



# 2017 California High School Counselor Workshop Workbook

For the 2018-19 Financial Aid Year

This workshop is conducted through a partnership of the California Student Aid Commission (CSAC), the California Association of Student Financial Aid Administrators (CASFAA), and The California Community Colleges Student Financial Aid Administrators Association (CCCSFAAA). Visit [www.csac.ca.gov](http://www.csac.ca.gov) or [www.casfaa.org](http://www.casfaa.org) for online versions of this guide.

*This workbook is provided through the generous support of ECMC for the High School Counselor Workshop Series.*



August 2017

Dear High School Counselor,

Welcome to the annual Financial Aid High School Counselor Workshop series! This is a partnership effort of the California Association of Student Financial Aid Administrators (CASFAA), the California Community Colleges Student Financial Aid Administrators Association (CCCSFAAA), the Educational Credit Management Corporation (ECMC), and the California Student Aid Commission (Commission).

CASFAA is an all-volunteer organization of California college and university financial aid administrators. CCCSFAAA is an organization dedicated to supporting the effective administration of financial aid programs in California. ECMC is a nonprofit corporation providing services in support of higher education finance to plan and pay for college. And the Commission is the principal state agency responsible for administering financial aid programs for students attending public and private universities, colleges, and vocational schools in California. The Commission has never wavered from its central mission to make education beyond high school financially accessible to all Californians.

CASFAA provides training on the federal financial aid application and processes as well as other aid available for students. The CASFAA High School Relations Committee works with our college financial aid administrators, Commission staff, and supporting partners like CCCSFAAA and ECMC to offer training to high school counselors and staff.

Our 2017 High School Counselors Workshop series are scheduled to run from August 25, 2017 through October 17, 2017. In an effort to increase our coverage to some underserved areas across the State, we have significantly increased the number of locations this year for a total of 35 half-day workshops. More than 4,500 counselors, advisors, and staff from California high schools have registered to attend!

You will have an opportunity to learn about the latest news regarding the Free Application for Federal Student Aid (FAFSA) and the California Dream Act Application; in addition to an overview of the Cal Grant awarding process and timelines, and other financial aid programs that are available to your students. We are hoping to equip you with the key resources available to you to best assist your students in navigating the financial aid process in their transition to college.

This booklet contains the slide presentation offered at today's workshop and web resources with specific links to references that will assist you throughout the year.

Thank you for taking the time out of your busy schedule to join us for training today. We appreciate your dedication and all of the work you do to prepare students for college. We look forward to an informative and fun workshop series.

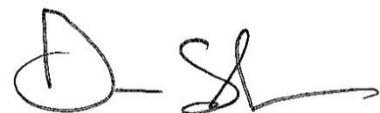
Sincerely,



Lupita Cortez Alcalá  
Executive Director  
California Student Aid Commission



Anafe Robinson  
Co-Chair  
CASFAA High School Relations



Dennis Schroeder  
Co-Chair  
CASFAA High School Relations

# California Student Aid Commission

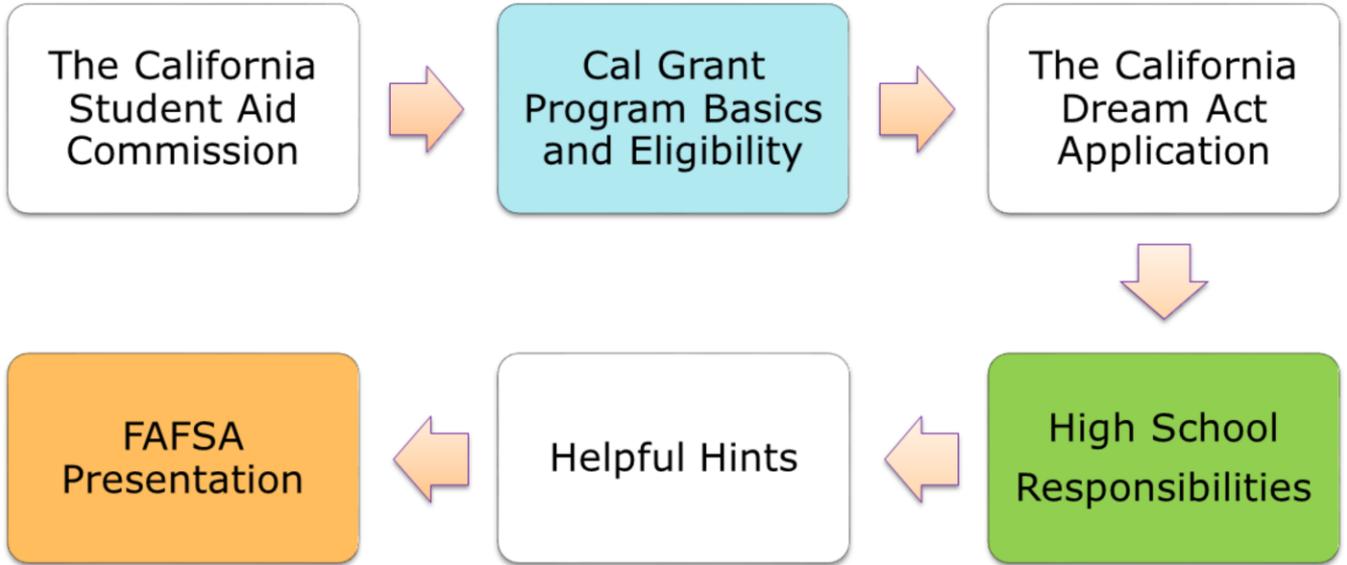
## **2017 CASFAA/CSAC High School Counselor Workshop**

Presented by:  
The California Student  
Aid Commission





# Agenda



*Making education beyond high school financially accessible to all Californians.*

# California Student Aid Commission

- Created in 1955
- Administers more than \$2 billion in financial aid

## Institutional Support Unit

- Provides Training & Webinars
- High School Counselor Workshops
- WebGrants Support
- High School GPA Upload & Matching/Editing Support



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The Commission was created by the Legislature in 1955 and continues to operate as the principal state agency responsible for administering financial aid programs for students attending public and private universities, colleges, and vocational schools in California.

Each year, the state invests about \$2 billion in scholarships called Cal Grants for roughly 360,000 students from low-income families. Those grants help cover the cost of tuition and fees for more than 60 percent of California State University students and more than half of those enrolled at a University of California campus or a community college.

The Commission's Institutional Support Unit is made up of 9 staff members who provide support to high school counselors as well as college financial aid staff on a daily basis via email and phone. As part of the customer support available to high school counselors, the Institutional Support unit offers in-person training, the annual high school counselor workshop series, monthly live webinars, WebGrants support for GPA uploads and matching process, as well as regular communications through the Commission's Special Alerts, Operations Memos and quarterly newsletter.

# Commission Programs



**CALGRANT**  
Making college financially accessible  
**1-888-CA-GRANT**

**California Chafee Grant**

*Free Money for Foster Youth  
for College or Technical and Career Training*



**Law Enforcement Personnel  
Dependents Grant**

**California National Guard  
Educational Award  
Assistance Program**



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Though we are best known for the Cal Grant, which is the largest program that the Commission administers, we also offer students financial assistance for higher education through the Middle Class Scholarship, Chafee Grant for Foster Youth, Law Enforcement Personnel Dependents Grant and the California National Guard Educational Award Assistance Program.

- The Chafee Grant is available to students who are or were in foster care between the ages of 16 and 18. Please see additional information on the resource section of the workbook.
- The Law Enforcement Personnel Dependents Grant is for dependents and spouses of peace officers and firefighters who were either permanently disabled or passed away while in the line of duty.
- The California National Guard Educational Award Assistance Program is for students who are active members of the California National Guard.

Please visit our website ([www.csac.ca.gov](http://www.csac.ca.gov)) to learn more about each program.



# Middle Class Scholarship

## Enrollment Requirements

- Must be enrolled at a UC or CSU
- Must be enrolled at least ½ time
- 1<sup>st</sup> Undergraduate program
- Income ≤ \$165,000
- Assets ≤ \$165,000

- UC Maximum award amount: **\$5,051**
- CSU Maximum award amount: **\$2,298**

*Only for students who have less than 40% of their UC or CSU fees covered by grants and scholarships*

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Students enrolled at a UC or CSU whose income exceeds the limits for Cal Grant A or B, will automatically be considered for the Middle Class Scholarship if they applied on time with the FAFSA or the California Dream Act Application. In order to be eligible, students must be enrolled at least half time in their first undergraduate program, meaning they cannot have previously earned a bachelor's degree.

Only students who have less than 40% of their UC or CSU fees covered by grants and scholarships are eligible to receive the Middle Class Scholarship. Additionally, students have income of \$165,000 or less and assets of \$165,000 or less.

Sometimes students do not apply for aid because they believe their family makes too much money to get an award, but that is not always the case. It is important that we encourage all students to apply for financial aid early so that they get consideration for all programs.

One interesting really positive thing about the Middle Class Scholarship is how much the maximum award amount has increased. When the Middle Class Scholarship first rolled out in 2014-15, the maximum award amounts were \$1,704 at a UC and \$768 at a CSU. Now fully phased in, we can see how dramatically those amounts have risen.

Hello!



*Making education beyond high school financially accessible to all Californians.*

Our common goal is to get students through high school and in a position to afford college. Let us meet one of those students.

Diana is a freshman this year. She will need your help to navigate through high school and get the financial aid she needs to attend college.

# High School



For Diana, like for most students, the path from high school freshman to college student is almost never easy. It is an obstacle course. Students not only need to traverse all of the course requirements, tests, assessments and mandated student plans, but they have to do so while they are dealing with all of the other things that come with being a high school student.

Things like making new friends, extracurricular activities, learning to drive, part-time jobs, playing competitive sports, relationships and of course, a locker that is impossible to open! All of those things that make up high school.

High School counselors play a critical role in helping students like Diana reach their education goals.

# California Student Aid Commission

## Cal Grant Basics





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The Cal Grant Application has 2 components: both of which must be completed by the March 2<sup>nd</sup> deadline.

1. FAFSA or California Dream Act Application (CADAA)

- Deadline: March 2nd
- FAFSA – [www.fafsa.ed.gov](http://www.fafsa.ed.gov)
- CADAA – <https://dream.csac.ca.gov>

2. Verified GPA

- Deadline: October 1\*
- Method: Electronic submission via WebGrants

\*Deadline applies to all public and charter schools per California Ed Code 69432.9. All other schools have until March 2<sup>nd</sup> but are encouraged to submit their GPAs by October 1<sup>st</sup> as well.

# CA Education Code 69432.9

- Mandates all high schools (public and charter) to upload GPAs for all enrolled seniors by **October 1st**
- Provide students/parents opt-out option no later than **January 1st** of junior year
- Verify high school graduation by **August 31st** of academic year following graduation



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In 2015, Assembly Bill (AB) 2160 made changes to the CA Education Code section 69432.9. Specifically, the passing of AB 2160 and additional updates to the CA Education Code have mandated for all public and charter high schools to:

- Electronically upload Non-SSN GPAs for all seniors by October 1<sup>st</sup> of each academic year, except for those students who have opted out.
- Create an opt-out option for students and parents.
  - Schools must provide this opt-out option to students no later than January 1<sup>st</sup> of the student's junior year.
  - We recommend that schools use passive permission for this opt-out process. For example, an e-mail to parents which states that parents must respond in order to have their student opted out of the electronic upload process.
  - Schools can create their own Opt-out form or use the one available on the Commission website.
- Verify high school graduation by August 31<sup>st</sup> of the academic year following graduation.

# High School GPA

- Use grades from *sophomore year and junior year* for **current seniors**
- DO NOT include grades from P.E., ROTC, or remedial courses (as defined by the school)
- Failing grades not retaken must be included
- Calculate the GPAs on unweighted 4.00 scale

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For your current High School seniors, no Freshman & no Senior coursework is factored into the calculation.

- You will only use completed coursework from the 10<sup>th</sup> grade, summer after 10<sup>th</sup> grade, the 11<sup>th</sup> grade and the summer after the 11<sup>th</sup> grade.
- P.E., ROTC and Remedial Coursework is not to be included. The Commission cannot define remedial coursework for high schools, this is identified by the school or district.
- Unfortunately, all failing grades are to be included, unless the same class was re-taken during the identified time frame in the first bullet.
- Acceptable GPAs are un-weighted; calculated using a 4.00 GPA scale. GPAs over 4.00 will be rejected.

# GPA: Prior Year Graduates

- Use grades from *sophomore to senior year* for **prior year graduates**
- Recent graduates have a 2 year window to qualify for an Entitlement Cal Grant
  - The year they graduate
  - The year after they graduate
- 2<sup>nd</sup> chance opportunity to qualify
  - Using Sophomore – Senior grades



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For students that *have* graduated high school the year prior:

- Use only completed coursework from the 10<sup>th</sup> grade, summer after 10<sup>th</sup> grade, 11<sup>th</sup> grade, the summer after the 11<sup>th</sup> grade, senior year and the summer after senior year.
- All other rules still apply as with current seniors.

Uploading GPAs for your “One-Year-Out” students is important because often times those grades will put a student over the 2.0 or 3.0 GPA minimums for a Cal Grant award.

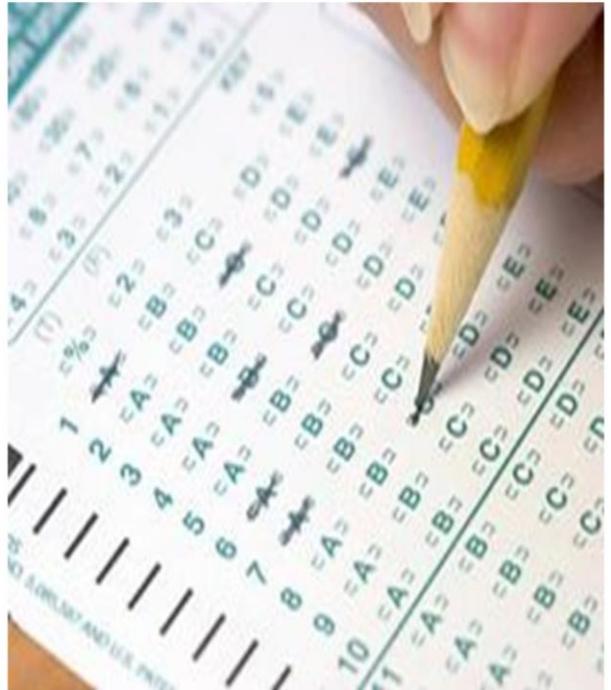
# Alternative Academic Qualifiers

## Test Scores

- SAT
- ACT
- GED
- HiSet
- TASC

## Allowed if:

- student **does not** have a GPA
- has coursework that cannot be converted to a 4.00 maximum GPA
- attended a non-accredited high school



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As stated before, the student's GPA is a factor in the award process. If a student does not have a qualifying GPA, because their school is not accredited or grades were based on pass/fail, then the student can submit proof of passing a high school equivalency test such as the GED, SAT, ACT, High School Equivalency Test (HiSET) and Test Assessing Secondary Completion (TASC) test scores.

If a student has a valid GPA, the student must use this GPA and cannot use test scores in lieu of.

# Remember: October 1, 2017



**MARK YOUR CALENDARS**

- 2018-19 FAFSA & California Dream Act Application Opens
- GPAs are due

October 1<sup>st</sup> is an important date for two reasons:

1. 2018-19 FAFSA and California Dream Act Application become available for completion
2. GPA submission deadline for public and charter high schools

The Early FAFSA/California Dream Act Application ultimately benefits students and families as it gives them an additional three months to complete their financial aid application. Equally important, the earlier application window means that students can be notified much earlier of what financial aid they may qualify for – which is extremely beneficial when considering what college to attend.

As previously discussed, October 1<sup>st</sup> is also the GPA submission deadline for all public and charter schools. Not only is this a requirement per California Education Code 69432.9, but it is also in the best interest of the student and for the high school because GPAs that are in the system by October, may yield award notifications as soon as November. The later GPAs are submitted, the later students can be processed for award consideration, which ultimately means less time for students and their families to properly plan for college.

# Cal Grant Early Award Notification

With my GPA on file by October, I will get Cal Grant information in November!



This year, high schools had the ability to submit GPAs as early as May.

All high schools are encouraged to submit GPAs by October 1<sup>st</sup> in order to assist their students in receiving early award consideration.

Students can be notified of an award as early as November 1<sup>st</sup> if we have their financial aid application and GPA on file early on to process them for Cal Grant consideration. This information can assist students in making informed decisions about college planning and preparation.

