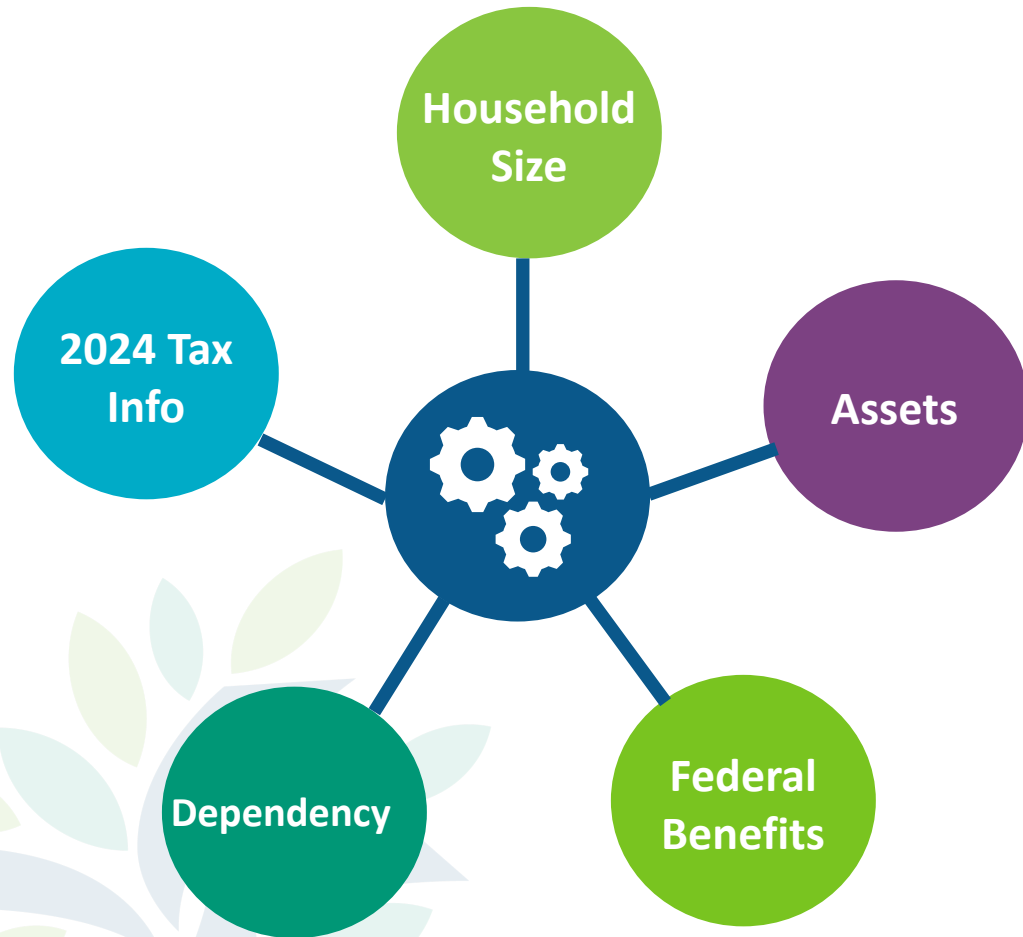
Corrections to FAFSA data may be made by:

- Logging into StudentAid.gov.
- Submitting documentation to college's financial aid office.

Common Errors/Corrections

- 
- Missing parent/student signatures
 - High School Completion Status
 - College Grade Level
 - Adding College
- *If making a correction, be sure to save all the way to the signatures to create a new transaction.*

Student Aid Index (SAI)



- The SAI represents the amount of money a student and their family could reasonably contribute toward the student's education in one academic year.
- The SAI is used to determine the student's eligibility for federal and state need-based aid.
- The SAI is NOT how much a student, and their family will pay!

Verification

Verification is a federal financial aid process that ensures the information submitted on the FAFSA is correct.

- The U.S. Department of Education randomly selects a percentage of FAFSAs for the verification process.
- College will reach out to request required documentation.
 - Will have to complete process separately for each college.
 - Check email!
- Selection for verification will be listed on FSS
 - Red exclamation mark on the next steps tab
- Student is not eligible for federal or state aid until verification is complete.

