

## Preparing ahead of time:

Documents/information to have on hand before beginning the Financial Aid Process:

### Everyone needs:

1. Social Security number or Alien Registration number if you are not a U.S. citizen
2. Birth date (month/date/Year)
3. Exact name as it appears on your social security card
4. Income information such as yet not limited to:
  - a. 2020 Federal Tax information including W-2; IRS 1040 and/or Foreign Tax Returns
  - b. Any other source of taxable/non-taxable income received during 2020 (IRS 1040)
5. Ensure the status you will report on FAFSA is same as status on your income tax form (i.e. Single, married)
6. A valid and constant email (email changes may cause issues further down the road)
7. An area to store a user name/password that you will be prompted to create.
8. Ensure reliable source of internet

### Are you married?

You will need all of the above plus:

1. Spouse's income information for 2020

### Are you a dependent student?

You will need all of the above plus:

1. Parent's income information
2. Parent must be able to create their own SFA ID (instructions in package- Step 1)

### *Not sure whether you'll need your parents' information on the FAFSA form?*

Answer the following questions provided. **If you answer "yes" to one or more questions,** that makes you **independent** for FAFSA purposes. Then you **would NOT need your parent's income information.**

**If all responses are "NO" then you would need your parent's income information** and at least one of them will need to have an SFA ID to electronically sign your FAFSA.

1. Will you be 24 or older by Jan. 1 of the school year for which you are applying for financial aid? For example, if you plan to start school in August 2022 for the 2022–23 school year, will you be 24 by Jan. 1, 2022 (i.e., were you born before Jan. 1, 1999)?
2. Are you married or separated but not divorced?
3. Will you be working toward a master’s or doctorate degree (such as M.A., MBA, M.D., J.D., Ph.D., Ed.D., etc.)?
4. Do you have children who receive more than half of their support from you?
5. Do you have dependents (other than children or a spouse) who live with you and receive more than half of their support from you?
6. Are you currently serving on active duty in the U.S. armed forces for purposes other than training?
7. Are you a veteran of the U.S. armed forces?
8. At any time since you turned age 13, were both of your parents deceased, were you in foster care, or were you a ward or dependent of the court?
9. Are you an emancipated minor or are you in a legal guardianship as determined by a court?
10. Are you an unaccompanied youth who is homeless or self-supporting and at risk of being homeless?

\*If you don’t answer “yes” to any of the questions above, you’re still considered a dependent student for purposes of applying for federal student aid even if you don’t live with your parents, are not claimed by your parents on their tax forms, or are paying for your own bills and educational expenses.

## **Step 1: Create an FSA ID**

### **What's an FSA ID?**

The FSA ID is a username and password you use to log in to U.S. Department of Education (ED) online systems. It is your legal signature and shouldn't be created or used by anyone other than you—not even your parent, your child, a school official, or a loan company representative. You'll use your FSA ID every year you fill out a *Free Application for Federal Student Aid* (FAFSA®) form and for the lifetime of your federal student loans. Keep in a safe place!

### **How do I get an FSA ID?**

Visit [Create Account | Federal Student Aid](#) to create an FSA ID. You'll need your **Social Security number, full name, and date of birth**. You'll also need to create a memorable username and password, and complete challenge questions and answers so you can retrieve your account information if you forget it.

You'll be required to **provide either your email address or your mobile phone number** when you make your FSA ID. Providing a mobile phone number and/or email address that you have access to will make it easier to log in to ED online systems and allow additional account recovery options.

### **FSA ID Tips**

- If you need to provide information about your parents on the FAFSA® form, one of your parents will need an FSA ID to sign the form. Your parent can create an FSA ID and then sign the FAFSA form electronically using that FSA ID. Also, make sure to use the correct FSA ID when signing the FAFSA form electronically.
- When you first create your FSA ID, the use of your FSA ID will be restricted to completing, signing, and submitting an original (first-time) FAFSA form. You'll have to wait one to three days for your information to be confirmed by the Social Security Administration (SSA) before you can use your FSA ID for other actions, such as submitting a FAFSA Renewal or signing a *Master Promissory Note*. If you provided an email address, then you'll receive an email letting you know that your information was successfully matched with the SSA and you can begin using your FSA ID.
- If you forget your FSA ID username or password, look for the "Forgot My Username" and "Forgot My Password," links on log-in pages. These links will direct you to web pages where you can request a secure code to be texted to your verified mobile phone number or emailed to your verified email address. The secure code will allow you to retrieve your username or reset your password. You can also retrieve your username or reset your password by successfully answering your challenge questions. **Remember:** If you verified your email address or mobile phone number during account creation, you can enter your email address or mobile phone number instead of your username to log in.