# Cal Grant Eligibility Notification






*Making college financially accessible*

## Cal Grant Eligibility Notification

- «STUDENTNAME»
- «STREET»
- «CITY»

Date

Grant ID Number

CSAC ID Number

Academic Year

«CALGRANTDATE»

«GRANTID»

«CSACID»

«ACAD\_YR»

The California Student Aid Commission is the state agency responsible for awarding Cal Grants and other state financial aid. Based on the self-reported information on your Free Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADAA) and Grade Point Average (GPA), we have determined your preliminary Cal Grant eligibility for the 2017-18 academic year.

Cal Grant award amounts vary by type of college. These are the current Cal Grant maximum award amounts that you could be eligible for if you enroll at least half time at an [eligible campus](#) from the following segments:

College Segment	Maximum Cal Grant Award Amount
California Community College (CCC):	\$1,670
California State University (CSU):	\$5,472*
University of California (UC):	\$12,294*
Private, Non-Profit or WASC-accredited colleges:	\$8,056*
Non-WASC accredited For-Profit Colleges:	\$4,000*

\*Cal Grant B students may also receive a \$1,070 access award in addition to the amount listed above

In order to confirm your eligibility, it is essential that you complete these easy steps:

1. Go to [www.webgrantsforstudents.org](http://www.webgrantsforstudents.org) and Click the link to "Create an Account" OR log into your existing account.
2. Select "Cal Grant" from the Options to go to the Cal Grant Main Menu and view any outstanding requirements.
3. Starting in February 2017, you will need to confirm the campus you plan to attend OR submit a school change if the college listed is not correct.
4. Go to "Understanding My Cal Grant" (Main Menu) for more information about Cal Grant awards.
5. Keep your email and contact information updated. We communicate with you using email, so make sure you check your email and Webgrants for Students account for updates. Keep your password private.

Remember that the Cal Grant is FREE money, and only one part of your financial aid package. After you are offered admission, the financial aid office will provide a full financial aid award notice. In addition to a Cal Grant, you may also be eligible for one or more of the following:

- Federal Pell Grant, Work-Study Program, or Federal Student Loans;
- California Community College Board of Governors (BOG) Fee Waiver;
- Institutional grants or scholarships offered at public and private colleges and universities;
- Other types of financial aid offered at your campus of attendance, such as private scholarships and student loans.

This is an initial Cal Grant eligibility notification only. You must still apply for admission to the campus you plan to attend. Your college makes the final eligibility determination for Cal Grant prior to disbursing your award. For questions about final eligibility determination and disbursement dates, check with the financial aid office at the campus you plan to attend.

PRIVACY STATEMENT: Cal Grant information for students who are 18 years of age or older, or who have attended a postsecondary institution, will only be released to parents or guardians with written authorization from the student.

*Lupita Cortez Alcalá*  
Executive Director

Once students have been awarded, they will receive a Cal Grant Eligibility Notification. This notification will let them know that they have met the preliminary criteria for a potential Cal Grant award and will provide them with Cal Grant maximum award amounts at each segment. It will also prompt them to create an account on WebGrants for Students.

## Stuff to Remember

- ▶ Upload GPAs now for your current seniors
- ▶ Upload GPAs for last year's grads. It really helps!
- ▶ Encourage students to complete their FAFSA or California Dream Act Application early

A few key points to remember:

- Upload GPAs now for your current seniors. Schools can upload GPAs for their upcoming seniors beginning in May of each year. The sooner you upload, the sooner they will know of their eligibility for a Cal Grant award.
- Upload GPAs for last year's grads as well! High school students have 2 opportunities to be considered for an Entitlement award – during their senior year and the year after they graduate. When submitting GPAs for last year's seniors, remember to include their senior year grades. For some students, their senior grades give them the needed GPA points to qualify for a Cal Grant Entitlement award!
- Encourage students to complete their FAFSA or California Dream Act Application early, beginning October 1<sup>st</sup> every year. Cash For College workshops are held every year throughout the state, providing assistance to students and parents in completing their FAFSA or California Dream Act Application. Visit [www.cash4college.csac.ca.gov](http://www.cash4college.csac.ca.gov) to find the nearest workshop or to register to become a Cash For College workshop host!

# Basic Eligibility Requirements

## Federal Requirements and Additional Cal Grant Requirements

\*U.S. Citizen, Eligible  
Non-Citizen

Not Earned a  
Bachelor's  
Degree

\*California Resident

Registered for  
Selective Service

Not Incarcerated

Not in Default on  
Title IV Student  
Loan

\*Social Security  
Number

Attend Cal Grant  
Eligible College

Enrolled at Least  
Half-Time

Maintain  
Satisfactory  
Academic Progress

GPA

Not owe a refund of  
any Title IV grant or  
state grant

\* Requirements are  
supplanted by other  
eligibility criteria for AB 540  
students

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To be awarded a Cal Grant, students must meet the basic eligibility requirements.

Note:

Different Cal Grant programs have different GPA requirements.

# Cal Grant Eligible Schools

The screenshot shows the homepage of the California Student Aid Commission (CSAC). At the top, there is a navigation bar with links for 'Web Grants', 'Cal Grants', 'Cash for College', 'Cal Dream Act', and 'FAFSA'. Below this is the CSAC logo and a search bar. A main navigation menu contains links for 'HOME', 'STUDENTS & PARENTS', 'HIGH SCHOOLS', 'COLLEGES', 'OUTREACH & PROGRAMS', 'REPORTS & PUBLICATIONS', 'NEWS ROOM', and 'ABOUT CSAC'. A large banner image shows a group of diverse students in graduation caps. At the bottom of the banner, there is a footer with links for 'Accessibility', 'List-Serv Subscription', 'Help', 'Contact Us', 'Site Map', 'Glossary', 'Cal Grant Eligible Schools', 'Important Links', 'ECMC', and 'Careers'. A purple arrow points from the 'www.csac.ca.gov' URL below to the 'Cal Grant Eligible Schools' link in the footer.

To be awarded and paid a Cal Grant award, students must attend a Cal Grant eligible college. It is a common misconception among students that the Cal Grant can be used at any college as long as it is located in the state of California. While it is true that all public colleges - California Community Colleges, CSUs and UCs - are eligible, not all private colleges meet our set of standards to participate.

Students who wish to be considered for the Cal Grant award should list a Cal Grant eligible college on their financial aid application. The list of eligible schools can be found on the Commission's website. Students can search by college name, by city, or by segment. In order for students to receive notice of their Cal Grant eligibility, the college must be on our eligible school list – so please remind your students.

# Cal Grant: Qualifying Factors



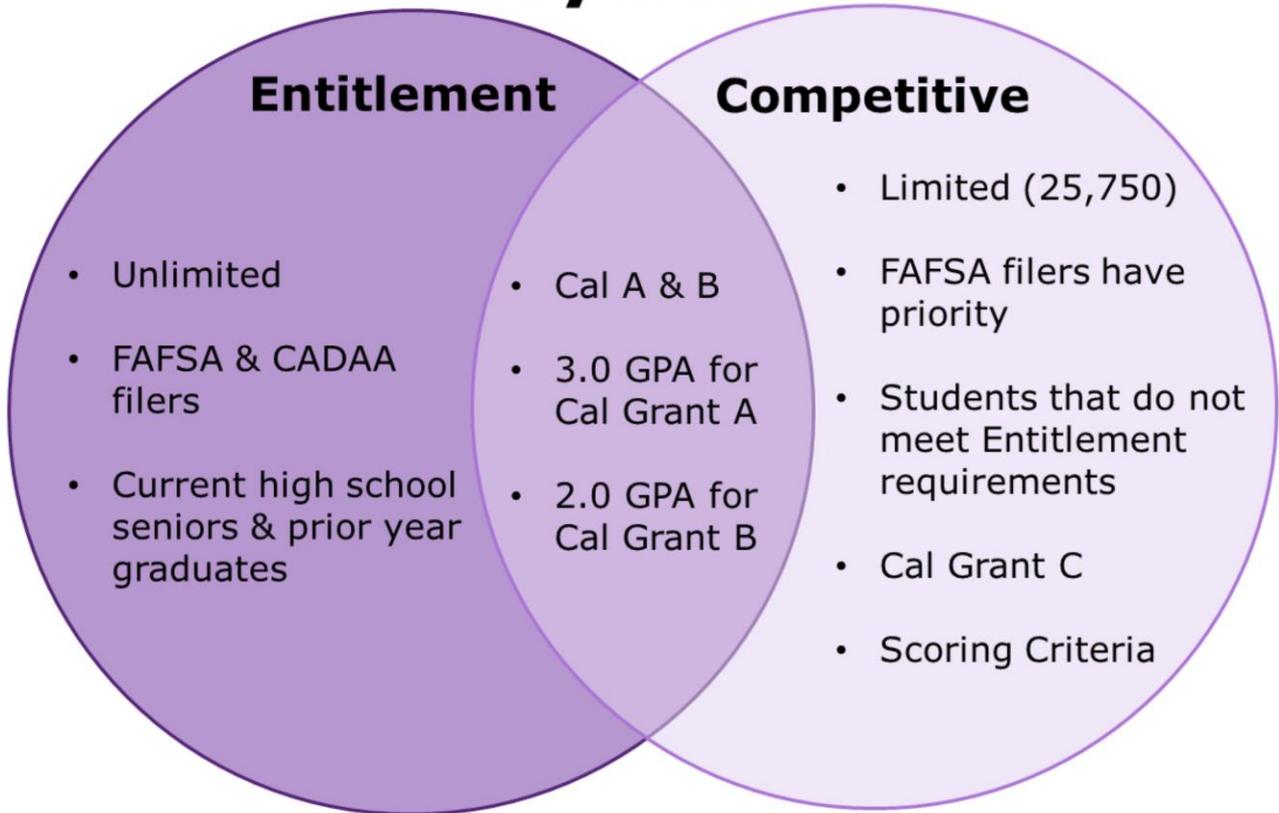
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There are three different types of Cal Grant awards - Cal Grant A, B, and C.

Each of these programs has different qualifying factors:

- Income and Assets
- GPA
- Program enrollment - Certificate or Degree
- Financial need

# Cycles



There are two categories of Cal Grants: Entitlement and Competitive. While the actual Cal Grant itself is the same (i.e. an Entitlement Cal Grant B is the same as a Competitive Cal Grant B), the student cohort being considered for the award is different.

Entitlement Cal Grant awards are reserved for current high school seniors and prior year graduates. Entitlement awards are guaranteed as long as the student meets basic eligibility criteria. The state does not put a limit on the number of Entitlement Cal Grants that can be awarded – essentially there are unlimited awards. Therefore, the easiest time to be awarded a Cal Grant is when your students graduate high school, or the year after that.

Students who transfer from a California Community College to a 4-year university and meet specific criteria, could also receive consideration for a Transfer Entitlement Cal Grant award.

Competitive Cal Grant awards on the other hand, are awarded based on a scoring matrix; and unlike Entitlement awards (which are unlimited), competitive awards are limited. Generally speaking, FAFSA filers who are not awarded a Cal Grant Entitlement award, may be considered for a Competitive award. Every year, nearly 300,000 students are considered for only 25,750 Competitive awards! As you can see, it is very difficult to get a competitive award.



- Minimum 3.0 GPA
- Higher income ceiling
- Minimum 2 year program
- Associate or Baccalaureate Degree
- Pays tuition & fees for up to 4 years at eligible schools in California

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For the 2017-18 year, a Cal Grant A pays:

- UC: \$12,630
- CSU: \$5,742
- Private, Non-Profit / Private, For-Profit (WASC Accredited): \$9,084
- Private, For-Profit (Non-WASC Accredited): \$4,000

Students who are awarded a Cal Grant A and are attending a California Community College, will have their award placed on Community College Reserve (CCR) until they transfer to a tuition and fee charging institution. This is because, technically, a Community College charges enrollment fees rather than tuition and fees.

Note: The grant is automatically kept on reserve for two years, and can be extended to three years if the student applies for and is granted an extension.

- Minimum 2.0 GPA
- Lower income ceiling
- Minimum 1 year program
- Certificate, Associate or Bachelor's Degree
- Pays tuition and fees in years 2, 3 & 4 at eligible schools in California
- Pays an access award for up to 4 years

## Cal Grant B



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For the 2017-18 year, a Cal Grant B pays:

- 1<sup>st</sup> year: \$1,672 access award
- 2<sup>nd</sup> – 4<sup>th</sup> year: \$1,672 access award + tuition and fees in the same amounts as Cal Grant A



- No GPA Requirement
- Minimum 4 month program length
- Associate Degree or Certificate program
- Up to \$1,094 at CCC (Books/Supplies)

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Students who are denied a Cal Grant A or B will be considered for a Cal Grant C. The Cal Grant C is for students who are pursuing an Associate Degree or Certificate at a vocational, occupational or technical school. So think of your students who want to go to school for cosmetology, automotive, or other vocational programs. Students being considered for a Cal Grant C will be ranked for eligibility based on certain criteria.

Cal Grant C awards are not set amounts and may vary by student and institution: The award provides up to \$1,094 for books, tools, and equipment – and an additional \$2,462 for tuition and fees if attending a school other than a California Community College. The award is available for up to two years.

Please see the reference section for more information on Cal Grant C.

# Which Cal Grant is the best?

- **All Cal Grants are beneficial!**
- Completing The FAFSA or the California Dream Act Application means you have applied for **A, B** and **C**
- Most beneficial award given based on the student's need
- Your application is **one stop shopping** for most financial aid, including federal, state and institutional aid from the school.

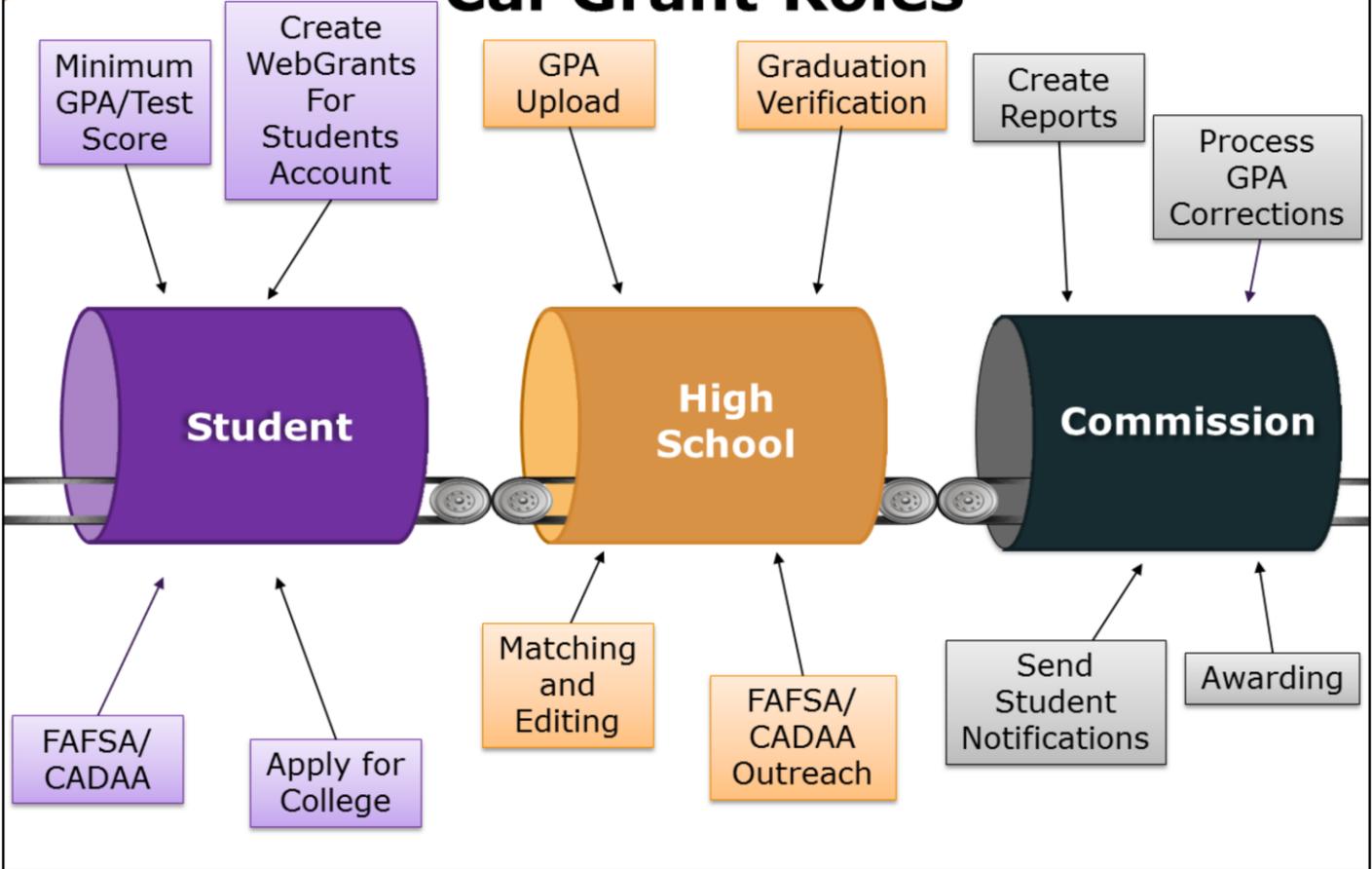


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When it comes to the 3 different types of Cal Grants students can receive, it's important to note that students can only receive one type of grant at any given time, A, B, or C. When a student applies for Cal Grant, they are not applying specifically for just the Cal Grant A or just the Cal Grant B, they are being considered for all three types of Cal Grants as well as the Middle Class Scholarship. In the event that the student meets the requirements for multiple grants, the grant deemed most beneficial is applied and the student is notified of the Cal Grant awarded.