Verification

- Requested documents may include:
 - Verification Worksheet
 - Tax Return
 - IRS Direct Data Exchange
 - IRS Tax Return Transcript
 - Form 1040 = Schedules
 - W-2s
 - Notarized statements
 - Court documentation

V1

Taxes and
household size

V4

Identity and statement of
education purposes

V5

Both V1 and V4

Special Circumstances or Professional Judgement

- Different than unusual circumstances
 - Special circumstances are financial situations
 - Unusual circumstances are personal/dependency overrides
- Unique conditions exist that cannot be documented.
- Student should contact the institution's financial aid office for more information.
- Each institution may have a different process or come to a different decision.
- Decisions are final and cannot be appealed to U.S. Department of Education.

Special Circumstances or Professional Judgement

Change in employment status, income or assets

Change in student or parent's marital status

Medical, dental or nursing home expenses not covered by insurance

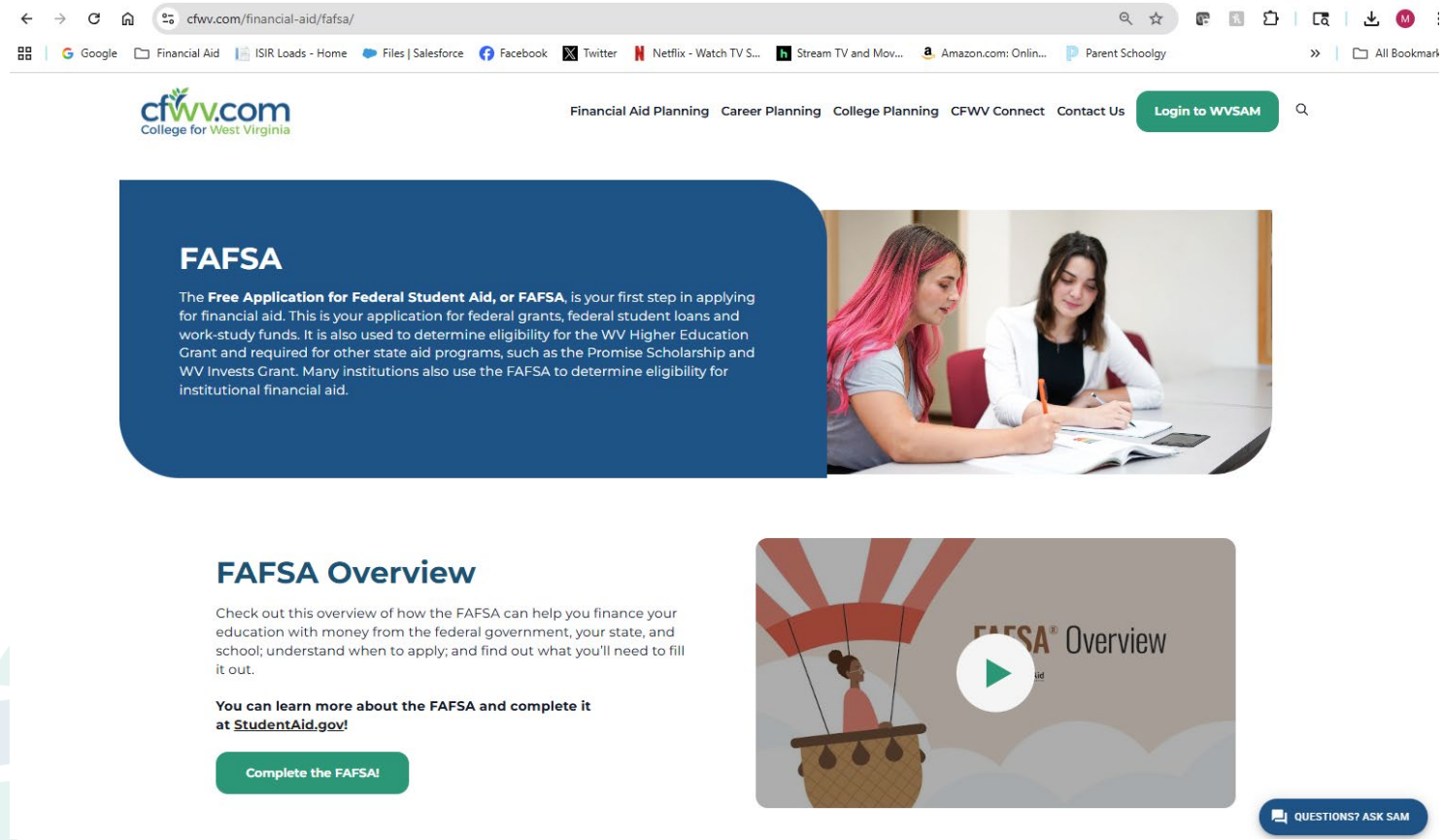

Tuition expenses at an elementary or secondary school

Child or dependent care expenses

Parent or spouse death

FAFSA Resources at CFWV.com

CFWV.com/fafsa



The screenshot shows the CFWV.com website with the URL cfwv.com/financial-aid/fafsa/ in the browser address bar. The page features the CFWV logo and navigation links for Financial Aid Planning, Career Planning, College Planning, CFWV Connect, and Contact Us. A green button labeled "Login to WVSAM" is visible. The main content area has a blue header with the word "FAFSA" in white. Below this, a paragraph explains that FAFSA is the first step in applying for financial aid, used for federal grants, loans, and work-study funds, and also for state aid programs like the WV Higher Education Grant and WV Invests Grant. To the right of the text is a photo of two young women sitting at a desk, looking at a laptop. Below the text is a section titled "FAFSA Overview" with a short paragraph about the overview and a link to StudentAid.gov. A green button labeled "Complete the FAFSA!" is positioned below the link. To the right of the text is a video player with a play button and the title "FAFSA Overview". At the bottom right of the page is a blue button labeled "QUESTIONS? ASK SAM".

FAFSA

The **Free Application for Federal Student Aid, or FAFSA**, is your first step in applying for financial aid. This is your application for federal grants, federal student loans and work-study funds. It is also used to determine eligibility for the WV Higher Education Grant and required for other state aid programs, such as the Promise Scholarship and WV Invests Grant. Many institutions also use the FAFSA to determine eligibility for institutional financial aid.

