

## FAFSA Workshop Agenda

There are two back to back sessions offered.

Session 1: User ID's. This session is for those who have not setup a FAFSA ID (FSAID) yet.

Session 2: FAFSA Filing. This session is for families who have already setup an FSAID for the student and one parent, and verified that they work.

Equipment: Bring a laptop and cell phone. EPR will provide guest wireless service.

### PREP WORK BEFORE ATTENDING THE USER ID WORKSHOP

1. Ensure you have access to your student's email, either through your laptop or by having the student available for a phone call to get information that is sent to the student's email address.
2. You will need social security numbers and birthdates for both the student and the parents.

### PREP WORK BEFORE ATTENDING THE FAFSA FILING WORKSHOP

1. If not already done so, try to setup a user id and password for the student(s) and one of the custodial parents
2. Go to <https://fsaid.ed.gov> and click on the "Create an FSA ID" tab to setup the logins. You will need to have access to the parent's email & cell phone as well as the student's email and cell phone.
3. Hint: When choosing the recovery questions, choose questions that contain single word, unmistakable answers. Also, use an email address that can be accessed for years to come – don't use a current high school email that may not be available in a year.
4. If you have questions, you can call us at (248) 359-8300
5. If you have setup the login credentials, be sure to test that they work by going to <https://fsaid.ed.gov> and clicking on the "Manage my FSA ID" tab.

## WHAT TO BRING TO THE FAFSA WORKSHOP

1. A laptop with a wireless connection. EPR will provide a secure wireless connection for you to file the FAFSA.
2. FSA ID's for Parents and Students along with usernames, email associated with the account and passwords
3. Copy of Parents' 2017 IRS Form 1040
4. Copy of Student(s)' 2017 IRS Form 1040, 1040EZ, etc.
5. Copy of all Parent W-2's from 2017 and/or 1099's
6. Copy of all Student W-2's from 2017 and/or 1099's
7. Social Security Numbers for parents and students (These will not be supplied to EPR, they are only for verification purposes for you to file the FAFSA)
8. Account balances for the Parents and Students of any non-qualified funds, i.e., checking account, savings account, CD's, money markets, brokerage accounts, equity in second and additional homes, etc. You **do not need** balances in any retirement accounts, such as 401(k)'s, IRA's, Pensions, or balances of any accounts for students who will not be attending college.
9. A list of the colleges the student(s) will be applying to.
10. Access to email for the student and parents.

## AGENDA

- Review the FAFSA Changes for 2018-2019
- How does the FAFSA impact your ability to receive Financial Aid?
- What to do if you make a mistake
  - What mistakes can be corrected?
  - How to make corrections
  - How to handle special circumstances such as child support, income reduction, grandparent 529's, work study
- Follow up action steps after the FAFSA is filed.
- Activity with Group & Breakout Sessions
  - Setup Login ID's
  - Input info on FAFSA
  - Have EPR Staff review your information for correctness
  - Calculate your EFC before filing the FAFSA
  - Complete the IRS Data Retrieval Tool
  - Submit your FAFSA
  - Questions and answers from the audience

Note: In the event you are not able to complete your FAFSA for any reason, you will be given the opportunity to setup a private appointment with an Education Specialist from EPR, via phone or in person, within the next few days.

Events are held at our office in Southfield:

Education Planning Resources  
21415 Civic Center Dr Suite 210  
Southfield, MI 48076  
248-359-8300

Parking: Park in the back of the building. It is the Enterprise Center building. Take the elevator to the second floor, turn right out of the elevator and follow the hallway around to EPR in Suite 210.

Outside doors are automatically locked at 7:00pm. If the door is locked, call us at the number above and we will have someone let you in.