Students that are not awarded a Cal Grant after graduating High School still have the opportunity to receive an entitlement award. If the student is at a Community College and transfers to a four year institution the student may be Cal Grant Transfer Entitlement eligible.

# Cal Grant Roles



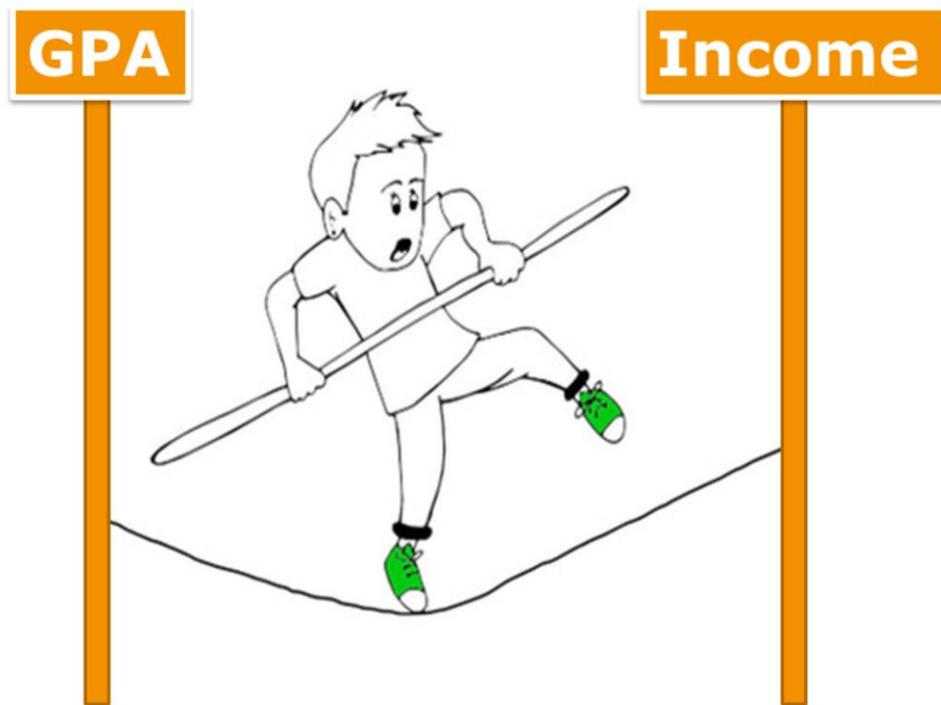
Students have the best chance of receiving a Cal Grant when everybody does their part. The combined efforts of the student, the high school and the California Student Aid Commission are what make it possible for students to be awarded a Cal Grant. That is why it is important for everyone to understand their responsibilities. As you can see here, just like an assembly line, everyone has a role to play.

Students need to meet the GPA requirements for Cal Grant. They need to complete and successfully submit either a FAFSA or a California Dream Act Application on time. They and their families have to decide what colleges to consider and to apply to each. Finally, students must create a WebGrants for Students account to access their award information, update their demographics and provide any additional required information. While high schools can assist with some of these things, ultimately it is up to the student to ensure they complete their part of the process.

High Schools also have their role to play, as we can see here. Aside from assisting and advising your students, high schools need to upload GPAs, verify High School Graduation and assist in the matching and editing process.

Once students and high schools have done their part, the California Student Aid Commission will process all of that information to match students in our system and then process them for consideration of a Cal Grant. When we all do our part, we are helping students to succeed.

# The “No Cal Grant Zone”



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Let us talk about something we are going to call the “No Cal Grant Zone.”

Both the student’s GPA and the family income and assets are used to determine Cal Grant eligibility. It is important for students to know how their GPA and family income are used in consideration for a Cal Grant and how they can be impacted by both. Remember that Cal Grant A and Cal Grant B have different GPA requirements and different income ceilings. We do not want students to get caught in the middle of these requirements, that is to say with family income too high for a Cal Grant B, but a GPA too low for a Cal Grant A. In that case, they would not be eligible for any Cal Grant because they would be in the “No Cal Grant Zone”.

# Scenario: "No Cal Grant Zone"



**Diana's GPA = 2.83**

**Family Size = 4**

**Family income = \$54,000**

## Does Diana qualify for a Cal Grant?

Let us pretend that Diana is currently a senior. As an example, we will say that her family size is four, her Cal Grant GPA is 2.83 and the total family income is \$54,000.

Is Diana eligible for a Cal Grant?

Let us take a look and see if she qualifies.

For Cal Grant B, the maximum income for a family of four is \$52,000 for 2018-19. Diana's family income is \$54,000.

In this case, Diana's family income is over the ceiling for Cal Grant B.

Under the income criteria for Cal Grant A, Diana's family income is well under the ceiling for a family of four.

But what about her GPA? The minimum GPA for Cal Grant A is 3.0

In this case, Diana's GPA of 2.83 is too low for Cal Grant A

Unfortunately, Diana does NOT qualify for a Cal Grant this year because her family income is just over the ceiling for B but her GPA is not high enough for A.

This exact scenario impacts many students each year. Please make your students aware early of the income and asset ceilings and the importance of their GPA. Do not let them get caught in the "No Cal Grant Zone."

\*\*Income and asset ceiling information is provided online: <http://www.csac.ca.gov/doc.asp?id=1122>

## *Stuff to Remember*

- ▶ Students need to understand the impact of their GPA on financial aid
- ▶ Share income and asset information early

Just a reminder—a student’s GPA is an important component of Cal Grant eligibility. Even though we use sophomore and junior grades to calculate GPAs, students should know from their freshman year that their GPA can be especially impactful if their family has a higher income.

# Cal Grant B Access Award

*To hold or not to hold?*



Year 1	Year 2	Year 3	Year 4
4 Years Remain	3 Years Remain	2 Years Remain	1 Year Remains
Community College Only Access		Four Year University Access + Tuition/Fees	



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Before we move on, let us talk about a common misconception. If a student receives a Cal Grant B they will get an access award, basically a stipend, of \$1,672 each year. They will receive this access award each year for a total of four years.

These students frequently start out at a community college with the idea of studying there for a couple of years before moving on to complete their studies at a 4-year university. They are often told that they should put their Cal Grant “on hold” while they are at the community college and save it for the 4-year school they will be attending later. Most of the time this is not good advice.

When a student is awarded any Cal Grant, the clock “starts ticking” in two different ways. Obviously, as the Cal Grant is paid out, the corresponding amount of eligibility is used. So when the first year is paid in full, that would leave three years worth of payments. The second way has to do with the student’s educational level. When a high school student graduates and starts college, they are considered to have an educational level of one, i.e. a freshmen, so they have four years of Cal Grant available.

In the example above, if a student attends a community college for two years and then transfers to a 4-year college, most of the time they are considered to have a education level of three. In other words, they are now a junior in college. Even if they never used a penny of their Cal Grant B access award because they put it on hold, they will still only have two years left of payments. That is over \$3,300 they could have received, but did not.

# California Student Aid Commission

**California  
Dream Act  
Application**



Let us talk about the other application we have here in California which can be used by eligible undocumented students, or Dreamers, to receive financial aid. The California Dream Act Application.

CA.GOV California Student Aid Commission

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## CALIFORNIA DREAM ACT Apply by March 2

The California Dream Act Application allows students enrolled in eligible California Colleges, Universities and Career Education Programs to apply for state financial aid. This application is unrelated to the federal Deferred Action for Childhood Arrivals (DACA) program.

[Check out our California Dream Act information & resources.](#)

**Announcements:**

- ⚠ To apply for a Cal Grant submit a California Dream Act Application by **March 2**.
- ⚠ Due to scheduled site maintenance, the on-line California Dream Act Application will be unavailable every Wednesday and Sunday from 11:30 p.m. to 2:30 a.m. (PST). We apologize for any inconvenience this may cause.

**✔ New to The California Dream Act?**  
Select this option if you:

- \* Have never filed a CA Dream Act Application
- \* Want to start a new CA Dream Act Application
- \* Are ready to get started

**Start A New Application**

**✔ Provide a Parent Signature**  
Select this option if you:

- \* Need to request Parent PIN
- \* Forgot your Parent PIN
- \* Need to sign your Student's application

**Sign Student Application**

**✔ Returning User?**  
Select this option if you want to:

- \* Continue or renew your CA Dream Act Application
- \* Update or correct current CA Dream Act Application
- \* View your Student Aid Report (SAR) and more...

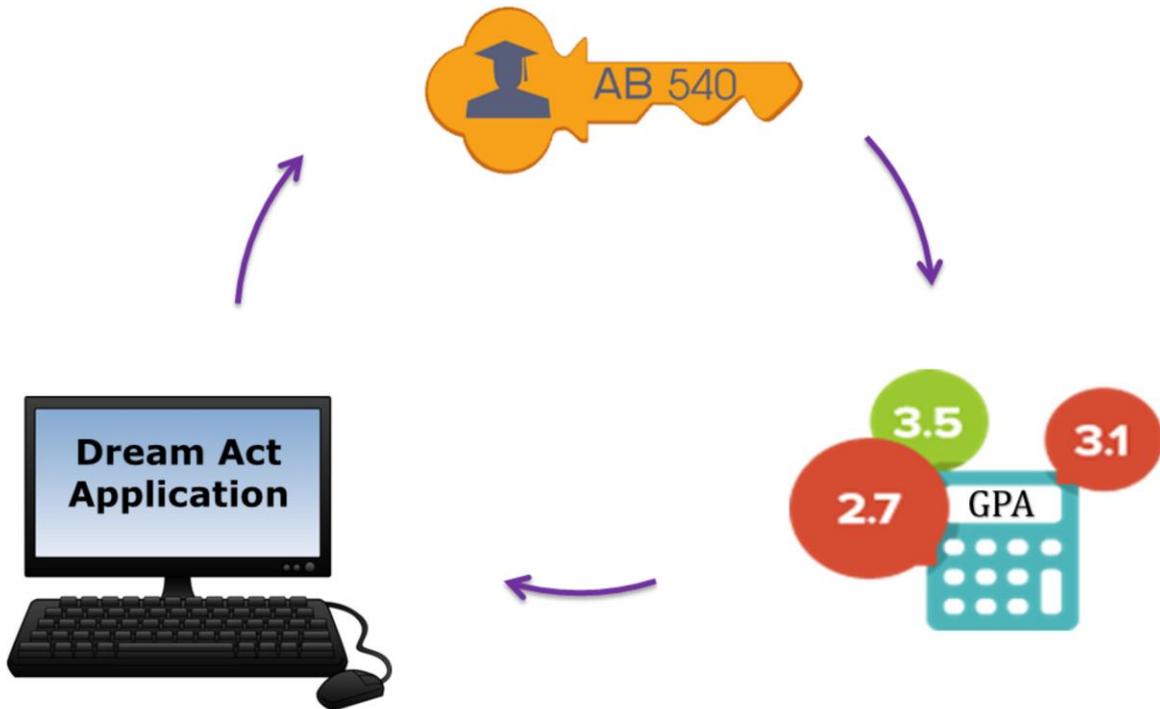
**Login**

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This is the California Dream Act Application homepage. Students can find this at [www.caldreamact.org](http://www.caldreamact.org) or from a link on the Commission home page at [www.csac.ca.gov](http://www.csac.ca.gov). At the bottom of this page there are 3 sections. By clicking on the corresponding section, students can either start a first time California Dream Act Application, provide a parent signature or log-in to a previous application to make an update or correction. To start a new, first time application, students will click on the first green button to the left.

There is other useful information on this page such as a link to a Resource Page.

# Applying for a Cal Grant



First, Dreamers need to make sure that they meet the AB 540 requirements. Students need to meet the AB 540 criteria in order to qualify for Cal Grant. After ensuring that they meet the criteria, the GPA and the Dream Act application need to be completed.

Undocumented students and those with DACA should fill out the Dream App, not the FAFSA. The CA Dream Act application becomes available October 1<sup>st</sup> each year. Students should complete their Dream Act application by March 2<sup>nd</sup>.

Lastly, the California Student Aid Commission (CSAC) needs to receive a GPA . Public and charter schools need to submit GPAs for their seniors by October 1<sup>st</sup>. All other schools will have until March 2<sup>nd</sup> to submit GPAs.

To recap, in order for Dreamers to be considered for a Cal Grant, they must:

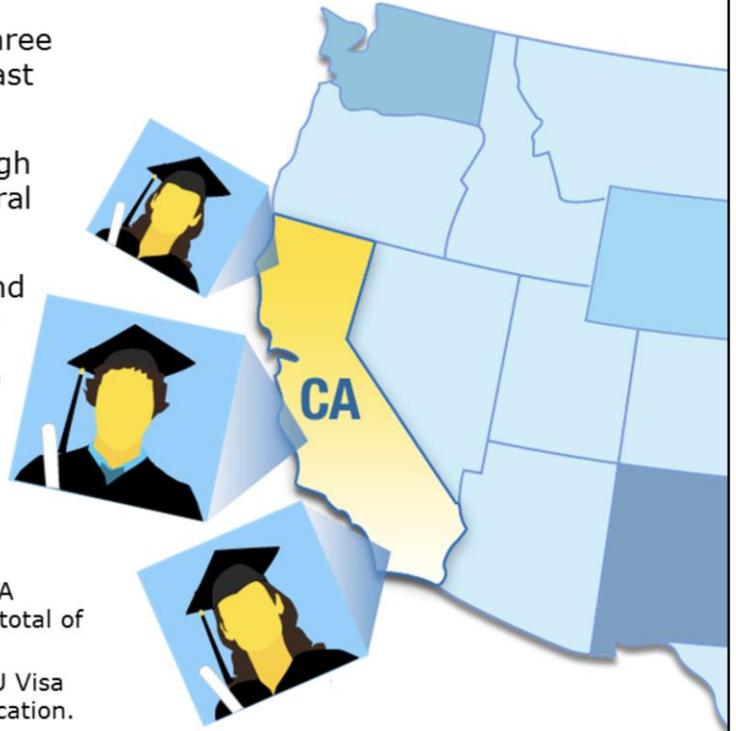
- Meet AB 540 eligibility
- Submit a CA Dream Act application by March 2<sup>nd</sup>
- Have their GPA submitted to CSAC by March 2<sup>nd</sup>

# AB 540 Requirements

- ✓ Attended a CA high school for at least three years or attained the equivalent of at least three years of credits\*, **AND**
- ✓ Graduated or will graduate from a CA high school or passed the Certificate of General Education Development (GED), **AND**
- ✓ Will register or enroll in an accredited and qualifying CA college or university, **AND**
- ✓ If applicable, complete(d) an affidavit to legalize immigration status as soon as you are eligible, **AND**
- ✓ Do not hold a valid non-immigrant visa (F, J, H, L, A, B, C, D, E, etc.)\*\*

\*Under this provision, you must also have attended CA schools (elementary and secondary) for a cumulative total of three or more years.

\*\*If you have Temporary Protective Status or hold a U Visa may still be eligible for the California Dream Act Application.



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Here is the AB 540 eligibility criteria for undocumented students. Always assume that as a High School Counselor you have undocumented students (Dreamers) as a part of your student population. Many of these students will meet AB 540 requirements, meaning they can complete a California Dream Act Application and be given consideration for a Cal Grant and other state financial aid.

Students can find the AB 540 Affidavit on our [caldreamact.org](http://caldreamact.org) website if they are curious about it, but they should be aware that this is handled by the college not the Commission.