FAFSA Overview

Check out this overview of how the FAFSA can help you finance your education with money from the federal government, your state, and school; understand when to apply; and find out what you'll need to fill it out.

You can learn more about the FAFSA and complete it at StudentAid.gov!

[Complete the FAFSA!](#)

[QUESTIONS? ASK SAM](#)

Questions?



Division of Financial Aid
West Virginia Higher Education Policy
Commission
2001 Union Carbide Drive Building 2000 South
Charleston, WV 25303
(304) 558-4618
wvfinancialaid@wvhpec.edu
www.wvhpec.edu • www.cfww.com



WVSU Presentation

Lunch



Regional Breakouts



GEAR UP Year 5 Budget Planning

Mallory Carpenter, Assistant Director of WV GEAR UP

Reminders

- No items can be purchased (either for technology or for academic enrichment) until grant awards have been distributed
- Grant distributions are pending receiving GANs
- Prepare paperwork to be ready to go, but no official ordering until GAN is received
- Should GANs be received on time, the normal ordering timeline will be as usual



Student Voice Forum Registration

Mackenzie Brunson, College Access and Success Program Director

Student Voice Forum Registration

- **Date:** November 18 or November 19, 2025
 - Pick one day
- **Time:** 9:00 AM – 2:00 PM
- **Where:** Charleston Coliseum and Convention Center
- **Who:** HEROs and Student Success Society students
 - Max. 35 students per school
- Registration deadline is November 1, 2025

SCAN TO REGISTER





Data and Evaluation Update

Lesli Taylor, Assistant Director of Research and Evaluation



West Virginia GEAR UP: Year 5 Student and Family/Parent Survey Administration Overview

September 11, 2025

Susana Mazuelas Quirce, PhD
ICF External Evaluation Team



Year 5 Survey Administration

- All students in Grades 10, 11 and 12 who have not opted out
- A single parent/guardian for each Grade 10, 11 and 12 student

Who



- 15–20-minute survey asking about knowledge and opinions about college-related topics

What



- **Students** = Online via SCRIBE
- **Families/Parents** = Paper-and-pencil surveys, mailed by HEPC to every family/parent and option to complete online via SCRIBE

How



- **Student Survey:** Monday, December 1 – Friday, February 13
- **Family/Parent Survey:** TBD Winter 2026

When



Survey Return Rates

Year 5 WV GEAR UP Survey Return Rate Target	
<u>Student Survey</u>	<u>Family/Parent Survey</u>
80%	50%