## Step 2: COMPLETING YOUR FAFSA- USING SCHOOL CODE 034224.

- It is very important that you follow these instructions to avoid any delay with the processing and/or disbursement of your financial aid funds. You will be prompted to enter our school code. Enter: **034224.**
- Access the FAFSA application using this link: [Apply for Financial Aid | Federal Student Aid](#)
- Answer the questions provided on application as thoroughly and accurately possible.
- In the *Finances Section* of the Online form you will see a “**Link to IRS**” button if you are eligible to use the IRS Data Retrieval Tool (DRT). If eligible, you must click the link button and login with your FSA ID to be transferred to the IRS to retrieve your info.
- Once at the IRS site, enter your information exactly as it appears in your federal income tax return and click the “**Submit**” button.
- Check the “**Transfer My Tax Information into the FAFSA form**” box and click the “**Transfer Now**” button.
- You will know that your federal tax return information has been successfully transferred because the words “**Transferred from the IRS**” will display in place of the IRS information in your FAFSA form.
- IF you are not eligible to utilize the Data Retrieval Tool (DRT), then manually enter the data from your Tax form using your 2020 IRS Tax information or other income.
- See below the simple steps explained above:

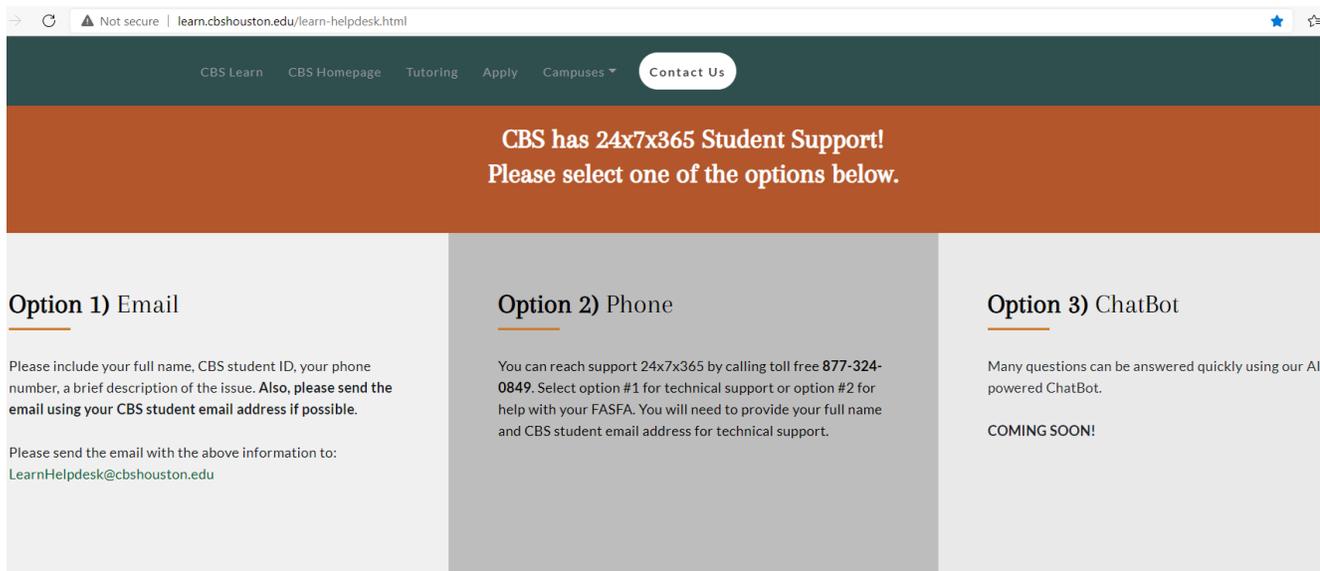


- If you need to request a tax transcript, you may request it at:
  - [Get Transcript | Internal Revenue Service \(irs.gov\)](#)

If dependent your parent will sign your FAFSA using the SFA ID created for their personal electronic signature.