Under the California Dream Act, most visa holders are not eligible for state aid and would not fill out the California Dream Act Application. The one visa exception is the U visa, because U visa holders are in the country assisting law enforcement. The other group of students that are eligible to fill out the California Dream Act Application are those with Temporary Protective Status. If these students meet the provisions of AB 540, they would complete a paper California Dream Act Application and they are exempt from filling out the affidavit.

# DACA To Be Phased-Out

- No new applications as of 9/5/17
- Current DACA holders can maintain their status until it expires
- Renewals only accepted if expiring on or before 03/05/2018
- Renewal applications only accepted through 10/05/2017
- No new advance parole applications accepted

**Unless new legislation is passed, DACA will be completely phased out in 2 ½ years**

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The Trump administration announced that it would begin phasing out the Deferred Action for Childhood Arrivals, or DACA.

DACA, which was introduced by former President Barack Obama through executive action five years ago (2012), offered certain young undocumented immigrants, typically brought to the United States as children, work permits and a two-year renewable reprieve from deportation.

No new applications are being accepted by USCIS (United States Customs and Immigration Services) as of 9/5/17.

Those who have a current DACA status can maintain all their rights under DACA until it expires. This includes the right to work and continued protection against deportation.

Individuals whose DACA will expire on or before 03/05/2018, can apply for renewal of their DACA status as long as their renewal application is received by USCIS by 10/05/2017. Renewing their DACA will provide them with 2 more years of DACA status.

Advance Parole, which granted non-immigrants the ability to reenter the US after

traveling abroad, will no longer accept applications. Some advocacy groups and immigration attorneys are recommending that DACA holders not travel outside of the country at this time.

# Impact on State Aid

Regardless of what ultimately happens with DACA

- **DACA is not required for AB 540 eligibility**
- **DACA is not required to complete CADAA**
- **DACA will not impact the ability for students to continue receiving financial aid**

Continue to encourage your  
students to apply for aid!

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# California DreamAct



**Only a handful of states offer state financial assistance to Dreamers**

**California is one of the few states that has its own application specifically for Dreamers.**

Currently about 20 states offer some type of in-state tuition program to undocumented students, but only a handful of states, including California, offer state financial assistance to attend college.\* California is also one of the only states which developed and implemented its own application for eligible undocumented students, the California Dream Act Application.

Eligible students who complete and successfully submit the California Dream Act Application are eligible for a wide range of aid, including Cal Grants, Middle Class Scholarship, Chafee Grant, Institutional Aid, the Board of Governors fee waiver, Dreamer loans at UCs and CSUs as well as other aid and scholarships.

\* National Conference of State Legislatures <http://www.ncsl.org/research/immigration/tuition-benefits-for-immigrants.aspx>

# Dreamers: Reporting Income & Assets



Students may need to provide income verification or copies of tax returns to their financial aid office.

Applying for aid as a Dreamer does **NOT** impact immigration status!

You can help your students to successfully complete the California Dream Act Application by assisting them with the income and asset section of the application. All dependent applicants for financial aid will need to report their families' income and assets. Also, as income earners, your Dream Applicants' families are expected to file taxes if they meet the IRS minimum earning threshold. If an applicant indicates a family income over the filing threshold, but also indicates the family will not pay taxes, their application will be flagged. Dream Applicants and their families frequently file taxes with an ITIN number, which is an individual tax identification number. Students should know that they could be selected for verification and that their college may ask for copies of their taxes or other proof of income. If you are not sure what the minimum filing threshold is, you can find it on the IRS website.

# 2018-19 California Dream Act Application Changes



## Removing Questions:

- **(8.) SSN/ITIN (8a.) DACA SSN**

If you entered a SSN in question 8, was it issued after you went through the Deferred Action or Childhood Arrivals (DACA) process?

- **(23a.) Selective Service**

Most males between 18 and 25, including undocumented males, must register with the U.S. Selective Service System to be eligible to receive state financial aid. If you are male, age 18 to 25, or will turn 18 before July 1, 2017, fill in this box if you would like us to register you.

- **(31.) Student Loans**

If your campus offers a student loan program, would you be interested in a student loan?

Indicating "Yes" does not obligate you to accept a loan, if offered.

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For the 2018-19 academic year, there will be some changes to the California Dream Act Application. With some of the uncertainty surrounding undocumented students, the Commission has pledged to protect the data of that student population. As part of that process, we will be removing these three questions from the California Dream Act Application.

Students will no longer be able to enter their DACA SSN on the application. This was always optional, but now it will simply not be available. Remember that eligible AB 540 students do not need DACA to successfully complete and submit the California Dream Act Application.

Another section that has been removed is the Selective Service registration tool. Previously, male students between the ages of 18 and 25 had the option of registering for Selective Service via the California Dream Act Application. This will no longer be the case. Male AB 540 students in that age range will now have to register via mail as registering for Selective Service is still a requirement for financial aid.

Finally, students will no longer have the ability to indicate their interest in the Dreamer Loan program. This program offers loans of up to \$4,000 per year to undocumented students at UCs and CSUs who have financial need and meet the eligibility criteria. The Dreamer Loan program will continue to serve students, but they will need to inquire directly with their financial aid office.

# California Dream Act Application Correction

My student completed the FAFSA instead of the California Dream Act Application, **what do I do?**



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A typical problem that arises each year is that a California Dream Act applicant completes a FAFSA with their DACA SSN. When that happens, what should you do? First, make sure the student completes the California Dream Act Application for the correct academic year. Next, contact the Commission immediately. You will need to complete an Application Conversion Form, called a G-55. You will need both the students' DACA SSN and their Dream Act I.D. numbers ready. The Commission will complete a FAFSA-to-Dream-Act conversion. This process converts their information and award to the correct financial aid application.

# Top Reasons Not Awarded

- Application not submitted on time or not fully completed before March 2<sup>nd</sup> deadline
- Missing parent signature
- Missing, incomplete or inaccurate income and/or asset information
- Selective Service not completed or school not able to verify (male students 18-25)
- Verification process not completed in time to start school
- Student completes FAFSA erroneously
- Confusion at college level (financial aid vs. admissions) about Dream Act eligibility



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## Stuff to Remember

- ▶ You do not need DACA to complete a California Dream Act Application
- ▶ DACA and the California Dream Act Application are two different things

For additional resources, including greatly expanded information for our Dreamers students in California, please visit the electronic version of our resource section by going to:

[http://www.csac.ca.gov/training/2017\\_california\\_high\\_school\\_counselors\\_workshop\\_guide.pdf](http://www.csac.ca.gov/training/2017_california_high_school_counselors_workshop_guide.pdf)

# California Student Aid Commission

## High School Responsibilities



# Establish WebGrants Access



## Complete and submit:

- WebGrants System Administrator's Access Request Form
- FAFSA/CA Dream Act Completion Program Agreement

\*Can be emailed to [SchoolSupport@csac.ca.gov](mailto:SchoolSupport@csac.ca.gov)

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You can gain access to the Commission's WebGrants system by completing two forms: the High School System Administrator Access Request form and the FAFSA/CA Dream Act Completion Program Agreement. Once you have access, you can submit GPAs.

These forms are available on the Commission's website and must be submitted before access can be gained by your school. It is critical that you fill out your WebGrants application forms and mail them in a timely manner so that the Commission has time to process the forms and you have time to check your access prior to uploading your students' GPAs.

Remember – even if you are not the person involved in the GPA upload process, you should still have access to WebGrants for your school in order to check reports, see which students have been awarded a Cal Grant and assist in the matching process if needed.

# Getting Started: Uploading GPAs

1. Check out our training materials offered on our website
2. Download the Non-SSN Upload User Guide
3. Download the Non-SSN GPA Excel Template
4. Upload the text file you have created



If you will be uploading GPAs for the first time, here are the first steps you should take. We will not go over all this information in great detail, but please remember we do have training materials on our website, offer live and pre-recorded webinars and we are available by phone or e-mail to assist you.

Here is what you need to do to get started.

First – check out our training materials offered on our website. Watch the short, pre-recorded GPA upload information mini-trainings or register for a live webinar that covers the NON-SSN upload process.

Next - Download the Non-SSN Upload User Guide.

Then - Download the Non-SSN GPA Excel Template.

Finally – Upload the text file you created.

# Review WebGrants GPA Reports

Non-SSN GPA School Upload Report	Upload Confirmation	Data File
Non-SSN GPA Status Report	Provides Student Status after the Non-SSN GPA is received	Report and Data File
Non-SSN GPA School Unmatched Report	List of Non-SSN GPA records that have not matched to a financial aid application.	Report
Student Summary Report	Displays student statuses of those with matched Non-SSN GPA and GPAs submitted with SSN	Report and Data File
Financial Application (No GPA)	Lists students that have submitted a financial aid application but no GPA	Report
Your Cal Grant Awardees	Lists students that have been offered a Cal Grant Award	Report

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The report layout has page numbers, titles to columns and is made for easy reading and printing. The data file layout is intended for importing into Excel for filtering and sorting.

**Non-SSN GPA School Upload Report:** This report is an upload confirmation report that is produced each time there is an upload. This report is available the morning after GPAs have been uploaded.

**Non-SSN GPA Status Report:** This report indicates student financial aid application statuses. Like most of the other reports, it is available the morning after GPAs are uploaded and is updated daily.

**Non-SSN GPA School Unmatched Report:** This is a report that identifies students that are not matching, which means the NON-SSN GPA data provided by the school is not matching with a FAFSA or California Dream Act Application submitted by the student.

**Student Summary Report:** This report includes both students that had an SSN GPA submitted and students whose Non-SSN GPA has matched to their application. This is the most all-inclusive report offered.

**Financial Application (No GPA) Report:** This report displays those students who have listed your high school on their submitted FAFSA or CADAA but for whom the Commission has not received a GPA. Use this report to confirm that all student GPAs have been submitted by your school.

**Your Cal Grant Awardees Report:** This report lists all students who have recently been offered a Cal Grant award.

# Non-SSN Matching Process

If a student completes their FAFSA or California Dream Act Application and it varies from the information submitted with their GPA  
**the student may NOT match.**

## Match NON-SSN GPA to Financial Application

- Used to match a NON-SSN GPA record to a Financial Application
- Date of Birth and partial first OR last name is required to do search
- Partial first name with MINIMUM 3 characters
- Partial last name with MINIMUM 2 characters
- Students highlighted in **GREEN** have already been matched
- Students highlighted in **GOLD** have been placed on HOLD status. Please contact CSAC
- Once a match is selected, click the "Submit Changes" button to finalize the match

Academic Year: 2018-2019 Last Name: DO First Name: JON GO

DOB (mm/dd/yyyy): 9/12/1996 Student City: School City:

School ID: 99999900

Record(s): 1 NON-SSN to Financial Application Page: 1 of 1

Name	DOB	Address	School	Std Phone	Par Phone	Std Email	Par Email
DOE, JONATHAN I	09/12/1996	5331 WATER VIEW, SACRAMENTO 90058	99999900	(552) 456-2365	(555) 636-3987		

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If a student completes their FAFSA or California Dream Act Application and it varies from the information submitted with their GPA, the student may not match.

Matching occurs in our WebGrants system and is the high school's responsibility to go into the system and match the student to their financial aid application. One misconception we frequently get at the Commission is that matching needs to occur before March 2<sup>nd</sup>. Matching can occur well after the March 2<sup>nd</sup> deadline, so do not stress. The student will eventually get matched.

**Scenario:** A high school submitted a GPA with an incorrect date-of-birth.

There are two ways to correct the error and match the student:

- 1) Match NON-SSN GPA to Financial Application- Manually match the GPA to the financial aid application.
- 2) Edit NON-SSN GPA Record- Correct the DOB on the record. The system will match the record automatically overnight.

This slide shows an example of how to match the GPA manually. Search the student by the correct academic year, DOB, School ID, Last Name, and First Name. Select Go. The student's record will populate at the bottom of the screen. Click on the record.

# Non-SSN Matching Process

## Step 3: Verify and match student records.

Academic Year: 2018 - 2019 Last Name: DO First Name: JON Request Fin Apps

DOB (mm/dd/yyyy): 06/20/2000 Student City: School ID: 99999900 School City:

	Non-SSN GPA Data SSN or Dream App ID	Financial Application Data	Financial Appl
Last Name	DOE	DOE	
First Name	JONATHAN	JONATHAN	
Middle Init	I		
DOB	09/12/1996	12/9/1996	
Address	5331 WATER VIEW	11040 WHITE ROCK ROAD	
City	SACRAMENTO	RANCHO CORDOVA	
Zip	90058	90058	
School Code	99999900		
Student Phone	(552) 456-2365		
Parent Phone	(555) 636-3987		
Student Email		TEST@CSAC.CA.GOV	
Parent Email		TEST@CSAC. ...	
GPA	3.08		
State Student ID	2054319935		

Submit Changes Back

Listed here is the Data provided by Student's FAFSA/California Dream Act Application Submission

Listed here is the Data provided by HS's GPA Submission

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After selecting the record, you will be brought to this screen where you will see the Non-SSN GPA Record submitted by the High School.

To the right of the GPA record are possible financial aid applications that could be your student's. It is possible to have more than one record come up here.

Jonathan Doe's GPA did not match because, as you see, not only was the date of birth information transposed, the addresses listed are not the same. If you are confident it is the same student, you can match the GPA to the financial aid application by clicking in the match radio button to 'Submit Changes' and marry the two records together.

# Non-SSN Matching Process

**Record is matched!**

Academic Year: 2018-2019 Last Name: DO First Name: JON  
DOB (mm/dd/yyyy): 9/12/1996 Student City: School City:  
School ID: 99999900

Database Update results  
Matched: 1  
Match Errors: 0

Record(s): 1 NON-SSN to Financial Application Page: 1 of 1

Name	DOB	Address	School	Std Phone	Par Phone	Std Email	Par Email
DOE, JONATHAN I	09/12/1996	5331 WATER VIEW, SACRAMENTO 90058	99999900	(552) 456-2365	(555) 636-3987		

Back

Green = Matched  
This student is MATCHED!

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You will be brought back to the initial matching screen and you will notice that the student is now displayed in green, meaning that the Non-SSN GPA record is now matched. This student will now be processed in the next Cal Grant award selection, which is held each weekend.

# Editing

- Students that are highlighted in **Green** are matched and cannot be edited.

Edit NON-SSN GPA Record

- Used to edit non-matched NON-SSN GPA Records
- Students highlighted in GREEN have been matched and can't be updated
- Enter as much information to narrow your search
- Click Submit Changes to update record changes

Academic Year: 2018 - 2019 ▾

Last Name:

First Name:  GO

DOB (mm/dd/yyyy):

Student City:

School ID:

SSID:

Batch #:

Record(s): 657
Select a NON-SSN record to Edit
Page: 1 of 33

<input type="checkbox"/>	Batch ID	Seq #	GPA	Name	DOB	Address	School	Stdt Phone
<input type="checkbox"/>	49700	1	2.8	DOE, JANE	12/20/2000	12345 SHADOW COURT, SACRAMENTO, 95828	05000000	
<input type="checkbox"/>	49700	2	3.8	DOE, JOHN	08/26/2000	6789 SHADY LANE, SACRAMENTO, 95829	05000000	

This slide shows how to correct the DOB on the Record.

To edit un-matched GPAs, use the Edit NON-SSN GPA Record Screen. Students who are highlighted in green have already been matched and their records cannot be updated here. To make changes to matched records, please contact the Commission.

On the Edit NON-SSN GPA Record screen, select the record that you want to update.

# Editing

Student Information Section		
Student's Name *(Last, First, Middle Initial)		
DOE	JANE	
Date of Birth *(MMDDYYYY)	Gender *(M or F)	Graduation Date *(MMYYYY)
12202000	F	052018
Student Email		
JANEDOE@GMAIL.COM		
Student's Address *	City *	Zip Code *
12345 SHADOW COURT	SACRAMENTO	95828
Student Phone		
Parent Information Section		
Father's Last Name	Mother's Last Name	
Parent's Phone	Parent's Email	
Other Information Section		
State Student ID *	School Code *(School Submitting GPA)	
0000000000	05000000	
CSAC ID	School Student ID	GPA *(001-400)
		280

This will open the Student Information Section screen. You may make your changes here.