How do we calculate survey return rates?

$$\textit{Student Survey Return Rate} = \frac{\textit{\# of returned student surveys}}{\textit{total student enrollment} - \textit{opt outs}}$$

$$\textit{Family/Parent Survey Return Rate} = \frac{\textit{\# of returned family/parent surveys}}{\textit{total student enrollment}}$$

Timeline for Student Survey Administration

Today thru October 31, 2025

- Administer and collect parent opt-out forms

Friday, October 31, 2025

- Parent opt-out forms due from parents/ guardians

Thursday, November 6, 2025

- WV GEAR UP program staff meeting
- Opt-out forms to be returned to ICF at meeting

Monday, December 1, 2025

- Student survey window opens
- Administer online surveys to students who have not opted out

Friday, February 13, 2026

- Student survey windows officially close at 11:59 p.m.

Distributing Parent and Opt-Out Forms

1. **Parent Notification and Opt-Out Forms** will be provided today. Please let ICF know ASAP if you will need additional copies.
 - Susana will provide you with your school's bundle.
2. Distribute **Parent Notification and Opt-Out Forms** to parents/guardians of all students to participate in the survey.
3. Signed opt-out forms will only need to be turned in to site coordinators by those parents/guardians who do not wish for their student to participate in the survey.
4. Store any returned opt-out forms in a safe space and track which students have been opted out of the survey. Please bring any returned opt-out forms to the next WV GEAR UP program staff meeting on November 6.
5. Ensure opted-out students do not participate in the survey. Consider an alternative activity for those students so they are not singled out.

Materials for Survey Administration

1. Survey Packet (Electronic & Paper)

- Electronic copy to be provided on December 1 and a paper copy will be provided. Both versions will include:
 - a. Site Coordinator letter
 - b. Tip sheet to help administer survey
 - c. Online student survey flyer

2. Family/Parent Paper Surveys

- To be mailed to each home by HEPC and also available for completion electronically.
- Site coordinators responsible for pushing out completion of electronic version of survey.
- Timeline TBD (anticipating sending surveys in December or by early January).



Survey Administration Process

Administering Online Student Surveys

1. Refer to the [Student Survey Flyer](#) for the survey links and other ways to access the survey.
Option 1: Follow a short and easy-to-remember URL.
Option 2: Scan the QR codes on the flyer handout found in the survey packet with a web-enabled device.
Option 3: Access the survey from <http://wvgearup.com>.
2. Remind students to click *respond to the entire survey* and click *submit* when they have completed the survey.
3. Use the weekly survey response reports from WVHEPC to identify which of your students have not yet responded.

Family/Parent Survey Raffle

Gathering Family/Parent Survey responses can be challenging!

Every eligible Family/Parent Survey respondent will be entered into a raffle to win a [\\$50 Visa gift card](#).

Once all online and Family/Parent Surveys have been received, ICF will randomly select a WVEIS ID to win the gift card. One winner will be selected from each school. ICF will work with WVHEPC and site coordinators to send the gift cards to each winner.

Please promote the raffle at your school as a reminder to families and parents that their survey responses are important to understanding how WV GEAR UP can continuously enhance the services provided to students and their families!

Who to Contact When You Have Technical Issues

If you encounter technical issues and cannot resolve them on site, *please send a high-priority email to the following addresses, copying your regional program director:*

lesli.taylor@wvhepc.edu

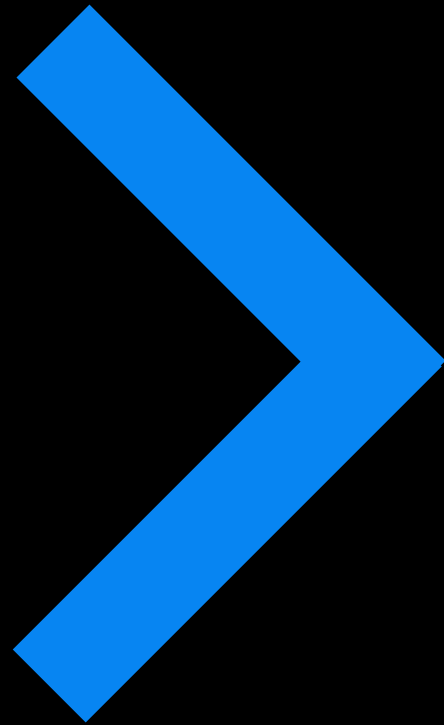
kimberly.good@icf.com

mgattuso@xcalibur.com

Use the following subject line:

“WV GEAR UP Survey Problem (YOUR SCHOOL NAME)”

Describe your issue and someone will get in touch with you to help you through the issue as soon as possible.



