HOW TO APPLY FOR FINANCIAL AID
2012-2013

Filling out the FAFSA and TAP applications are the first steps you must complete in order to determine your eligibility for Federal and State Financial Aid, *including grants and student loans.*

1. Find your active PIN #'s or obtain new PIN #'s online at www.pin.ed.gov.

- ***Dependent Students***: You need a PIN # for yourself AND one of your parents.
- ***Independent Students***: You need PIN # only for yourself.

2. Fill out the FAFSA online at www.fafsa.ed.gov. (See reverse for a list of documents needed)

1. ***Dependent Students:*** You AND your parent must sign using your respective PIN #'s.
2. ***Independent Students:*** Only you must sign electronically using your PIN #.
3. ***IRS Data Retrieval Tool-*** The government is utilizing the IRS data retrieval tool to acquire your tax information required by the application. This function is available 2 weeks after you electronically file your tax return. When you reach the point in the application asking for financial information, utilize the tool by following these steps:

   1. Entering the PIN of the person whose tax record is being retrieved and Link To IRS
   2. Your FAFSA will be saved and you will be transferred to the IRS Web site.
   3. On the IRS Web site, enter the requested information.
   4. Once the IRS has validated your identification, your IRS tax information will display. Transfer your information from the IRS. If you do not transfer the information you will have to login to open your saved FAFSA.
   5. Once you transfer your IRS tax information, questions that are populated with tax information will be marked with "Transferred from the IRS."

3. Apply for TAP

On the FAFSA confirmation page, click on the link to apply for New York State TAP.

Congratulations, Sue! Your FAFSA on the Web Application was successfully submitted to Federal Student Aid.

- **Optional Feature - Transfer your parents' information into another FAFSA -** Do your parents need to complete a FAFSA for your brother or sister? Click here and all the information your parents provided in this application will be transferred to a new FAFSA. Your parents will have to provide a signature again, but that's all.
- **Optional Feature - Start your state application -** Click here if you want to apply for New York state-based financial aid.

Click Here

If you forget to click the link to apply for TAP: Wait 3 business days from the date you submitted the FAFSA, then apply for New York State TAP online at: **www.tapweb.org**. **If you are unable to apply for TAP online:** A paper application will be mailed to you, or you can contact HESC directly to obtain a paper application by calling: 1-888-697-4372.

What's Next?

Within 2-4 weeks from the date you submit the completed FAFSA, you will receive notification from OCC's Financial Aid Office. If we need more information to process your application, we will notify you. If we do not need more information, you will receive an award letter. Please check Web Access to see the status of your application or for a list of documents needed. If you do not hear anything from us within 2-4 weeks, please call our office at (315) 498-2291 to inquire.

BEFORE BEGINNING THE FAFSA
Documents Needed

ALL STUDENTS WILL NEED:

- ☐ Your social security number. Be sure it is correct!
- ☐ Your driver's license **(if any)**
- ☐ Your 2011 W-2 forms and other records of any money earned
- ☐ For the IRS DATA RETRIEVAL TOOL- your (and your spouse's, if you are married) 2011 Federal Income Tax Return
    - IRS 1040, 1040A, 1040EZ
    - Foreign Tax Return, or
    - Tax Return for any U.S. territories
- ☐ Your current bank statements
- ☐ Your 2011 untaxed income records. Be sure it is accurate.
    - Veteran's non-education benefit records
    - Child support income received
    - Worker's compensation
- ☐ Your current business and investment mortgage information, business and farm records, stock, bond and other investment records
- ☐ Your alien registration or permanent resident card (if you are not a U.S. citizen)

DEPENDENT STUDENTS (*UNDER* 24 years of age) WILL NEED:

- ☐ Your parents' social security number. Be sure it's correct!
- ☐ For the IRS DATA RETRIEVAL TOOL-your parents' 2011 federal income tax return
    - IRS 1040, 1040A, 1040EZ
    - Foreign Tax Return, or
    - Tax Return for any U.S. territories
- ☐ Your parents' 2011 W-2 forms and other records of any money earned
- ☐ Your parents' current business and investment mortgage information, business and farm records, stock, bond and other investment records
- ☐ Your parents' 2011 untaxed income records. Be sure it is accurate.
    - Veteran's non-education benefit records
    - Child support income received
    - Worker's compensation

Note: Most parent and student tax filers will now be required to utilize the IRS data retrieval tool on the FAFSA to complete income information on the form.

KEEP THESE RECORDS. YOU MAY NEED THEM AGAIN IN COMPLETING THE FINANCIAL AID PROCESS WITH YOUR ACADEMIC INSTITUTION!