# HS Graduation Verification

Complete by August 31

Name	Date of Birth	Graduation Status
APPLESEED JOHN A	02/07/1996	<input checked="" type="radio"/> Graduated <input type="radio"/> Not Graduated <input type="radio"/> Pending
BROWN BLEU	07/26/1996	<input checked="" type="radio"/> Graduated <input type="radio"/> Not Graduated <input type="radio"/> Pending
DOE JANE	11/14/1995	<input checked="" type="radio"/> Graduated <input type="radio"/> Not Graduated <input type="radio"/> Pending
TEST STUDENT	04/29/1996	<input checked="" type="radio"/> Graduated <input type="radio"/> Not Graduated <input type="radio"/> Pending

Verify Students

*You can **only** verify High School Graduation after the student is awarded a Cal Grant.*

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After the student is awarded a Cal Grant, the High School WebGrants administrator needs to verify High School graduation no later than August 31 of the academic year following graduation.

The High School Graduation Verification screen is accessed from the GPA Menu in WebGrants. This screen is made available the month students graduate and it only lists your Cal Grant awardees. For example, if your students graduate in the middle of June then the screen is made available early June.

You can assist your students in verifying their graduation status by selecting from the following options:

\* You will select **GRADUATED** for students who graduated receiving a diploma.

\* If you are certain a student will not graduate, you will select NOT GRADUATED. This withdraws their award.

The Pending option should be marked for students who are still working on meeting HS graduation requirements. For example, they may be attending night classes, summer school or even attending an adult school program. After the student graduates, the school official must come back to this screen in WebGrants to release the award. The verification of graduation still needs to be completed or the student will be withdrawn. If the 'Not graduated' status was reported in error, the student can appeal to the Commission by providing their HS transcripts or Diploma reflecting their HS graduation date.

## Stuff to Remember

- ▶ GPA matching and editing can occur after the March 2<sup>nd</sup> deadline
- ▶ High schools cannot edit records that are matched
- ▶ Verify high school graduation by August 31<sup>st</sup>

Here are some key points for this section:

- 1) Although March 2<sup>nd</sup> is the Cal Grant deadline, GPA matching and editing can still occur after March 2<sup>nd</sup>
- 2) Students who are already matched will be highlighted in green on the edit screen. These student records cannot be edited by the high school. Please contact the Commission if you have corrections to make at this point.
- 3) Verify high school graduation starting the first week of the month of graduation but no later than August 31<sup>st</sup>

# California Student Aid Commission

**Helpful Hints**



# Avoid Upload Issues



Although the Commission provides many resources to assist you with your upload, if you are not familiar with the process you may experience issues along the way.

We have identified common upload issues that you can refer to at the back of your workbook. Lets review the top three upload issues.

# Common Upload Issues

Missing zeros at the end of College Board school code in **School Code** field

Example: 051234  
Correction: 05123400

School Code
051234
051234
051234
051234
051234
051234
051234
051234
051234
051234



School Code
05123400
05123400
05123400
05123400
05123400
05123400
05123400
05123400
05123400
05123400



Each high school is assigned a 6 digit college board code. The Commission uses this code to identify high schools in our WebGrants system.

When your high school is programmed into WebGrants, two additional zeros are placed at the end of your college board code. This means that whenever you communicate with the commission you will use your 8 digit code.

Oftentimes, high schools forget to add the 2 zeros at the end and this results in an upload error.

It is important to key in the appropriate 8 digit code when filling out the Excel Template.

# Common Upload Issues

Decimal in the **GPA** field

Example: 3.50  
 Correction: 350

GPA	GPA
3.65	365
2.35	235
4.00	400
3.75	375
3.06	306
3.89	389
4.00	400
2.00	200



Another common error is using a decimal in the GPA. WebGrants will reject GPA data containing decimals.

Correct GPAs will consist of 3 digits from 001 to 400.

# Common Upload Issues

Data in protected fields (**Column E and V**) of the Non-SSN GPA Template

Example: Paste data *over* column  
 Correction: Leave Blank  
 Paste data *around* column

GPA	Leave Blank	Spring School Code
365		05123400
235		05123400
400		05123400
265		05123400
178		05123400

GPA	Leave Blank	Spring School Code
365		05123400
235		05123400
400		05123400
265		05123400
178		05123400

Our Non-SSN GPA template is programmed with hidden information. This information is contained in columns E and V and are grayed out. The titles of these columns are "Leave Blank." Do not type anything in these columns.

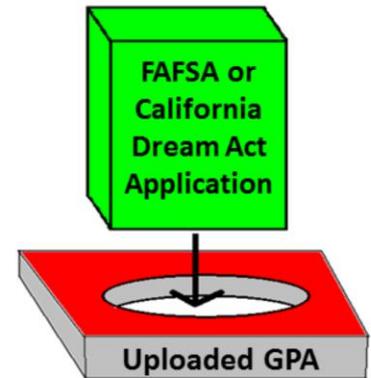
When inputting data, be sure that you are not pasting blank cells over the grayed out columns. This will cause an upload error.

Instead paste data around the grayed out columns. When you have completed your spreadsheet, you should still see the grayed out columns.

# Common Awarding Issues

After the deadline for Applications and GPA uploads has passed

- Student's First Name is different
- Student's Last Name is different
- Date of Birth is incorrect
- Address different on Application
- No ISIR Data Found
- FAFSA not fully completed
- Dream Act Application not completed
- Parent paper signature page
- Student completed previous year FAFSA
- Student completed last year's Dream Act
- Twins or siblings mismatching
- GPA matches to someone else
- FAFSA completed with DACA SSN
- Student completes both FAFSA & CADAA



For a variety of reasons, sometimes even after a GPA is uploaded and the student completes a FAFSA or California Dream Act Application something may happen that blocks the matching process. This can then prevent the student from matching correctly in the system and being awarded a Cal Grant. You may find that you are unable to correct these issues with the matching tools available to you in WebGrants.

Here are the most common issues.

## What if...

- The student's name on the GPA record does not match their FAFSA/CADAA? → Edit the GPA record using the *Edit Non-SSN GPA* screen in WebGrants.
- The student completed a previous year FAFSA/CADAA? → Have the student complete the correct year application and submit an *Appeal Form (G-18)* to the Commission.
- Student completed both a FAFSA and CADAA? → Have the student complete the correct application and then submit an *Application Correction Form (G-55)* to the Commission.

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Here are a few of the common issues we see, and the action that should be taken to correct them.

# What if...?

**Contact Institutional Support at: [schoolsupport@csac.ca.gov](mailto:schoolsupport@csac.ca.gov) when...**

- There is a “No ISIR Data Found” message when trying to match
- The student’s GPA matched to a sibling or someone else
- A California Dream Act applicant’s GPA was submitted with DACA issued SSN
- The student was processed with a community college GPA
- Student used a DACA issued SSN to complete a FAFSA
- Even after a GPA is uploaded and an application submitted on time, there is no information in the system about the student

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Sometimes there are issues which go above and beyond simple matching problems. Here are some examples of other things which may occur.

When there is a “No ISIR Data Found” message when you are trying to match the student. This normally indicates that the FAFSA or California Dream Act Application was not successfully submitted.

The student’s GPA matched to a sibling or someone else. This happens often with twins.

A California Dream Act applicant’s GPA was submitted with DACA issued SSN. This can happen when

The student was processed with a community college GPA.

Student used a DACA issued SSN to complete a FAFSA.

Even after a GPA was uploaded and an application submitted on time, there is no information in the system about the student.

Please contact Institutional Support so that we can assist you with any of these.

# GPA Upload Corrections

- Password protected email
- List *incorrect* information and *correct* information
- List your contact information in case we need clarification



**Email: [schoolsupport@csac.ca.gov](mailto:schoolsupport@csac.ca.gov)**

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We know how hard schools work to upload correct information, but sometimes errors occur. Let us say incorrect information was submitted to the Commission. In order to make a correction, you could edit the information in WebGrants if the Non-SSN method was used and the GPA was not matched.

After the March 2<sup>nd</sup> deadline, if the incorrect GPA was submitted, you would send an encrypted email on school letterhead requesting the correction including all of the student's information and clearly stating what was incorrect and what is correct. Also be sure to add your contact information, just in case we have questions or need clarification.

California  
Student Aid Commission

**WebGrants  
for Students**



I completed and  
successfully  
submitted my FAFSA  
and my high school  
uploaded my GPA.



Diana completed and successfully submitted her FAFSA, and her high school uploaded her GPA. What is next?

# WEBGRANTS4STUDENTS.ORG



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Students need to create an account at WebGrants for Students. The web address is [www.WebGrants4students.org](http://www.WebGrants4students.org).

When creating their account, they need to make sure to use the exact spelling of their name as provided on their FAFSA or California Dream Act Application. For example, if the student used a hyphenated last name on their application, he/she needs to make sure to include the same hyphenated last name when creating his/her Webgrants for students account.

Also, mobile devices like smartphones and tablets are not compatible, so they should use a laptop or desk top computer to avoid incompatibility issues. It is important to note that we recommend students use a current version of Internet Explorer, Mozilla Firefox, or Safari web browser when using this website.

# Confirming School of Attendance



WEBGRANTS 4 STUDENTS

Cal Grant

Chafee Grant

Home Tools Links Help Sign Out

Middle Class Scholarship

Cal Grant Main Change My Address View My Application Status View My Award Detail View My CA Aid Report (CAR) View My Payment History Submit School Change Third Party Access to My Account Submit School Leave of Absence

## Cal Grant Main Menu

 Required items are marked below. You must complete all requirements in order to receive your award.

### ACTION ITEMS:

 [Confirmation of School of Attendance](#) Required to complete awarding process.

 [Submit High School Graduation Confirmation](#) Required to receive payment.

### RESOURCES:

- [Understanding My Cal Grant](#)
- [Disqualification Fact Sheet](#)
- [Change My Address](#)
- [View My Application Status](#)
- [View My Award Detail](#)
- [View My CA Aid Report \(CAR\)](#)
- [View My Payment History](#)
- [Submit School Change](#)
- [Third Party Access to My Account](#)
- [Submit School Leave of Absence](#)

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The Cal Grant link will take them to the Cal Grant Main Menu. If there is a stop sign, that means the student must complete the requirements listed. Students may be presented with up to two requirements: Confirmation of School of Attendance and/or Submit High School Graduation Confirmation. These requirements must be completed in order to claim the Cal Grant award.

Let us take a look at the first requirement: Confirmation of School of Attendance.

# Confirming School of Attendance

CALIFORNIA STUDENT AID COMMISSION

WEBGRANTS 4 STUDENTS

Cal Grant Chafee Grant Home Tools Links Help Sign Out Middle Class Scholarship

Cal Grant Main Change My Address View My Application Status View My Award Detail View My CA Aid Report (CAR) View My Payment History Submit School Change Third Party Access to My Account Submit School Leave of Absence

### Confirmation of your School of Attendance

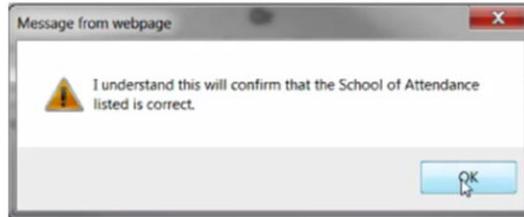
Please confirm the school you are attending below. If the school listed is not the one you will be attending, select the School Change link and you will be redirected to the screen that will enable you to complete the required school change.

I will be attending the following School of Attendance: **UNIV OF CA - DAVIS**

OR

Make a school change on this screen [Submit School Change](#)

**Student Certification:** By selecting the check box and clicking the **Submit** button below, I am affirming that I will be attending the school listed above. I understand that it is illegal to report false or misleading information. I have read the information printed above and certify under penalty of perjury under the laws of the state of California, that the information above is true and correct.



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After clicking the Confirmation of School of Attendance link, the student is presented with two options. If the school listed will be the school of attendance, the student can simply make this confirmation right then and there. Once students have completed this requirement, they will receive a notification that their school of attendance has been confirmed.

# School Change

CALIFORNIA STUDENT AID COMMISSION

WEBGRANTS 4 STUDENTS

Home Tools Links Help Sign Out  
Cal Grant Chafee Grant Middle Class Scholarship

Cal Grant Main Change My Address View My Application Status View My Award Detail View My CA Aid Report (CAR) View My Payment History **Submit School Change** Third Party Access to My Account Submit School Leave of Absence

### Confirmation of your School of Attendance

Please confirm the school you are attending below. If the school listed is not the one you will be attending, select the School Change link and you will be redirected to the screen that will enable you to complete the required school change.

I will be attending the following School of Attendance: **UNIV OF CA - DAVIS**

Or

**Make a school change on this screen** [Submit School Change](#)

**Student Certification:** By selecting the check box and clicking the **Submit** button below, I am affirming that I will be attending the school listed above. I understand that it is illegal to report false or misleading information. I have read the information printed above and certify under penalty of perjury under the laws of the state of California, that the information above is true and correct.

Message from webpage

You have selected the School of Attendance is NOT correct. Please click the link and you will be directed to the School Change screen to complete the required transaction.

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If the school listed is not the school they will be attending, they can request a school change by simply clicking on the Submit School Change link.

# School Change

CALIFORNIA STUDENT AID COMMISSION

WEBGRANTS 4 STUDENTS

Cal Grant Chafee Grant Home Tools Links Help Sign Out Middle Class Scholarship

Cal Grant Main Change My Address View My Application Status View My Award Detail View My CA Aid Report (CAR) View My Payment History Submit School Change Third Party Access to My Account Submit School Leave of Absence

### Submit School Change

- Schools will be notified of school changes.
- New awardees** - To see eligibility at other schools, use the [School Change Simulator](#).
- Renewal Students** - You may submit a school change for next term. Please use the [Future School Change](#) screen to make these changes.
- Select the appropriate academic year from the "Search By Academic Year" field below, and select "Go". The academic year begins with the Fall term.

Search By Academic Year = 2017-2018   

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They need to make sure the correct award year is selected.

# School Change

Current School of Attendance: 00131300 - UNIV OF CA - DAVIS  
Current Housing Status: WITH PARENTS

## Schools listed on FAFSA or CADAA

Institution Code	Institution Name
00131300	UNIV OF CA - DAVIS
00115000	CSU SACRAMENTO

## Request a School Change TO a New School

 School Change To:

 Term Change To Occur:

Please allow up to one week for your school to receive the updated information. You may contact your financial aid office to determine what they might need from you to determine your eligibility.

I understand that:

- My final Cal Grant award amount will be determined by my school.
- My school will re-verify my Cal Grant eligibility prior to disbursing my award.
- School changes reported too late may result in non-payment for one or more terms.
- When submitting a school change, make sure the school listed is listed on your financial aid application.



  I have read and understand the above statements.



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The corresponding page will display the schools the student listed on his/her financial aid application, as well as the option to Complete a School Change to a different school.

The student must select the appropriate school (School Change To:) and select when they would like the change to occur (Term Change to Occur:).

Students must certify they have read and understood the statements presented with the school change, then hit submit. Once the student has completed this requirement they will receive a notification that their school of attendance has been confirmed.

# High School Graduation Verification



WEBGRANTS 4 STUDENTS

- Cal Grant
  - Chafee Grant
  - Home
  - Tools
  - Links
  - Help
  - Sign Out
  - Middle Class Scholarship
- [Cal Grant Main](#) | [Change My Address](#) | [View My Application Status](#) | [View My Award Detail](#) | [View My CA Aid Report \(CAR\)](#) | [View My Payment History](#) | [Submit School Change](#) | [Third Party Access to My Account](#) | [Submit School Leave of Absence](#)

## Cal Grant Main Menu

**STOP** Required items are marked below. You must complete all requirements in order to receive your award.

### ACTION ITEMS:

- [Confirmation of School of Attendance](#) Required to complete awarding process.
- [Submit High School Graduation Confirmation](#) Required to receive payment.

### RESOURCES:

- [Understanding My Cal Grant](#)
- [Disqualification Fact Sheet](#)
- [Change My Address](#)
- [View My Application Status](#)
- [View My Award Detail](#)
- [View My CA Aid Report \(CAR\)](#)
- [View My Payment History](#)
- [Submit School Change](#)
- [Third Party Access to My Account](#)
- [Submit School Leave of Absence](#)

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Although public schools are required to certify their students' High School Graduation, students have the option to confirm their High School Graduation if their school has not completed this process.

# High School Graduation Verification

## California High School Graduation Certification Form

Earlier this year the California Student Aid Commission (CSAC) offered you a Cal Grant Entitlement Award to help pay for your college expenses. Prior to receiving your Cal Grant Entitlement Award, CSAC must receive confirmation of your high school graduation, or its equivalent. Please complete the information below so we can continue processing your Cal Grant Entitlement Award.

**What if I still have courses or other requirements to complete before I actually can graduate high school?**  
Do not complete the form below until you have completed all of your high school's graduation requirements. If you have not yet completed all of your high school's graduation requirements, but expect to graduate before December 31, 2017, please do not complete the information below at this time. You have until December 31, 2017, to complete your high school's graduation requirements. Once you do graduate, come back to this form and complete it at that time.