## Doubts Completing The FAFSA?

**CBS provides student support for FAFSA completion 24 hours a day, 7 days a week, 365 days of the year. You may email inquiries to [LearnHelpdesk@cbshouston.edu](mailto:LearnHelpdesk@cbshouston.edu) or call 877-324-0849 for FAFSA guidance.**



The screenshot shows a web browser window with the URL [learn.cbshouston.edu/learn-helpdesk.html](http://learn.cbshouston.edu/learn-helpdesk.html). The page has a dark green header with navigation links: CBS Learn, CBS Homepage, Tutoring, Apply, Campuses, and a Contact Us button. Below the header is a brown banner with the text: "CBS has 24x7x365 Student Support! Please select one of the options below." The main content area is divided into three columns:

- Option 1) Email:** "Please include your full name, CBS student ID, your phone number, a brief description of the issue. Also, please send the email using your CBS student email address if possible. Please send the email with the above information to: [LearnHelpdesk@cbshouston.edu](mailto:LearnHelpdesk@cbshouston.edu)"
- Option 2) Phone:** "You can reach support 24x7x365 by calling toll free 877-324-0849. Select option #1 for technical support or option #2 for help with your FASFA. You will need to provide your full name and CBS student email address for technical support."
- Option 3) ChatBot:** "Many questions can be answered quickly using our AI powered ChatBot. COMING SOON!"

Call our toll-free 24x7  
FASFA Helpdesk at  
877-324-0849  
and select option #2

Need help

## What Happens After You Complete Your FAFSA?

- After you submit your FAFSA application you will receive a copy of your Student Aid Report (SAR) via email. This document will inform you if you are eligible for the Federal PELL grant and provide you with your EFC number. **Review your Student Aid Report (SAR).**
- If you **did not** or **were not required** to file taxes in 2020 you may need to obtain a non-tax filer form from the IRS. Do not request this form until you are notified you need it. Non-Tax filers can request an IRS Verification of Non-filing of their 2020 tax return status, free of charge, from the IRS online. If needed, instructions will be provided. Our financial aid processing team will also need you to complete our internal non-tax filer form. This form will be provided for you.
- The Student Aid Report will also let you know if you have been selected for verification. If you are selected for verification it will be important to make sure you obtain all the items needed to complete the verification process. You will be notified of the documents needed as soon as you complete Step 3 in the Financial Aid process.
- **You must have received the Student Aid Report (SAR) in order to continue on to Step 3 in the Financial Aid Process.**

### Step 3: COMPLETING YOUR MYFA PORTAL

When you have received the Student Aid Report (SAR), then you may complete your Financial Aid Portal (MyFA).

- Determine what campus you will be attending in order to select the correct link:
  - Houston Campus: <https://auth.globalfas.com/ssite/2400?BranchID=2400>
  - Indiana Residents-attending Pyramid Campus: <https://myfa.globalvfs.com/student/logon.dll?BranchID=2401>
  - Indiana Residents-attending Ft. Wayne: <https://myfa.globalvfs.com/student/logon.dll?BranchID=2402>
  - Online Campus students: <https://myfa.globalvfs.com/student/logon.dll/logon?branchid=2404>
- Once on the MyFA portal:
  - ***New students***: Click on “Sign Up”
  - ***Continuing students***: Log in to your specific campus MyFA portal using your MyFA Portal credentials.
  - ***Indiana students enrolled in “teach-out” programs***: contact the Financial Aid Department.
- When you log in select the correct term from the dropdown menu. (i.e. **07/05/2022 -Fall** or 01/02/2023 – Spring).
- Follow the instructions to complete each of the following sections displayed on the screen as a checklist:
  - Apply for Financial Aid
  - ISIR Status
  - Required Documents
  - Award Package
- **If you are not going to participate in federal loans, enter 0 in the loans to decline.**
- If you are going to request federal loans and this is your first time receiving them, you must also complete the loan entrance counseling included in your MyFA portal.
  - Students participating in federal loans must complete a Master Promissory Note (MPN). Access this document at: [Completing a Master Promissory Note | Federal Student Aid](#).
- When prompted to enter Enrolled hours, try to be as accurate as possible.
- When you complete the financial aid process on the MyFA portal and submit your award package for review and approval, wait 7-10 business days for the review and approval process to be complete.