Questions?



Thank you for your help in
supporting a successful survey
administration.

We couldn't do this without your
help!



Communications Update

Emily Hammond, Assistant Director of Communications and Outreach

HEROs Social Media Officer Training

- Tomorrow at 11:00 AM via TEAMS
- Covering Social Media Officer duties, best practices, and expectations
- Students should come prepared to take notes!

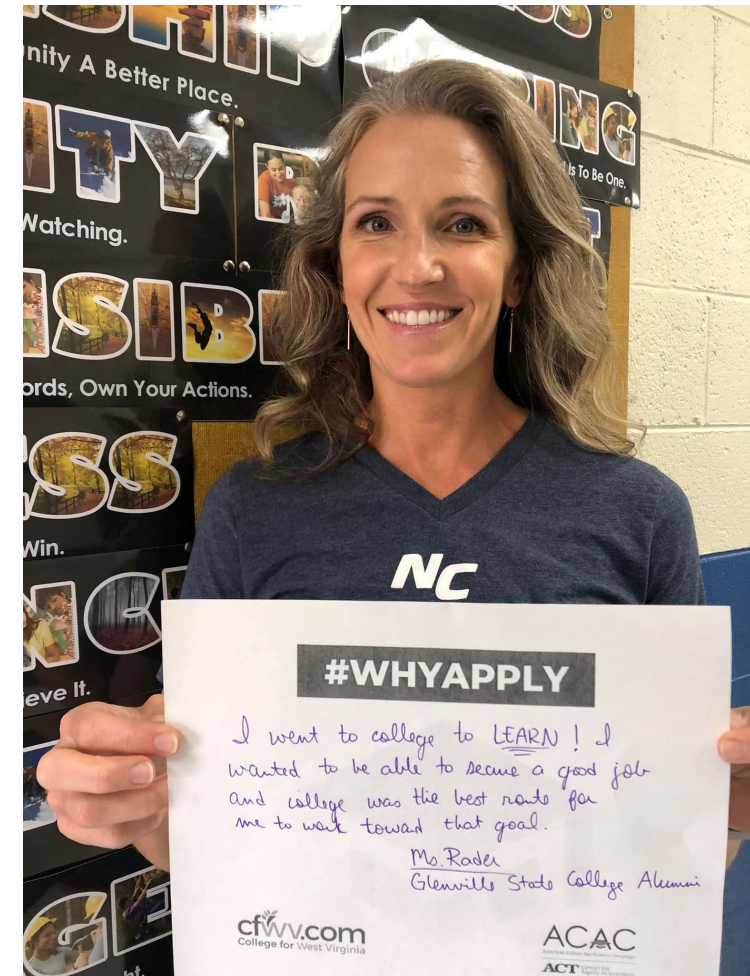


#Why Apply Day

September 19, 2025

What is #WhyApply Day?

- A **national social media campaign** encouraging students to apply to college.
- Sponsored by **American College Application Campaign (ACAC)** in partnership with **College for West Virginia (CFWV)**.
- **Friday, September 19, 2025** – kick off college application season.
- Goal: Show students why college matters—**set an example, share your story, and celebrate futures.**



How Schools Can Participate

- Wear college gear (t-shirts, hats, pins, etc.).
- Share your “Why I Applied” story on Facebook, Instagram, or Twitter/X with #WhyApply and tag @CFWV.
- Encourage staff, students, and families to join in posting, photos, and videos.
- Create visuals: print templates, hold signs, take group photos to showcase support.



Resources and Toolkit

- Visit **cfwv.com/why-apply-day** for the full toolkit.
 - Downloadable social media posts for school pages.
 - Printable signs/templates for photos.
 - Messaging & planning tips for easy participation.
- **Your role:** Lead by example, share your story, and encourage your school community to do the same.



National GEAR UP Week

September 22 — 26, 2025



Planting Seeds. Growing a Nation

- **National GEAR UP Week (NGUW)** will take place **September 22 – 26**
- The theme for this year's NGUW is **“Planting Seeds. Growing a Nation”**
- This week is your school's and community's opportunity to share what GEAR UP means to them and how it makes an impact on students, families, schools, and communities



How can you show your GEAR UP pride?