If you definitely will not graduate by December 31, 2017, select button C below.

Please select a button that best fits your educational status.

 **A**  I have completed all of my high school requirements and graduated.  
Month and year of your high school graduation date. The current date on file is: **JUN, 2017** Update high school graduation date **ONLY** if different than date on file:    
**Or**

**B**  I did not complete the standard high school graduation requirements, but did pass the California High School Proficiency Examination (CHSPE) or General Education Development (GED) Date:    
**Or**

**C**  I did not graduate. Please note that selecting this option will disqualify you from the Cal Grant Entitlement Award.

  **Student Certification:** By selecting the check box and clicking the **Submit** button below, I am affirming that I have completed all of my high school graduation requirements or I have passed a high school equivalency test such as a GED. I understand that it is illegal to report false or misleading information. I have read the information printed above and certify under penalty of perjury under the laws of the state of California, that the information above is true and correct.



After clicking on the Submit High School Confirmation link, the student will be presented with the California High School Graduation Certification Form. The student must select the option that best fits his/her current educational status.

If the student has graduated, they will select option A, certify, then hit Submit.

# High School Graduation Verification



WEBGRANTS 4 STUDENTS

[Cal Grant](#) [Chafee Grant](#) [Home](#) [Tools](#) [Links](#) [Help](#) [Sign Out](#)  
[Middle Class Scholarship](#)

[Cal Grant Main](#) [Change My Address](#) [View My Application Status](#) [View My Award Detail](#) [View My CA Aid Report \(CAR\)](#) [View My Payment History](#) [Submit School Change](#) [Third Party Access to My Account](#) [Submit School Leave of Absence](#)

## California High School Graduation Certification Form

Your graduation date of 06/2017 has been successfully certified. [Click here to go to the Cal Grant Main Menu.](#)

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Once the student has completed this requirement, they will get a notification that their high school graduation date has been successfully certified.

# High School Graduation Verification

## Cal Grant Main Menu

What is the purpose of your visit today?

### RESOURCES:

- [Understanding My Cal Grant](#)
- [Disqualification Fact Sheet](#)
- [Change My Address](#)
- [View My Application Status](#)
- [View My Award Detail](#)
- [View My CA Aid Report \(CAR\)](#)
- [View My Payment History](#)
- [Submit School Change](#)
- [Third Party Access to My Account](#)
- [Submit School Leave of Absence](#)



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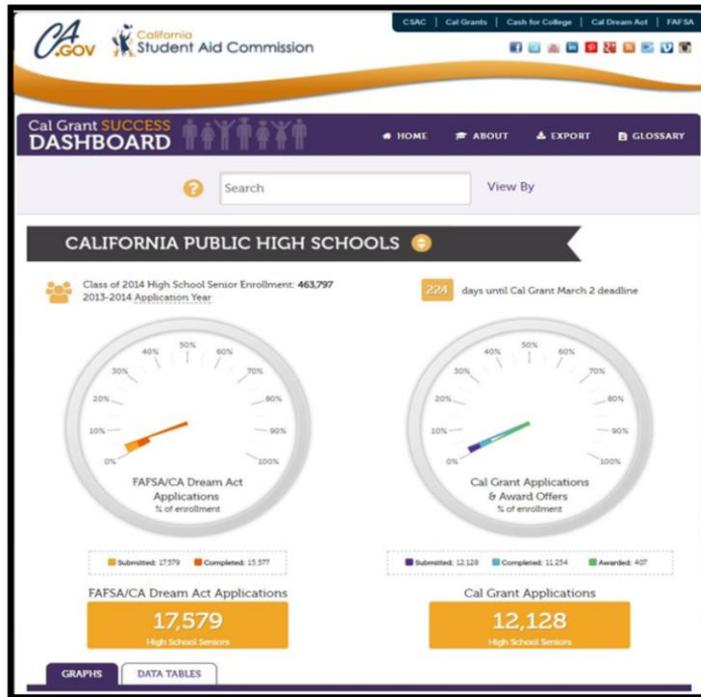
Once all requirements have been completed, they will no longer be visible on the Cal Grant Main Menu. The student would have successfully claimed his/her Cal Grant award and should now make sure to contact the financial aid office to complete any outstanding requirements to receive disbursement of any applicable financial aid.

# California Student Aid Commission

**Resources**



# Cal Grant Success Dashboard



*Making education beyond high school financially accessible to all Californians.*

We are excited to announce that we will soon be providing a new tool to public high schools and high school districts to help them better track their students as they go through the application process. The CAL GRANT SUCCESS DASHBOARD will help to track the total number of applications submitted and completed, and show how many of those students are ultimately awarded a Cal Grant. The totals will update weekly as we receive and process applications.



## CASH FOR C//LLEGE

- FREE financial aid workshops
- Over 900 held throughout California during the 2016-17 application cycle
- Open to students and parents
- Any school or organization can host workshops

### To host a workshop:

For workshop registration, order materials, access training and resources, please visit:

[www.Cash4College.org](http://www.Cash4College.org)



*Making education beyond high school financially accessible to all Californians.*

Cash for College, which is administered by the Commission, is a great resource for students and parents.

This partnership program hosts financial aid workshops statewide to assist students and parents in completing and submitting their FAFSA, or California Dream Act Applications and Chafee application for eligible foster youth.

The Cash for College program focuses on low income and first-generation college-goers, providing line by line FAFSA and California Dream Act Application assistance. Some workshops offer assistance in multiple languages.



# CASH FOR C//LEGE

CA GOV

California Student Aid Commission CASH FOR C//LEGE

Resources Partners CSAC Organization Student Login Privacy Policy

2016-17 Workshop Information

Starting October 1 through the March 2 Cal Grant deadline, students and families can attend FREE Cash for College workshops across California for help completing the Free Application for Federal Student Aid (FAFSA) or California Dream Act (CADAA) and Chafee for Foster Youth applications.

Our mission is to help low-income and first generation college-goers complete the application process so they can access financial aid for education and career/technical training beyond high school.

Elected Officials Only

www.cash4college.csac.ca.gov

KTCGU Refresh

Refresh Input symbols

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This is the Cash for College home page. It can be found at [www.cash4college.csac.ca.gov](http://www.cash4college.csac.ca.gov). From this site, students and their families can search and register for nearby workshops. If you do not host your own Cash for College workshop, please encourage all of your students and their families to attend one in your area.



## **CASH FOR C//LLEGE**

### **Partnering with Cash for College**

Register to host a Cash for College Workshop and Gain Access to:

- A secure website to manage workshops and student follow-up
- Specialized trainings, resources, marketing and outreach materials, and additional support
- Student Data and "How Did We Do" Reports
- Site support in the amount of \$300 (eligible workshops per Partnership Agreement)

Learn more about what a partnership with Cash for College entails at [www.cash4college.org](http://www.cash4college.org)

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If your high school becomes an approved partner and registers a workshop, your school will gain access to the Workshop Management System which will allow you to manage your workshop and do student follow-up. This website enables you to assign site users and contacts, order materials, and access training and useful resources to make your workshop successful.



- Central Coast
- Central Valley
- East Bay
- Long Beach
- Los Angeles
- Merced
- Northcoast
- Sacramento
- San Diego and Imperial
- San Francisco
- San Jose
- Santa Barbara
- Solano
- South County
- Gilroy
- South San Joaquin

**15 Regional Consortia Serving 126 School Districts**

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Cal-SOAP, is another program administered by the Commission, which is also a great student resource. The Cal-SOAP is an organization that goes into schools in certain areas to raise achievement levels of low-income students. They focus on regions with low college participation rates and assist with tutoring, financial aid workshops and more. You can learn more about Cal SOAP on our website.

# Commission Notifications



## Operations Memos



## Special Alerts



## Live Commission Meetings on [www.csac.ca.gov](http://www.csac.ca.gov)

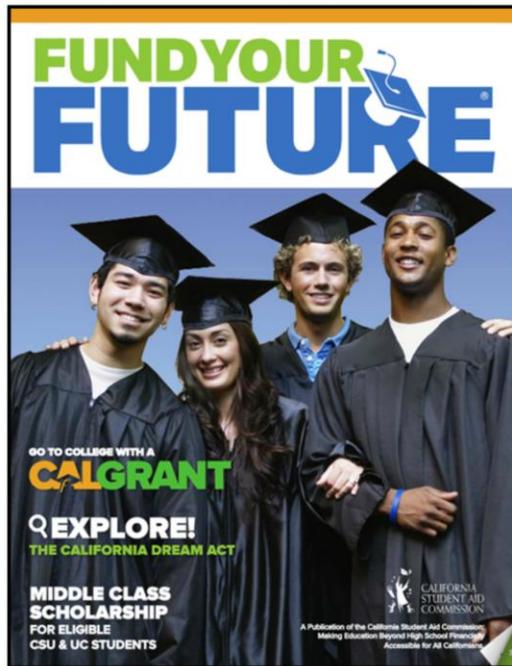
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We encourage you to subscribe to our listserv to receive operations memos and special alerts in your email to keep you up to date and informed about important deadlines, award cycles and other useful information regarding our operations and financial aid. There is a link to subscribe at the bottom of the Commission's homepage at [www.csac.ca.gov](http://www.csac.ca.gov).

Commission meetings are recorded so that you can be better informed about the changes within the Commission and financial aid across California.

# Fund Your Future Magazine

<http://www.fundyourfuture.org>



Another great resource we offer is called the Fund Your Future Magazine. The magazine is available in English and Spanish and it can be ordered by going to the “Reports and Publications” link on our website. We also have an online version of these, as well as other publications in different languages. All of these resources are free to high school counselors.

# Ad Hoc Trainings and Webinars

- Financial Aid Nights
- Dreamer Conferences
- College Fairs
- High School Groups
- Tailored Webinars



*Need more information? Contact our Institutional Support Unit.*

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The California Student Aid is often available to provide presenters and/or to table at different financial aid events throughout the year, such as:

- \* **Financial Aid Nights**
- \* **Dreamer Conferences**
- \* **College Fairs**
- \* **High School Groups**
- \* **Content Specific Webinars**

If you are interested in having a representative from the California Student Aid Commission present or table at your event, please contact our Institutional Support Unit.

# Social Media



Like us on Facebook at:  
[Facebook.com/CSAC.StudentAidCommission](https://www.facebook.com/CSAC.StudentAidCommission)



Follow us on Twitter:  
[@castudentaid](https://twitter.com/castudentaid) #CalGrants



Follow us on Instagram:  
[castudentaid](https://www.instagram.com/castudentaid)

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Social Media is a great way to share and communicate with faculty and students. It is extremely important to share our message to better inform California students about financial aid.

# Grant Delivery System Modernization (GDSM)

The modernization of the Grant Delivery System will update, integrate, and modernize the outdated program. Future Goals for GDSM:

- Deliver High Quality Student Service
- Expedite Processing of Applications
- Outreach & Marketing
- Provide College Services
- Just-in-time payments to college



*[GDSMproject@csac.ca.gov](mailto:GDSMproject@csac.ca.gov)*

The Grant Delivery System Modernization (GDSM) is a project designed to update, integrate and modernize the outdated GDS program. The goal is to fix the deficiencies in our current system.

# Arthur S. Marmaduke High School Counselor Award



An annual **CASH** award to honor a counselor with exemplary skills in helping students go to college

- Applications will open October 2017
- Nominations can be submitted by
  - District/County Leadership
  - School counselor/teacher colleagues
  - Site Administrators
- More information can be found in the resources section of your workbook or at [www.csac.ca.gov](http://www.csac.ca.gov)

The Arthur S. Marmaduke award is an award that goes to one outstanding California high school counselor who demonstrates exemplary skills in helping students fulfill their dreams of going to college. The high school counselor selected receives a cash award. The Commission is currently seeking nominations for the 2017-18 school year. They can be nominated by district and county leadership, school counselor/teacher colleague, and/or site administrators.

# Take our survey!



- Give specific feedback about this workshop
- Rate the presenters
- Make suggestions on what to add or remove

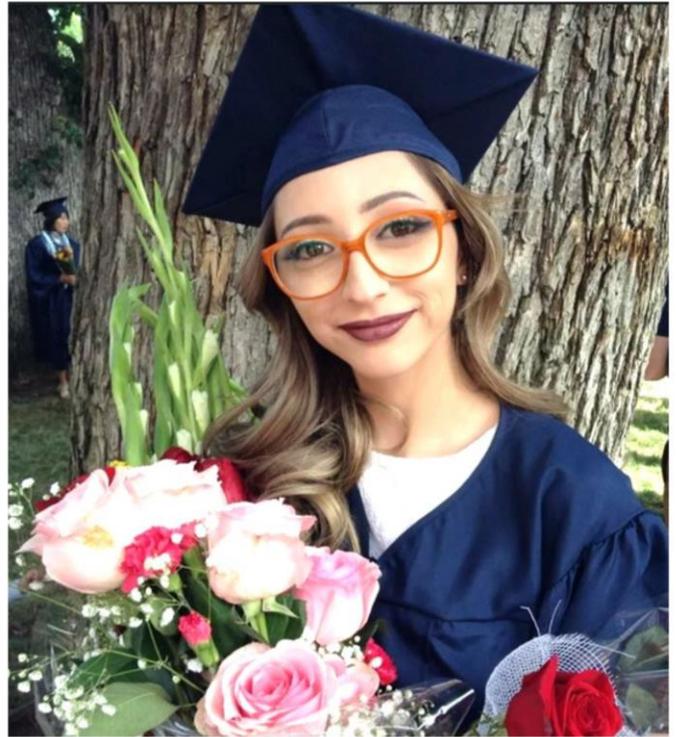
*Survey will be sent after today's training!*

We send all participants a survey following each workshop. We encourage you to respond to this survey to let us know not only what you thought about today's workshop, but to offer suggestions on what additional material you would like to see added.

Remember, many of the changes we make each year to our trainings come as a result of your input and suggestions.

# With your help, Diana...

- ★ Graduated from High School
- ★ Enrolled full-time in a Community College
- ★ Received a Cal Grant!



Finally, with your help and guidance, Diana was able to graduate from high school and get a Cal Grant and other financial aid that allowed her to start college. Good job!

# Next Up, FAFSA!

Institutional Support

1-888-294-0153

[schoolsupport@csac.ca.gov](mailto:schoolsupport@csac.ca.gov)

Student Support

1-888-224-7268

[studentsupport@csac.ca.gov](mailto:studentsupport@csac.ca.gov)

[www.csac.ca.gov](http://www.csac.ca.gov)

*Making education beyond high school financially accessible to all Californians.*

We want to thank you for attending this training. We hope the information we have provided today proves to be helpful to you in assisting your students. We know that you all contribute to your students' future success and we encourage you to keep up the good work. Together we can make higher education financially accessible to all students.

If you have additional questions that come up later, we welcome you to contact us in the Institutional Support line or email.

And if parents or students have any questions, we have specialists in the Student Support unit who will be happy to assist them.

# Federal Updates & The FAFSA



© 2017 CASFAA



Welcome to the High School Counselors Workshop, sponsored by the California Community Colleges Student Financial Aid Administrators Association (CCCSFAAA), the California Association of Student Financial Aid Administrators (CASFAA), ECMC and the California Student Aid Commission (CSAC).

Today, we're going to go through a number of updates to the financial aid process, most of them from the federal government, the FAFSA process, and special situations you probably have all heard from your most at-risk students. There aren't many changes to the FAFSA, so we will spend more time discussing these special circumstances that need that extra attention.

We will have time at the end of the presentation for any questions, so please try to hold questions until then.

## Last Minute Updates

Slides with updates and new slides not found in the paper workbook will have



in the bottom/right corner, so take a photo to capture the information.



© 2017 CASFAA

As is always the case, there are some last minute updates received AFTER we sent this presentation for printing in the High School Counselors Workshop workbook. So, when you see this camera icon in the bottom right corner of a slide, you should take a picture of the slide, as this is a slide that is not in the printed workbook or a slide with updated information.

After all of the workshops have ended, CSAC and CASFAA will post the final version of this PowerPoint presentation, which include ALL slides, notes, and all updates.

