

# 2024-25 FAFSA<sup>®</sup> Form Clearance Supplemental

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This companion document provides an overview of the user experience on fafsa.gov for the three scenarios above. For data elements captured and questions asked on a particular view, please refer to the questions indicated on the FAFSA PDF for that view. Because this document is not a form that is subject to OMB clearance, please do not submit comments through the public comment period on this document.

\* MFJ = married filed jointly

\*\*FTI = federal tax information

## Scenario 1: Dependent Non-filer with 2 parents who are MFJ and FTI was obtained

Note: This scenario outlines the FAFSA® form web experience for a dependent student (who didn't file a tax return) with married parents who filed their income taxes together and for whom we were able to get tax information from the IRS.

1. User logs into StudentAid.gov
2. User selects 2024-25 FAFSA cycle and starts the FAFSA form in the Student Role
3. Student enters FAFSA form
  - 3.1. **Onboarding views:** The onboarding experience is specific to the logged-in user's role and discusses what the FAFSA form is, roles in the FAFSA form, documents they may need, and what to expect during the form and after submission.
  - 3.2. **Student Identity and Contact Information view**
    - o Refer to questions 1 and 2 on the FAFSA PDF
  - 3.3. **Student State of Legal Residence view**
    - o Refer to question 14 on the FAFSA PDF
  - 3.4. **Student Provide Consent view**
    - o Refer to page 4 on the FAFSA PDF
  - 3.5. **Introduction: Student Personal Circumstances view:** an introduction page to prime the student with what to expect in the section
  - 3.6. **Student Current Marital Status view**
    - o Refer to question 3 on the FAFSA PDF
  - 3.7. **Student College or Career School Plans view**
    - o Refer to question 4 on the FAFSA PDF
  - 3.8. **Student Personal Circumstances view**
    - o Refer to question 5 on the FAFSA PDF
  - 3.9. **Student Other Circumstances view:**
    - o Refer to question 6 on the FAFSA PDF
  - 3.10. **Student Unusual Circumstances view**
    - o Refer to question 7 on the FAFSA PDF
  - 3.11. **Dependent Student view:** student is identified as a dependent student on this view and asked if they are unable to provide parent information.
    - o Refer to question 8 on the FAFSA PDF

- 3.12. **“Who’s My Parent Wizard” view:** this view helps the student identify which parent(s) to invite to their FAFSA using a combination of questions.
- 3.13. **Invite Parent view:** Student provides their parent(s) identity and contact information so that the system can email the parent(s) an invitation to access the FAFSA form.
- o First name
  - o Last name
  - o Date of birth
  - o Social Security number
  - o Email address
- 3.14. **Introduction: Student Demographics view:** an introduction page to prime the student with what to expect in the section
- 3.15. **Student Demographic Information view**
- o Refer to question 11 on the FAFSA PDF
- 3.16. **Student Race and Ethnicity view:**
- o Refer to question 12 on the FAFSA PDF
- 3.17. **Student Citizenship Status view**
- o Refer to question 13 on the FAFSA PDF
- 3.18. **Parent Education Status view**
- o Refer to question 15 on the FAFSA PDF
- 3.19. **Parent Killed in Line of Duty view**
- o Refer to question 16 on the FAFSA PDF
- 3.20. **High School Completion Status view**
- o Refer to question 17 on the FAFSA PDF
  - o *Note: if student indicates they have a HS diploma, continue to “3.21.” If student indicates something other than HS diploma, continue to “3.23.”*
- 3.21. **High School Information view:** students will search for their HS using their HS state, city, and name
- 3.22. **Confirm HS view:** student will confirm their HS selection
- o Refer to question 17 on the FAFSA PDF
- 3.23. **Introduction: Student Finances view:** an introduction page to prime the student with what to expect in the section
- 3.24. **Student Tax Filing Status view**
- o Refer to question 19 on the FAFSA PDF

3.25. **Student Assets view**

- o Refer to question 22 on the FAFSA PDF

3.26. **Introduction: Select Colleges view:** an introduction page to prime the student with what to expect in the section

3.27. **College Search view:** students will search for their colleges using their college state, city and name, or federal school code.

3.28. **Selected Colleges view:** student will view/confirm their college selections.

- o Refer to question 23 on the FAFSA PDF

3.29. End of Entry Check is run for the student section.

- o If errors are found, end of entry related views will display (these views will let the user correct any issues)
- o If no errors are found, user will be directed to **“Review Form Sections” view** (See 3.30 below)

3.30. **Review Form Sections view:** Student can review the answers they have provided in their sections.