- If you are required to provide additional documentation, you will be notified via email and/or SMS text for further instructions. A list of documents required will be listed in the “Complete Required Documents” Section within your MyFA portal.
- If your financial aid package is approved, you will receive your Award/Offer letter via email.

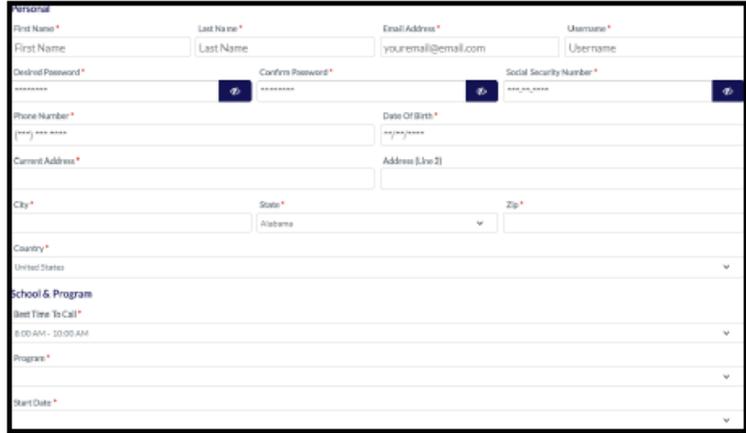
## Doubts Completing your MyFA Portal?

Follow the steps to log in correctly:

### Student Login Instructions

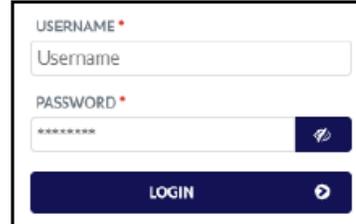
#### Step One: Sign Up

1. Select **Sign Up**. 
2. Complete all fields.



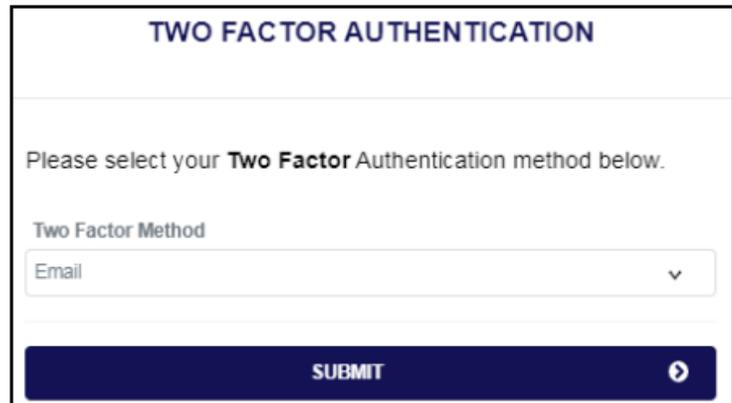
#### Step Two: Login

1. Provide Username and Password.
2. Select **Login**.



#### Step Three: 2 Factor Authentication

1. Choose either email or SMS/Text Notification to receive a 2-Factor Authentication code.
2. Provide the code in the site.



**If you have additional inquiries *after* having read and attempted the steps established in this Financial Aid Process guide, then email:**

FAFSA inquiries [LearnHelpdesk@cbshouston.edu](mailto:LearnHelpdesk@cbshouston.edu)

MyFA inquiries [fa@cbshouston.edu](mailto:fa@cbshouston.edu).

Revised 03/22/22 HS