- Utilize your HEROs and Student Success Society students
- Host a GEAR UP event at your school
- Take short video interviews of students, families, faculty, and staff sharing what GEAR UP means to them
- Take photos of GEAR UP activities in your school
- Plant the NGUW-branded seed packet around your school
- All photos and videos should be shared on social media
 - Tag @WVGear UP
 - Use the hashtag #GEARUPworks



SAT Boot Camp Discussion

Jason Luyster, Senior Director of Student Affairs

SAT Bootcamp RFBs

What do we want it to include?

- Any 10th, 11th, or 12th graders can participate
- Do we want to limit the number that can sign up?
- 3-hour workshop or full day? Morning?
- Best time of the school year or in relation to the exam?
- Anything else?



Mentor Summit and Registration

Chelsea Stickelman, College Access and Success Program Director

Mentor Summit & Registration

- DATE: October 1, 2025
- TIME: 9:30am – 3:30pm
- WHERE: David K. Hendrickson Center
3300 Kanawha Turnpike
South Charleston, WV
25303
- Registration deadline is
September 26, 2025



Scan here to Register





Family Engagement Updates

Jason Luyster, Senior Director of Student Affairs

WV GEAR UP Family Action Network (FAN)

2025–2026 Monthly Webinar Series

6:00pm on the 3rd Tuesday of Each Month

- **September 16, 2025:** Senior Year Launch: Building the College-Going Mindset for Success
- **October 21, 2025:** Demystifying Financial Aid Essentials: Your FAFSA-First Strategy
- **November 18, 2025:** Future Ready: Applications, College, Careers, and Everything in Between
- **December 16, 2025:** The Scholarship Playbook: Exploring All Paths to College Funding
- **January 20, 2026:** Student Success Support: Health, Wellness & Disability Services on Campus
- **February 17, 2026:** They're In—Now What? Supporting Your Student in Choosing the Right College Fit
- **March 17, 2026:** Guiding, Not Steering: Understanding College Today and Trusting Your Student
- **April 21, 2026:** The College Money Map: Understanding Award Letters & Making Sense of Financial Aid
- **May 19, 2026:** Ready for Launch: Preparing Your Student & Family for the College Transition

Expanded GEAR UP Family Engagement Programs

- Monthly FANs Webinar Series
- GEAR UP Survey – incentivized mailings to families
- Parent and Family Advisory Council
- Increasing the other forms of family messaging
- Anything else?



Statewide Access Initiatives Update

Heather McChesney, Director of Statewide Access Initiatives

Statewide Access Initiatives Update

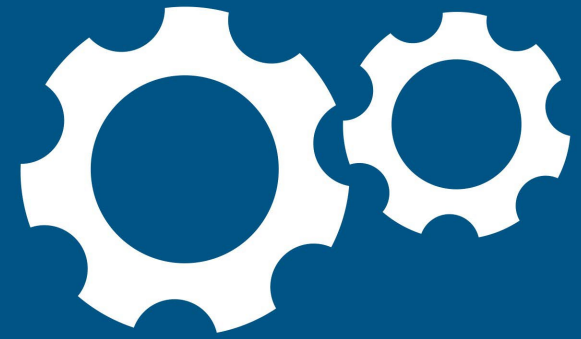
- Champions Expansion Update and Rollout: *Pathways to Champions Events and Registrations*
- 21st Century Scholars
- Txt-4-Success
- #WhyApply Day
- College Fairs and Strive Scan Directions
- Save The Date: Student Success Summit

CHAMPIONS: Expansion Across All Education Levels

- Now includes:
 - Elementary Schools
 - Middle Schools
 - Higher Education Institutions
- Creates a seamless college- and career-readiness pipeline for all WV learners.