## What's New for 2018–2019

### Early FAFSA Launch – 2<sup>nd</sup> year

- 2018–2019 FAFSA available starting on October 1, 2017, at [fafsa.gov](http://fafsa.gov)
- Change to October 1 launch is permanent

### Earlier Income Information now Required

- 2016 tax & income information required
- IRS Data Retrieval Tool available upon launch of FAFSA (October 1)

© 2017 CASFAA

- The 2018–2019 FAFSA cycle, like the 2017-2018 FAFSA cycle, will begin earlier than previous FAFSA application cycles. Beginning October 1, 2017, your students will be able to fill out their FAFSAs for the 2018–2019 school year. As recently as the 2016-2017 cycle, they had to wait until January 1.
- The earlier submission date is a permanent change, enabling students to complete and submit a FAFSA as early as October 1 every year.
- With the adjustment to the timetable for FAFSA availability, there is also a change in the income and tax reporting on the FAFSA. For the 2018–2019 FAFSA, students and parents will report income and tax data from 2016.
- One benefit of this change is that applicants will no longer need to estimate tax information—and many of them will be able to retrieve their information directly from the IRS using the IRS Data Retrieval Tool, right from the first day the FAFSA is available. We'll talk about other benefits in a moment.

# Reasons for the Changes

## Alignment

- Many admissions application deadlines occur in the fall
- FAFSA completed at same time = less confusion

## Certainty

- No need to estimate income and tax info
- IRS Data Retrieval Tool available when FAFSA launches
- Earlier receipt of Expected Family Contribution (EFC)

## Less Time Pressure

- More time before (most) state and school deadlines
- More time to compare schools and award letters before the May 1 National Candidate's Reply Date



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Recent research and the Department of Education's own data suggest that implementing an earlier start date and using earlier income information will benefit students.

### Reason #1: Alignment

- This is a benefit of the earlier launch date.
- For some students, the traditional FAFSA application cycle is not aligned with college admissions application deadlines, which typically occur in the fall prior to the FAFSA launch. The new financial aid application process better aligns with the college admission process for those students.

### Reason #2: Certainty

- This is a benefit of the FAFSA asking for Prior-Prior Year income and tax information.
- Many deadlines for state aid, including California, are as early as March. When the FAFSA asked for information about tax forms that weren't due until April 15, applicants had to estimate income and/or taxes paid in order to meet those state deadlines.
- Many students and parents mistakenly thought they were not able to file a FAFSA until after they filed their tax return. This caused many students to miss certain federal, state and/or institutional financial aid deadlines.
- As a result of the change to requiring Prior-Prior Year income and tax information, more students and families will be able to complete FAFSAs using data imported electronically from the IRS, rather than submitting applications with estimates that may need correcting later.
- Students also will have information about their Expected Family Contributions earlier, helping them as they go through the college application and selection process.

### Reason #3: Less Time Pressure

- This is a benefit of both the early launch and earlier income and tax info being required.
- Students and parents will have more time to explore and understand financial aid options and apply for aid before state and school deadlines.
- Note: some financial aid deadlines for first-come, first-served aid changed from "as soon as possible after January 1" to "as soon as possible after October 1."
- If a student fills out the FAFSA earlier and gets aid offers from schools earlier, he or she will have more time to compare schools before committing to one.
- Studies show that students who apply during the first three months of the FAFSA submission period tend to receive, on average, twice as much grant (free) money.

## FAQs About Timing & Reporting

### Can a student choose to report 2017 income information?

- No – student does not have a choice of which year to report
- Must report info for the year that is required by the FAFSA
- Remember – Certain items on FAFSA are “as of today,” so students must read each question and fill out accordingly

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### Can a student choose to report 2017 income information if the family’s financial situation has changed since their 2016 taxes were filed?

- No. Please emphasize to your students that they cannot choose which year’s information to report. They cannot substitute 2017 tax returns for 2016 tax returns, even if they have already filed their 2017 federal income tax returns.
- The student must report the information the FAFSA asks for. If the family’s income has changed since the 2016 tax year, the student should provide 2016 information on the FAFSA, submit the FAFSA, and then talk to the college financial aid office about any changes in the family’s situation.
- Note: For certain items on the FAFSA, such as marital status and asset information, the student must report these items “as of today.” For example: the balance of cash, checking and savings accounts “as of today” is easy to look up and report.

However, it could get tricky when it comes to the student’s or parent’s marital status. The FAFSA asks for marital status “as of today” (the day the FAFSA is completed and submitted). So, if the student or parent is married now but wasn’t in 2016 (and therefore didn’t file taxes as married), the spouse’s income and share of net asset values will need to be included on the FAFSA. Similarly, if the student or parent filed 2016 taxes as married but is no longer married when filling out the FAFSA, the spouse’s income and his/her share of net asset values will need to be excluded from the amounts listed on the FAFSA.

## FAQs About Timing & Reporting

### Will students receive aid offers earlier if they apply earlier?

- Not necessarily – some schools will make offers earlier; others won't
- [collegescorecard.ed.gov](http://collegescorecard.ed.gov) allows for cost comparison of schools based on averages

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### Will students receive aid offers earlier if they apply earlier?

- Not necessarily, as some schools will make offers earlier while others won't.
- You might want to recommend that students look at the College Scorecard at [collegescorecard.ed.gov](http://collegescorecard.ed.gov) to compare costs at different schools while they wait for aid offers to arrive.
- Note: The maximum Federal Pell Grant or state Cal Grant awards for 2018–2019 won't be known until late 2017 or early 2018, so keep in mind that even that if a student does receive an aid offer early, the offer could change due to various budgetary constraints.

## What's Changing for 2018-2019

### IRS Data Retrieval Tool (IRS DRT)

- Enhanced privacy for IRS DRT users
- Limit on information displayed to applicant
- Information encrypted and hidden from applicant's view
- Messaging presented on-screen regarding inability to see information

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**There are some changes occurring in regards to the IRS Data Retrieval Tool for the 2018-2019 FAFSA application cycle.**

For those who hadn't heard, sometime in March 2017 the IRS disabled the Data Retrieval Tool, due to security concerns. Shortly thereafter, it was announced that the Tool would remain unavailable for the remainder of the 2016-2017 and 2017-2018 FAFSA cycles. But, over the summer, it was announced that the Tool would be available for the 2018-2019 FAFSA cycle.

With this announcement came information regarding enhanced privacy for IRS Data Retrieval Tool users. In particular, data imported through the IRS DRT into a FAFSA will not be displayed. The information, encrypted in the transfer process, will be hidden from the applicant's view on both the Data Retrieval Tool and FAFSA websites. Applicants will see messages on the FAFSA webscreens regarding this.

## What's Changing for 2018-2019

### IRS Data Retrieval Tool (IRS DRT)

- Amended tax return filers can use IRS DRT
- Information transferred from IRS to FAFSA will be from original tax return
- IRS will provide an indicator regarding filing of amended tax return
- Removal of filtering question on FAFSA regarding filing of an amended tax return
- Messaging to student/parents to contact FAO

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Some good news for students and parents who filed amended tax returns – They can now use the IRS Data Retrieval Tool. Bad news – the data that will be transferred will be from the original tax return filed by the student or parent. But, the IRS will provide an indicator letting the college know that they (the IRS) have an amended tax return on file, and that the student or parent should contact their college's Financial Aid Office if changes are needed to any of the data transferred from the IRS.

## Mid-Cycle Changes

### Responsive Web Application

- Improves experience for students completing the FAFSA on a mobile device or tablet
- Multi-phase implementation of functionality

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More good news – this time for FAFSA applicants who use mobile devices or tablets for accessing the FAFSA.gov website. The online user experience for these users will be improved due to more responsive web design. Having a more flexible web portal that adjusts automatically to meet the requirements of the applicant's device will make access more efficient.

This redesign will be applied in a multi-phased approach, so not all functions will be impacted during the initial 2018-2019 application cycle.

## Mid-Cycle Changes

### Integration with College Scorecard

- FAFSA applicants can link to the College Score Card website
- Transfer up to ten college selections into the FAFSA

[collegescorecard.ed.gov](http://collegescorecard.ed.gov)

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Lastly, for mid-cycle changes, students who logon to the FAFSA.gov website will be given the opportunity to link to the College Scorecard website, listed on the bottom of the slide, to research colleges. From the College Scorecard website they will be able to transfer up to 10 college selections into their FAFSA. If fewer than 10 are transferred, the FAFSA applicant can add additional colleges while completing their FAFSA.

## Federal Student Aid ID (FSA ID) Enhancements

### SMS/text messaging option for performing certain actions

- Resetting forgotten password
- Retrieving forgotten username
- Unlocking an account

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A number of enhancements have been made to the Federal Student Aid ID (FSA ID) process, considering the lingering issues students and parents are having in creating, retrieving, and unlocking their FSA IDs. To assist, students and parents can add a mobile number from a cell phone or other mobile device to their FSA ID account information, so that they can reset a forgotten password, retrieve a forgotten username, or unlock an account.

## FSA ID Enhancements

**“Significant Date” challenge question now optional**

**Option to link FSA PIN to FSA ID removed**

**New USDE video tutorials**

- How to Create Your FSA ID
- How to Retrieve Your FSA ID Username
- How to Reset Your FSA ID Password

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One of the hardest Challenge Questions for students and parents to answer has been the Significant Date question. The date could not be your birthdate, and apparently many high school teenagers don't have significant dates to reference in their life... yet. Now, the Challenge Question regarding a Significant Date is optional.

Also, as FSA PINs have been fully retired at this point, having passed the 18-month point for when a PIN would expire if not used, the option to link a PIN to an FSA ID has been removed.

Lastly, a number of videos have been created by the U.S. Department of Education (USDE) to help students and parents create an FSA ID, retrieve a username, or reset a password. These videos are available through the FSA YouTube webpage.

# Materials & Resources for Outreach

## Financial Aid Toolkit

The screenshot shows the homepage of the Financial Aid Toolkit. At the top, it features the 'Federal Student Aid' logo (an office of the U.S. Department of Education) and the 'PROUD SPONSOR of the AMERICAN MIND' logo. To the right is the 'Financial Aid Toolkit for COUNSELORS' title. A navigation bar includes links for 'Learn About Financial Aid', 'Conduct Outreach', 'Get Training', and 'Search Financial Aid Tools and Resources'. Below the navigation, a main heading reads 'Help students and parents prepare for college or career school.' followed by a sub-heading: 'The Financial Aid Toolkit provides federal student aid information and outreach tools for counselors, college access professionals, nonprofit mentors, and others.' The main content area is divided into four columns, each with a photo and a title: 'LEARN ABOUT FINANCIAL AID' (with a photo of a man and a woman), 'CONDUCT OUTREACH' (with a photo of a woman speaking at a podium), 'GET TRAINING' (with a photo of a man and a woman), and 'SEARCH TOOLS AND RESOURCES' (with a photo of a woman). Each column contains a brief description of the service.

[FinancialAidToolkit.ed.gov](http://FinancialAidToolkit.ed.gov)

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To help high school counselors and college financial aid staff, Federal Student Aid created the Financial Aid Toolkit, available at [FinancialAidToolkit.ed.gov](http://FinancialAidToolkit.ed.gov). The toolkit consolidates Federal Student Aid resources into a searchable online database for use by organizations and individuals who interact with, support or counsel students and families on making financial preparations for postsecondary education.

## Materials & Resources for Outreach

### Financial Aid Toolkit

- Talking points
- Table of FAFSA launch dates and tax years
- Fact sheets for counselors, parents, and students
- Outreach calendar
- PowerPoint presentations
- Information regarding upcoming webinars

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You'll find general information about the FAFSA, as well as tips and talking points for your outreach to students and their families. Items you can use in your outreach, including fact sheets, videos, infographics, sample tweets, and more, are available for download through the Toolkit. And, if you're looking for webinars to brush up on financial aid, the Toolkit has the information you need.

# Materials & Resources for Outreach

## Financial Aid Toolkit – Resources

Use the search tool below to filter our Financial Aid Toolkit resources to find just what you need. You can select one or more options in each dropdown box. If you don't select any options from a dropdown box, that box will default to all options being selected.

You may need certain [plugins](#) or [viewers](#), such as Adobe Reader, to view some resources.

Would you like to know each time we add a resource to the site? Subscribe to our RSS feed by clicking on the orange and white icon below. (Using Chrome? You may want to install the [RSS Feed Reader](#) for easier viewing of the feed.)

Want to browse our Financial Aid Toolkit resources rather than searching for something specific? [View all financial aid tools and resources.](#)

Curious to see which resources are most popular? [View the last 30 days' most-downloaded resources.](#)

I AM LOOKING FOR	TO HELP	LEARN ABOUT
<b>Resource Type</b> All <input type="checkbox"/> Glossaries <input type="checkbox"/> Handouts <input type="checkbox"/> How-To Guides <input type="checkbox"/> Infographics <input type="checkbox"/> Presentations <input type="checkbox"/> Public Service Announcements <input type="checkbox"/> Social Media Content <input type="checkbox"/> Templates <input type="checkbox"/> Videos <input type="checkbox"/> Web Resources and Tools <input type="checkbox"/> Webinars and Audio Files <b>DONE SELECTING</b>	<b>Audience Type</b> All <input type="checkbox"/> Middle School Students <input type="checkbox"/> High School Students <input type="checkbox"/> Adult Students <input type="checkbox"/> Current College Students <input type="checkbox"/> Graduate or Professional Students <input type="checkbox"/> Parents <input type="checkbox"/> Military Families <input type="checkbox"/> Federal Student Loan Borrowers <input type="checkbox"/> Spanish Speakers <input type="checkbox"/> Middle School Counselors <input type="checkbox"/> High School Counselors <input type="checkbox"/> College Access Professionals <input type="checkbox"/> Community-Based Organizations <b>DONE SELECTING</b>	<b>Topic</b> All <input type="checkbox"/> College Preparation <input type="checkbox"/> Types of Aid <input type="checkbox"/> Eligibility <input type="checkbox"/> FAFSA <input type="checkbox"/> 2017-18 FAFSA <input type="checkbox"/> FSA ID <input type="checkbox"/> Receiving Aid <input type="checkbox"/> Loan Repayment <input type="checkbox"/> Financial Literacy <input type="checkbox"/> Consumer Protection <input type="checkbox"/> Hosting a Financial Aid Event <input type="checkbox"/> Using Federal Student Aid Resources <b>DONE SELECTING</b>

**GET RESOURCES**  
or Clear Selection

[FinancialAidToolkit.ed.gov/resources](http://FinancialAidToolkit.ed.gov/resources)

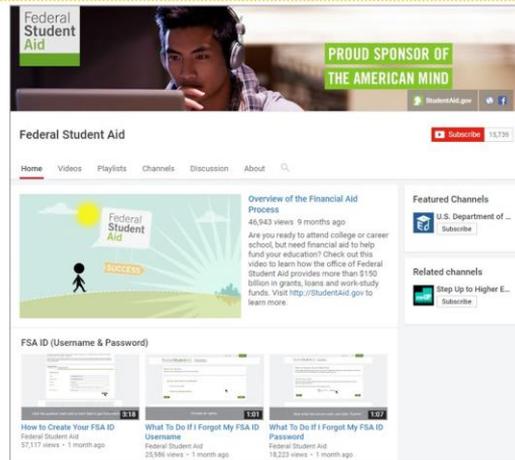
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In particular, if you navigate to the Resources section of the Toolkit, you'll be presented with drop-down menus from which you can filter your choices for the types of resources you seek, the audience you are working with, and the specific topic you want to cover. For illustration purposes, we've shown all the current choices on each of the drop-down menus on the Resources page.

# Materials & Resources for Outreach

## Social Media

- [Twitter.com/FAFSA](https://twitter.com/FAFSA)
- [Facebook.com/FederalStudentAid](https://facebook.com/FederalStudentAid)
- [YouTube.com/FederalStudentAid](https://YouTube.com/FederalStudentAid)



## FSA's YouTube Page

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The Office of Federal Student Aid is on **Twitter** and **Facebook** and encourages counselors and college access mentors to retweet or share posts. Federal Student Aid also has a **YouTube** channel with several playlists on college-prep and financial aid topics, including the FAFSA. You are welcome to link to the videos or embed them in your own website. Federal Student Aid's content is in the public domain, so you may share it (as long as you don't charge people for it).

# FAFSA on the Web (FOTW)



California Community Colleges  
Student Financial Aid Administrators Association



ECMC



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# FAFSA on the Web (FOTW)

## Start here for:

- Initial FAFSA
- Corrections
- Signatures / FSA ID
- Continuing a saved FAFSA
- Renewal FAFSA

[www.fafsa.gov](http://www.fafsa.gov)



As mentioned earlier, there are only a few major changes to the actual application to the **2018-2019 FAFSA**. Through the FAFSA on the Web (FOTW) website, students can still:

- Complete their initial FAFSAs,
- Make corrections to their FAFSAs—updating income and tax information, adding/deleting schools & updating housing plans,
- Enter signatures—using student and/or parent **FSA IDs**,
- Continue to complete a saved FAFSA, and
- Complete a renewal FAFSA—in subsequent years, students will be able to submit a renewal FAFSA which will pre-populate demographic fields from a previous year's FAFSA.