3.31. **Student Signature view**

- o Refer to question 24 on the FAFSA PDF

3.32. **Student Section Complete view:** signals to the student that they have completed the student portion of the FAFSA form and that the form cannot be submitted yet because it is waiting on other contributor information.

- o For this scenario, the parent section has not been completed yet.

4. Student exits form.

5. Invited parent(s) receives email invitation to contribute to student’s FAFSA form.

6. Parent navigates to StudentAid.gov and logs in.

7. Parent sees their FAFSA invitation and accepts.

8. Parent enters FAFSA form.

8.1. **Parent Contributing to the FAFSA Form view**

8.2. **Onboarding views:** The onboarding experience is specific to the logged-in user’s role and discusses what the FAFSA form is, roles in the FAFSA form, documents they may need, and what to expect during the form and after submission.

8.3. **Parent Identity and Contact Information view**

- o Refer to questions 30 and 31 on the FAFSA PDF

**8.4. Parent Provide Consent view**

- o Refer to page 4 on the FAFSA PDF

**8.5. Introduction: Parent Demographics view:** an introduction page to prime the parent with what to expect in the section

**8.6. Parent Current Marital Status view**

- o Refer to question 32 on the FAFSA PDF

**8.7. Parent State of Legal Residence view**

- o Refer to question 33 on the FAFSA PDF

**8.8. Introduction Parent Finances view:** an introduction page to prime the parent with what to expect in the section

**8.9. Parent Federal Benefits view**

- o Refer to question 36 on the FAFSA PDF

**8.10. Parent Tax Filing Status view**

- o Refer to question 37 on the FAFSA PDF

**8.11. Parent Family size view**

- o Refer to question 34 on the FAFSA PDF

**8.12. Parent Number in College view**

- o Refer to question 35 on the FAFSA PDF

**8.13. Parent Tax Return Information view**

- o Refer to question 38 on the FAFSA PDF

**8.14. Parent Assets view**

- o Refer to questions 39 and 40 on the FAFSA PDF
- o *Note: This view only displays if it is determined that the parent must provide asset information.*

**8.15. Add Other Parent Info to Form view:** Parent provides their spouse's identity and contact information.

- o First name
- o Last name
- o Social Security number
- o Date of birth
- o Email address

**8.16. End of Entry Check** is run for the entire application.

- o If errors are found, end of entry related views will show to let the user correct any issues

- o If no errors are found, user will be directed to “**Review Form Sections**” view (See 8.17 below).

8.17. **Review Form Sections view:** Parent can review the answers they have provided in their sections.

8.18. **Parent Signature view:** Parent submits FAFSA form with the application of their signature.

- o Refer to question 41 on the FAFSA PDF

8.19. **Parent Confirmation view:** Parent will see an abbreviated version of the confirmation view which signals to user that the FAFSA form has been successfully submitted and provides other information. A more detailed confirmation page is emailed to the student.

## Scenario 2: Independent Unmarried Tax Filer and FTI was obtained

Note: This scenario outlines the FAFSA® form web experience for an independent unmarried student for whom tax information was obtained from the IRS.

1. User logs into StudentAid.gov
2. User selects 2024-25 FAFSA cycle and starts the FAFSA form in the Student Role
3. Student enters FAFSA form
  - 3.1. **Onboarding views:** The onboarding experience is specific to the logged-in user's role and discusses what the FAFSA form is, roles in the FAFSA form, documents they may need, and what to expect during the form and after submission.
  - 3.2. **Student Identity and Contact Information view**
    - o Refer to questions 1 and 2 on the FAFSA PDF
  - 3.3. **Student State of Legal Residence view**
    - o Refer to question 14 on the FAFSA PDF
  - 3.4. **Student Provide Consent view**
    - o Refer to page 4 on the FAFSA PDF
  - 3.5. **Introduction: Student Personal Circumstances view:** an introduction page to prime the student with what to expect in the section
  - 3.6. **Student Current Marital Status view**
    - o Refer to question 3 on the FAFSA PDF
  - 3.7. **Student College or Career School Plans view**
    - o Refer to question 4 on the FAFSA PDF
  - 3.8. **Student Personal Circumstances view:**
    - o Refer to question 5 on the FAFSA PDF
  - 3.9. **Student Other Circumstances view:**
    - o Refer to question 6 on the FAFSA PDF
  - 3.10. **Independent Student view:** student is identified as an independent student on this view.
  - 3.11. **Introduction: Student Demographics view:** an introduction page to prime the student with what to expect in the section
  - 3.12. **Student Demographic Information view**
    - o Refer to question 11 on the FAFSA PDF
  - 3.13. **Student Race and Ethnicity view:**