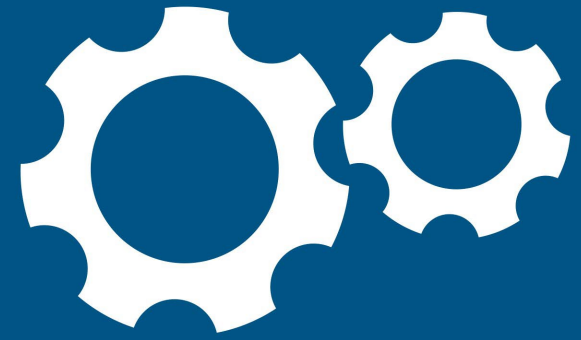
Elementary School Milestones



- College Application and Exploration Week
- School-wide/County-wide Career Day
- Proclamation Day



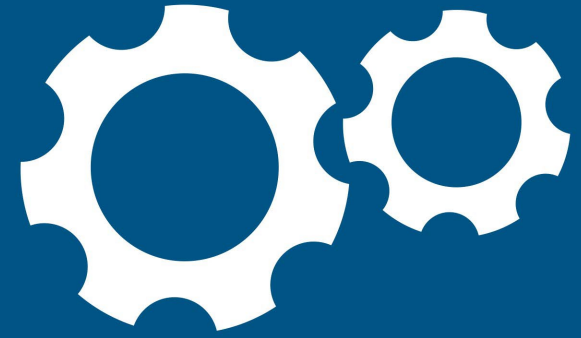
Middle School Milestones



- College Application and Exploration Week
- College Going Culture Survey and Project
- Campus Visit (Virtual or In Person)



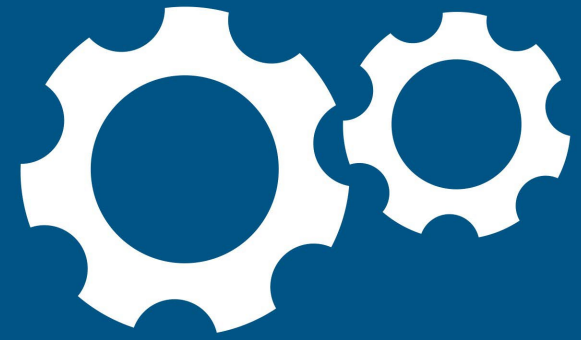
High School Milestones



- College Application and Exploration Week
- FAFSA Completion
- College Decision Day



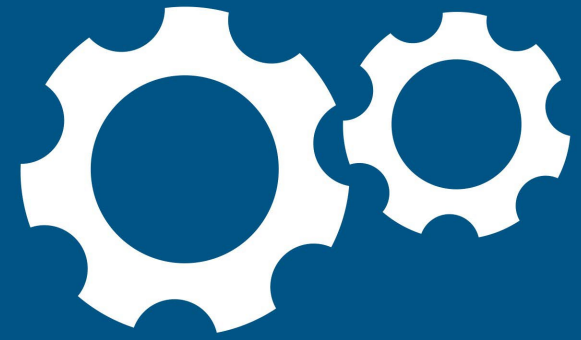
Colleges or Universities Milestones



- Participation in Txt-4-Success
- Waive application fee during CAEW
- Host a site for #WVFAFSA Day
- Participate in First-Generation College Celebration Day



Champions Expansion



- Visit website for details:
<https://www.cfwv.com/champion/>
- Video webinars coming to YouTube soon!
- Register for Pathway Events TODAY!



21ST CENTURY SCHOLARS



CLASS OF 2026 STAND UP AND BE RECOGNIZED!

Set yourself up for success by becoming a College for West Virginia 21st Century Scholar! Scholars who complete the three college-ready milestones will be recognized at the end of the school year with a graduation cord. Scholars must complete the requirements below in order to be recognized.

**Sign up for
TXT 4 Success**

At the start of the school year, sign up to receive college reminders via text by going to cfwv.com or by texting "CFWV" to (304) 912-CFWV. Students ask college-related questions via text and college access advisors will respond.

File the FAFSA


To qualify for financial aid, you must file the Free Application for Federal Student Aid (FAFSA). The FAFSA is the most important step you will take towards meeting your postsecondary goals because all federal financial aid programs, most programs offered by the State of West Virginia, and many programs offered by colleges require you to submit the FAFSA. The FAFSA is free and easy to fill out! You can file the FAFSA for the 2026-2027 academic year by visiting studentaid.gov/fafsa.