- o Refer to question 12 on the FAFSA PDF

**3.14. Student Citizenship Status view**

- o Refer to question 13 on the FAFSA PDF

**3.15. Parent Education Status view**

- o Refer to question 15 on the FAFSA PDF
- o *Note: If student is under age 33, continue to “3.16.” If student is 33 or over, continue to “3.17.”*

**3.16. Parent Killed in Line of Duty view**

- o Refer to question 16 on the FAFSA PDF

**3.17. High School Completion Status view**

- o Refer to question 17 on the FAFSA PDF
- o *Note: if student indicates they have a HS diploma, continue to “3.18.” If student indicates something other than HS diploma, continue to “3.20.”*

**3.18. High School Information view:** students will search for their HS using their HS state, city, and name.

**3.19. Confirm HS view:** student will confirm their HS selection

- o Refer to question 17 on the FAFSA PDF

**3.20. Introduction: Student Finances view:** an introduction page to prime the student with what to expect in the section

**3.21. Student Federal Benefits view**

- o Refer to question 18 on the FAFSA PDF

**3.22. Student Family Size view**

- o Refer to question 9 on the FAFSA PDF

**3.23. Student Number in College view**

- o Refer to question 10 in the FAFSA PDF

**3.24. Student Tax Return view**

- o Refer to question 20 on the FAFSA PDF

**3.25. Student Assets view**

- o Refer to questions 21 and 22 on FAFSA PDF
- o *Note: This view only displays if it is determined that the student must provide asset information.*

**3.26. Introduction: Select Colleges view:** an introduction page to prime the student with what to expect in the section



- 3.27. **College Search view:** student will search for their colleges using their college state, city and name, or federal school code.
- 3.28. **Selected Colleges view:** student will view/confirm their college selections.
- o Refer to question 23 on the FAFSA PDF
- 3.29. End of Entry Check is run for the student section.
- o If errors are found, end of entry related views will show to let the user correct any issues.
  - o If no errors are found, user will be directed to **“Review Form Sections” view** (See 3.30 below).
- 3.30. **Review Form Sections view:** Student can review the answers they have provided in their sections.
- 3.31. **Student Signature view:** Student submits FAFSA form with the application of their signature
- o Refer to question 24 on the FAFSA PDF
- 3.32. **Student Confirmation view:** Student will view the confirmation page which signals that the FAFSA form has been successfully submitted and provides information related to their FAFSA submission.

### Scenario 3: Independent married non-tax filer student

Note: This scenario outlines the FAFSA® form web experience for an independent married student (who didn't file a tax return) and thus tax information was not obtained from the IRS.

1. User logs into StudentAid.gov
2. User selects 2024-25 FAFSA cycle and starts the FAFSA form in the Student Role
3. Student enters FAFSA form
  - 3.1. **Onboarding views:** The onboarding experience is specific to the logged-in user's role and discusses what the FAFSA form is, roles in the FAFSA form, documents they may need, and what to expect during the form and after submission.
  - 3.2. **Student Identity and Contact Information view**
    - o Refer to questions 1 and 2 on the FAFSA PDF
  - 3.3. **Student State of Legal Residence view**
    - o Refer to question 14 on the FAFSA PDF
  - 3.4. **Student Provide Consent view**
    - o Refer to page 4 on the FAFSA PDF
  - 3.5. **Introduction: Student Personal Circumstances view:** an introduction page to prime the student with what to expect in the section
  - 3.6. **Student Current Marital Status view**
    - o Refer to question 3 on the FAFSA PDF
  - 3.7. **Student College or Career School Plans view**
    - o Refer to question 4 on the FAFSA PDF
  - 3.8. **Student Personal Circumstances view**
    - o Refer to question 5 on the FAFSA PDF
  - 3.9. **Student Other Circumstances view:**
    - o Refer to question 6 on the FAFSA PDF
  - 3.10. **Independent Student view:** student is identified as an independent student on this view.
  - 3.11. **Introduction: Demographics view:** an introduction page to prime the student with what to expect in the section
  - 3.12. **Student Demographic Information view**
    - o Refer to question 11 on the FAFSA PDF
  - 3.13. **Student Race and Ethnicity view**

- o Refer to question 12 on the FAFSA PDF

**3.14. Student Citizenship Status view**

- o Refer to question 13 on the FAFSA PDF

**3.15. Parent Education Status view**

- o Refer to question 15 on the FAFSA PDF
- o *Note: If student is under age 33, continue to “3.16.” If student is 33 or over, continue to “3.17.”*

**3.16. Parent Killed in Line of Duty view**

- o Refer to question 16 on the FAFSA PDF

**3.17. High School Completion Status view**

- o Refer to question 17 on the FAFSA PDF
- o *Note: if student indicates they have a HS diploma, continue to “3.18.” If student indicates something other than a HS diploma, continue to “3.20.”*

**3.18. High School Information view:** students will search for their HS using their HS state, city and name

**3.19. Confirm HS view:** student will confirm their HS selection

- o Refer to question 17 on the FAFSA PDF

**3.20. Introduction: Student Finances view:** an introduction page to prime the student with what to expect in the section

**3.21. Student Federal Benefits view**

- o Refer to question 18 on the FAFSA PDF

**3.22. Student Tax Filing Status view**

- o Refer to question 19 on FAFSA PDF

**3.23. Student Family Size view**

- o Refer to question 9 on the FAFSA PDF

**3.24. Student Number in College view**

- o Refer to question 10 on the FAFSA PDF

**3.25. Student Assets view**

- o Refer to questions 21 and 22 on FAFSA PDF

**3.26. Invite Spouse to FAFSA form view:** Student provides their spouse’s identity and contact information so that the system can email the spouse an invitation to access the FAFSA form.

- o Refer to questions 25 and 26 on the FAFSA PDF

3.27. **Introduction: Select Colleges view:** an introduction page to prime the student with what to expect in the section

3.28. **College Search view:** students will search for their colleges using their college state, city and name, or federal school code.

3.29. **Selected Colleges view:** student will view/confirm their college selections.

- o Refer to question 23 on FAFSA PDF

3.30. End of Entry Check is run for the student section.

- o If errors are found, end of entry related views will show (these views will let the user correct any issues)
- o If no errors are found, user will be directed to **“Review Form Sections” view** (See 3.30 below).

3.31. **Review Form Sections view:** Student can review the answers they have provided in their sections.

3.32. **Student Signature view**

- o Refer to question 24 on the FAFSA PDF

3.33. **Student Section Complete view:** signals to the student that they have completed the student portion of the FAFSA form and that the form cannot be submitted yet because it is waiting on other contributor information.

- o For this scenario, the student spouse section has not been completed yet.

4. Student exits FAFSA form.

5. Invited student spouse receives email invitation to contribute to student’s FAFSA form.

6. Spouse navigates to StudentAid.gov and logs in.

7. Spouse sees their FAFSA invitation and accepts.

8. Spouse enters FAFSA form.

8.1. **Enter as a Contributor view**

8.2. **Onboarding views:** The onboarding experience is specific to the logged-in user’s role and discusses what the FAFSA form is, roles in the FAFSA form, documents they may need, and what to expect during the form and after submission.

8.3. **Student Spouse Identity and Contact Information view**

- o Refer to question 25 and 26 on the FAFSA PDF

8.4. **Student Spouse Provide Consent view**

- o Refer to page 4 on the FAFSA PDF

- 8.5. **Introduction: Student Spouse Finances view:** an introduction page to prime the spouse with what to expect in the section
- 8.6. **Student Spouse Tax Filing Status view**
- o Refer to question 27 on the FAFSA PDF
  - o *Note: If Spouse answers “Yes” to either “Filed 1040 or 1040NR” or “Filed Non-US Tax Return,” continue to “8.7.” If Spouse answers “No” to both “Filed 1040 or 1040NR” and “Filed Non-US Tax Return”, continue to “8.8.”*
- 8.7. **Student Spouse Tax Return Information view**
- o Refer to question 28 on the FAFSA PDF
- 8.8. End of Entry Check is run for the entire application.
- o If errors are found, end of entry related views will show to let the user correct any issues
  - o If no errors are found, user will be directed to **“Review Form Sections” view** (See 8.9 below).
- 8.9. **Review Form Sections view:** Spouse can review the answers they have provided in their spouse section only.
- 8.10. **Student Spouse Signature view:** Spouse submits FAFSA form with the application of their signature.
- o Refer to question 29 on the FAFSA PDF
- 8.11. **Student Spouse Confirmation view:** Spouse will see an abbreviated version of the confirmation view which signals to user that the FAFSA form has been successfully submitted and provides other information. A more detailed confirmation page is emailed to the student.