Apply for the West Virginia Invests Grant or the Promise Scholarship

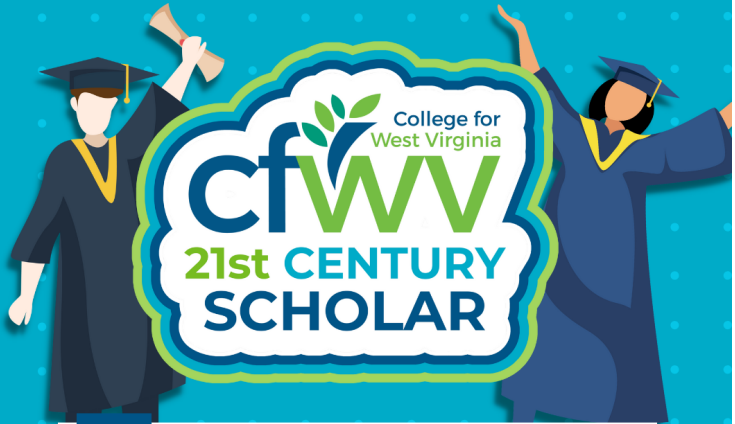
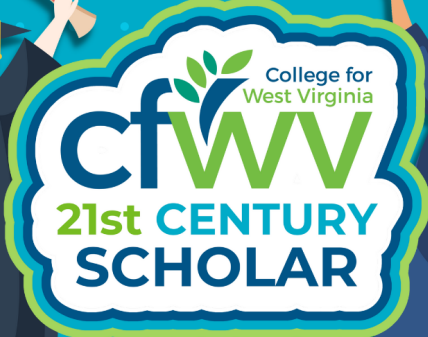
The West Virginia Invests Grant and the Promise Scholarship are both state aid programs that make attending an in-state school more affordable. To learn more about the Invests Grant and the Promise Scholarship, visit CFWV.com.

Plan. Apply. Pay. Succeed.

College for West Virginia is committed to providing the tools and resources necessary for postsecondary success. Take your future into your hands and be honored at graduation for all of your hard work! Students should complete all milestones by **April 15, 2026**.



Counselors, set your seniors up for success! Every senior who completes these three milestones will become a [CFWV 21st Century Scholar](#) and earn a CFWV cord to wear during their graduation ceremony. Complete the first milestone today and sign up for Txt-4-Success!



- ✓ Sign up for TXT-4-Success by texting "CFWV" to (304) 912-2398
- ✓ File the 2026-2027 FAFSA on studentaid.gov
- ✓ Apply for the West Virginia Invests Grant or Promise Scholarship

TXT-4-SUCCESS

Class of 2026

“TXT 4 SUCCESS” & START YOUR COLLEGE EXPERIENCE!

Opt in today by texting “CFWV” to
(304) 912-CFWV (2398) and receive
special text messaging services:

- College Tips
- Important Reminders
- Help from a College Access Advisor
- And More



Now is the time to begin registering your senior students in the Txt-4-Success initiative. Students will begin receiving 2-3 texts per month from CFWV in October. The text messages sent to students serve as general college reminders and advice, such as key deadlines and regular check-ins to ensure students are transitioning well into college life. Students who plan to attend one of our partner institutions will then begin to receive additional messages specific to their college.. Additionally, students who opt in to the service can text anytime to have any of their college questions answered by a college access advisor. For additional information, please visit:

<https://www.cfwvconnect.com/txt-4-success/>

Students may also text "CFWV" to 304-912-CFWV(2398) to enroll in the Texting Program.

#WHYAPPLY DAY



#WhyApply Day is Sept. 19, 2025

What did you learn
in college?

Follow and tag @CFWV

#WhyApply Day is September 19th! Sport your college colors and let us know why you applied or are applying to college. Event toolkit, printouts, and social graphics can be found here: <https://www.cfwv.com/why-apply-day>



COLLEGE Tour Day AND STRIVE SCAN

Register for Your College Barcode

and get scanned to receive more information

Go to:

STRIVEVISIT.COM

or just Snap or scan these codes:



Already have a barcode?

Click [Resend My Barcode](#) at the top of the page and enter your email or phone.

Need to edit your profile?

Use the [Update](#) link in your barcode email, or just re-register.

School Counselors – please remind your students to register for their **StriveScan barcode before attending the college fair**. This quick step will make check-in smoother, save time at each booth, and ensure colleges can follow up with students after the event. Encourage them to register early so they're ready to make the most of their fair experience!



Student Success Summit



July 15-16, 2026

Charleston Coliseum and Convention Center, Charleston, West Virginia

Meeting Adjourned