## FOTW – Seven Sections of FAFSA Fun!

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- 1 – Student Demographics
- 2 – **School Selection**
- 3 – **Dependency Status**
- 4 – **Parent Demographics**
- 5 – Financial Information
- 6 – Sign and Submit
- 7 – Confirmation

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For 2018-2019, the FAFSA on the Web (FOTW for short), still has seven sections. We won't cover all sections this year at the workshop, but instead focus on three sections that give our shared students the most headaches. In particular, we will look at School Selection, Dependency Status, and a portion of the Parent Demographics sections in the next few slides.

# School Selection

The screenshot shows the 'School Selection' section of the FAFSA application. At the top, there are tabs for Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'School Selection' tab is active.

Below the tabs, there is a message: 'Search successfully completed. Check the Search Results table for schools meeting your search criteria.' Below this, there is a search form with fields for State (California), City (optional), School Name (Merced), and Federal School Code. A 'SEARCH' button is present. A red box with the number '1' points to the 'SEARCH' button.

Below the search form, there is a 'Search Results' table. A red box with the number '2' points to the 'Add' button next to the first school entry: 'MERCED COMMUNITY COLLEGE - MERCED, CA'. A red box with the number '3' points to the 'Add' button next to the second school entry: 'UNIVERSITY OF CALIFORNIA, MERCED - MERCED, CA'.

On the right side of the 'Search Results' table, there is a 'Selected Schools' table. It contains a list of schools that have been added to the selection, including 'MERCED COMMUNITY COLLEGE - MERCED, CA', 'UNIVERSITY OF CALIFORNIA, MERCED - MERCED, CA', 'WESTMEDI COLLEGE - MERCED, CA', 'BRUNE VALLEY COLLEGE - BRUNE, CA', 'CALIF STATE UNIV-NORTHEDGE - NORTHEDGE, CA', 'CALIF STATE UNIV - FRESNO - FRESNO, CA', and 'FRESNO CITY COLLEGE - FRESNO, CA'. A 'VIEW SELECTED SCHOOL INFORMATION' button is located below the 'Selected Schools' table.

At the bottom of the page, there is a copyright notice: '© 2017 CASFAA'.

As mentioned earlier, students can transfer up to ten colleges from the College Scorecard website. If they choose not to, then the process for adding colleges to their FAFSA will look the same as it has for the past few years when they arrive at the School Selection section (say that fast!). There are still a few tips to give for students completing this section of the FOTW.

**First:** Students can enter up to **ten colleges** on FOTW. Students who are applying to a greater number of schools will have the opportunity to add additional colleges and/or correct their FAFSA information after initial submission and processing of their FAFSA.

**Second:** There is **no need to put schools in any particular order**. Colleges, when they receive the results of a student's FAFSA, will only see their college in the School Selection section. For Cal Grant awarding, CSAC will require students to select their college of attendance at some point **AFTER** the results of the student's FAFSA are processed and Cal Grant eligibility is determined.

**Third:** For students who are absolutely certain they are leaving California to attend an institution outside the state – we highly recommend they include at least one “fallback” school in California. Why? Although they could add a California school **AFTER** March 2 and still be given Cal Grant consideration, having at least one California college listed **BEFORE** March 2 will allow the student to see if they have Cal Grant eligibility at a California school and the corresponding award amount.

If a student does not list any California schools on their initial FAFSA, they will be withdrawn from Cal Grant consideration. If they later decide to attend a school in California, they will need to add that school to their FAFSA application **AND** complete the “Entitlement Cal Grant Application Correction Form.” They can do this via their **WebGrants 4 Students** account or by contacting the California Student Aid Commission. This will then allow them to be “reprocessed” by CSAC for Cal Grant consideration.

**Fourth:** When schools have Early Admission deadlines or Priority Processing deadlines for financial aid, students should make sure they include them on their initial FAFSA submission.

Now, to address students who are considering **more than 10 colleges**. If you have students who are in this status, they should follow the **four rules** we just talked about. Once their FAFSA is processed, they can go back to FOTW, log in, go to the School Selection section, remove schools, then add new schools. They, and their parents, will need to use their FSA IDs to resubmit their information, but all the new schools will now receive their FAFSA information. Once a school receives it, even if a student takes the school off their list, the school can process the student for financial aid.

Students can also utilize the DRN number on their Student Aid Report (SAR) and call the Federal Student Aid Information Center at 1-800-4-FED-AID (1-800-433-3243) where they can assist in adding colleges to the student's School Selection section.

If students use the FAFSA website, it's a quick 1-2-3 process. First, they should search for their college (pick the state and a couple of major words in the name of the school – no need to get it exactly perfect). Hit the search button. Second step – a listing of colleges satisfying the search requirements should pop up. The student can click the box to the left of the college, or colleges, they want to add to their list. Third step – hit the Add button. The selected colleges should now show up on the right side, where the student can have up to 10 colleges selected to receive the results of their FAFSA.

# Dependency Determination

**NO** to all questions:

- makes the student “dependent”
- Must submit parent information

**Note:** Child must be supported financially — *more than 50%*

Dependency Determination

Application was successfully saved.

Were you born before January 1, 1995?  
 Yes  No

As of today, are you married?  
 Yes  No

At the beginning of the 2018-2019 school year, will you be working on a master's or doctorate program (such as an M.A., M.B.A., M.D., J.D., Ph.D., Ed.D., or graduate certificate, etc.)?  
 Yes  No

Do you now have or will you have children who will receive more than half of their support from you between July 1, 2018 and June 30, 2019?  
 Yes  No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2019?  
 Yes  No

Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?  
 Yes  No

Are you a veteran of the U.S. Armed Forces?  
 Yes  No

At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?  
 Yes  No

As determined by a court in your state of legal residence, are you or were you an emancipated minor?  
 Yes  No

Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?  
 Yes  No

On or after July 1, 2017 were you homeless or were you self-supporting and at risk of being homeless?  
 Yes  No

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

The FAFSA uses this Step to determine the dependency status of the student for financial aid purposes. Students may think they are independent, but the FAFSA questions in this section will determine if the student is determined to be independent or dependent.

The first few questions in this section will be pre-filled with answers based on information the student answered in Step One of the form. For example, the question regarding “working on a master’s or doctorate program” refers to the student’s initial academic program of study, not their future plans beyond their initial undergraduate work.

**Children** — answering **YES** to this question means the **student** must be providing **more than 50%** of the child’s financial support throughout the upcoming school year (July 1, 2018 to June 30, 2019). It is not only a matter of caring for the child. Additionally, “child” can include an expected birth (but not yet born) during the specified period. Note that providing more than half support counts support received from sources other than the student’s parents, such as TANF or support from the student’s boyfriend/girlfriend, as though it were provided by the student.

There is a similar financial requirement for claiming other dependents **living with the student**.

For most high school graduates, they will answer **NO** to the questions regarding children and other dependents.

**Note:** A student who can answer **YES** to any question in this section will be considered an Independent student for financial aid purposes.

Now that we’ve touched on the first five questions, let’s dive into some of the trickier questions in this section.

## Foster Youth

---

Select **YES** if at any time since the student turned age **13**, he/she was in foster care even if no longer in foster care today due to:

- Adoption
- Reunification
- Reached the age of majority (18 yrs.)

**Note:** Documentation may be required

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The FAFSA notes that students should answer **YES** if **at any time since they turned age 13** they were in foster care, even if they are no longer in foster care today. For federal student aid purposes, a ward of the court is not someone who is incarcerated. Also, the financial aid administrator at the college or university may require the student to provide proof that he or she was in foster care or a ward of the court.

## Emancipated Minors

Select **YES** if the student:

- as of today, is an emancipated minor, or
- was an emancipated minor immediately before turning 18 years old

**Note:** Documentation (issued from a court in the student's state of legal residence) may be required

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Students should answer **YES** if they can provide a copy of a court's decision that as of today they are an emancipated minor. They can also answer **YES** if they can provide a copy of a court's decision that they were an emancipated minor before they reached the age of being an adult in their state (18 years in California). The court must be located in the student's state of legal residence at the time the court's decision was issued.

Students should answer **NO** if the student is still a minor and the court decision is no longer in effect or the court decision was not in effect **at the time the student turned 18** (became an adult in California).

The financial aid administrator at the college may require the student to provide proof that he/she was an emancipated minor.

An emancipated minor is not the same as emancipation from child support. The former occurs **prior** to the child reaching the age of majority while the latter occurs **when** the child reaches the age of majority. This is a common misunderstanding.

## Legal Guardianship

YES, if...	NO, if...
Student can provide a copy of a court's decision that as of today he or she is in a legal guardianship.	Student is still a minor and the court decision is no longer in effect.
Student can provide a copy of a court's decision that he or she was in a legal guardianship immediately before he or she reached the age of being an adult in his or her state.	The court decision was not in effect at the time the student became an adult.
The court was located in the state of legal residence for the student at the time the court's decision was issued.	The guardianship was established by an attorney but not ordered by a court.

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For this question, the definition of legal guardianship does not include the student's parents, even if they were appointed by a court to be the student's guardian. Students cannot be considered a legal guardian of themselves.

A legal guardianship established by an attorney is not sufficient. The legal guardianship must have been ordered by a court of competent jurisdiction in the student's state of legal residence.

## Homeless, Unaccompanied Youth

Select **YES** if **any time** after **July 1, 2017**, the student meets **ALL three criteria**

### “Homeless” or “at risk of being homeless”

- Lacking fixed, regular and adequate housing. Includes living in shelters, parks, motels or cars, couch surfing, or temporarily living with other people because the student has nowhere else to go, **AND**

### “Unaccompanied”

- Not in the physical custody of a parent or guardian, **AND**

### “Youth”

- Under **24** years of age

Resources for homeless students: [NAEHCY.org](http://NAEHCY.org)

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Students should answer **YES** if they received a determination at any time **on or after July 1, 2017**, that he/she was an unaccompanied youth who was homeless or, at risk of being homeless.

- **Homeless** means lacking fixed, regular and adequate housing, which includes living in shelters, motels or cars, couch surfing, or temporarily living with other people because you had nowhere else to go.
- **Unaccompanied** means the student is not living in the physical custody of a parent or guardian.
- **Youth** means the student is under 24 years of age.

Students should answer **NO** if the student is not homeless, at risk of being homeless or if he/she does not have a determination. Students should contact their financial aid office for assistance if they do not have a determination but believe they are an unaccompanied youth who is homeless or is an unaccompanied youth providing for his/her own living expenses and who is at risk of being homeless.

The financial aid administrator may require the student to provide a copy of the determination if the student answers **YES** to any of these questions.

## Homeless, Unaccompanied Youth

Students are considered to be **independent** if they are determined to be **Homeless Unaccompanied Youth** by:

- The student's high school or school district homeless liaison, **or**
- The director of an emergency shelter or transitional housing program funding by HUD, **or**
- The director of an a runaway or homeless youth basic center or transitional living program, **or**
- The college's financial aid administrator determines they meet the requirements for consideration

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**Certifying officials include** high school district home liaison, U.S. Department of Health and Urban Development (HUD) homeless assistance program director or designee, Runaway and Homeless Youth Act (RHYA) program director or their designee. Also, the college's financial aid administrator can certify the student meeting the Homeless Unaccompanied Youth status, based on the preponderance of available information presented by the student.

## What if...

**Dependency Status Results**

Based on your answers to the dependency status questions, you are considered a **dependent student**. This means you must provide [parental information](#). Select "I will provide parental information" and click **Next** to continue to Parent Demographics.

If you have a special circumstance and are unable to provide parental information, under very limited circumstances, you may be able to submit your FAFSA without parental information. Select "I am unable to provide parental information" and click **Next** to get additional information.

I will provide parental information  
 I am unable to provide parental information

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

**Help and Hints**

**Dependency Status Results**

For dependent students, a special circumstance is a situation that exists between the student applicant and his or her parent(s) which prevents the student from providing parental information.

Select **I will provide parental information** to continue to Parent Demographics.

Select **I am unable to provide parental information** to get additional information about special circumstances.

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If a student has answered **NO** to all of the questions in this Step, he/she will be considered a **Dependent** student for financial aid purposes. As such, he/she will be required to provide parental information in the next Step we'll cover.

For those rare instances where a student cannot provide parental information but has answered **NO** to all of the questions, they have an option to continue completing and submitting their FAFSA. As noted on the screen, they can mark the *"I am unable to provide parental information"* button, click on **NEXT**...

...then...

- Colleges have the authority to “override” federal dependency status
- Process will vary college to college

**Note:** Student **MUST** follow up with college

**Special Circumstances**

**Important:** You told us that you think you have a special circumstance and are unable to provide parental information. Before we allow you to proceed and skip the parental section of your FAFSA we must advise you of the following:

Under Federal law to the extent your family is able, they are primarily responsible for paying for your college expenses. To determine how much your family can afford to pay towards your college expenses, we must collect your financial information and your parents' financial information.

However, Federal law allows for some exceptions, if you have a special circumstance. The following are **examples** of some special circumstances where you may submit your FAFSA without providing parental information:

- Your parents are incarcerated; or
- You have left home due to an abusive family environment; or
- You do not know where your parents are and are unable to contact them (and you have not been adopted).

**But not all situations are considered a special circumstance.** The following are situations that would **not** be considered a special circumstance:

- Your parents do not want to provide their information on your FAFSA; or
- Your parents refuse to contribute to your college expenses; or
- Your parents do not claim you as a dependent on their income taxes; or
- You do not live with your parents.

Now that you have reviewed the information above, select one of the following options and click **Next** to continue.

I will provide parental information

I have a special circumstance and I am unable to provide parental information

I do not have a special circumstance but I am unable to provide parental information

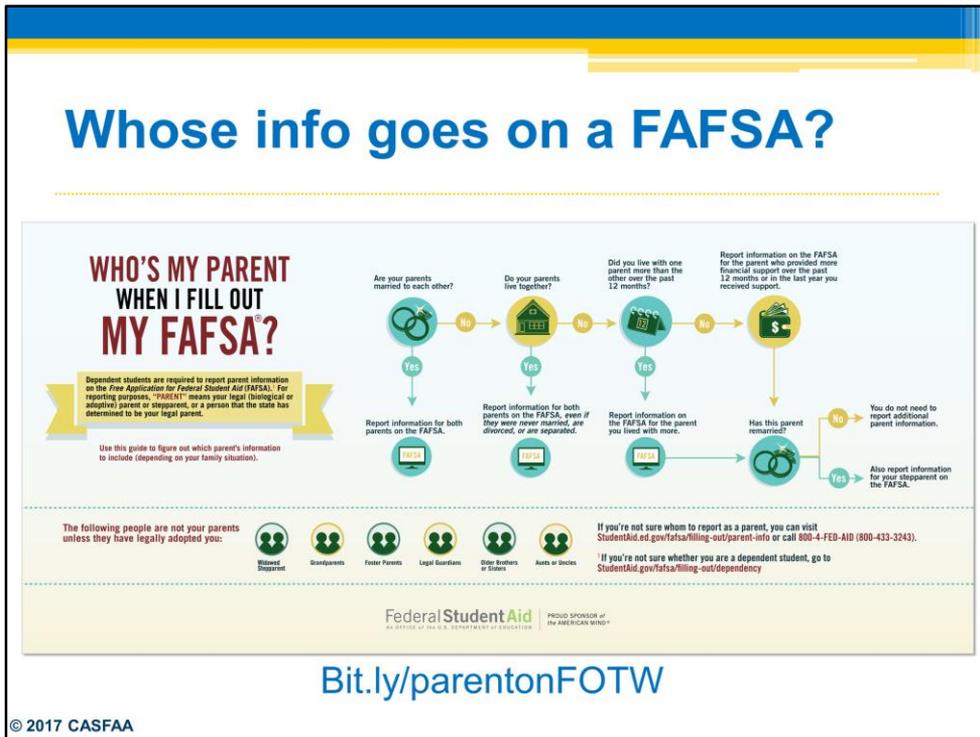
[PREVIOUS](#) [NEXT](#)

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... and they will see this screen [on slide].

The student can continue to complete their FAFSA, skip the Parents section, submit their FAFSA, and it will be processed but only for unsubsidized Direct Stafford Loans initially. No **EFC** (Expected Family Contribution) will be calculated, but all of the listed colleges will receive the FAFSA information. The student will need to follow up with the college (or colleges) for each college's process for determining if they can be considered Independent due to special or extenuating circumstances.

# Whose info goes on a FAFSA?



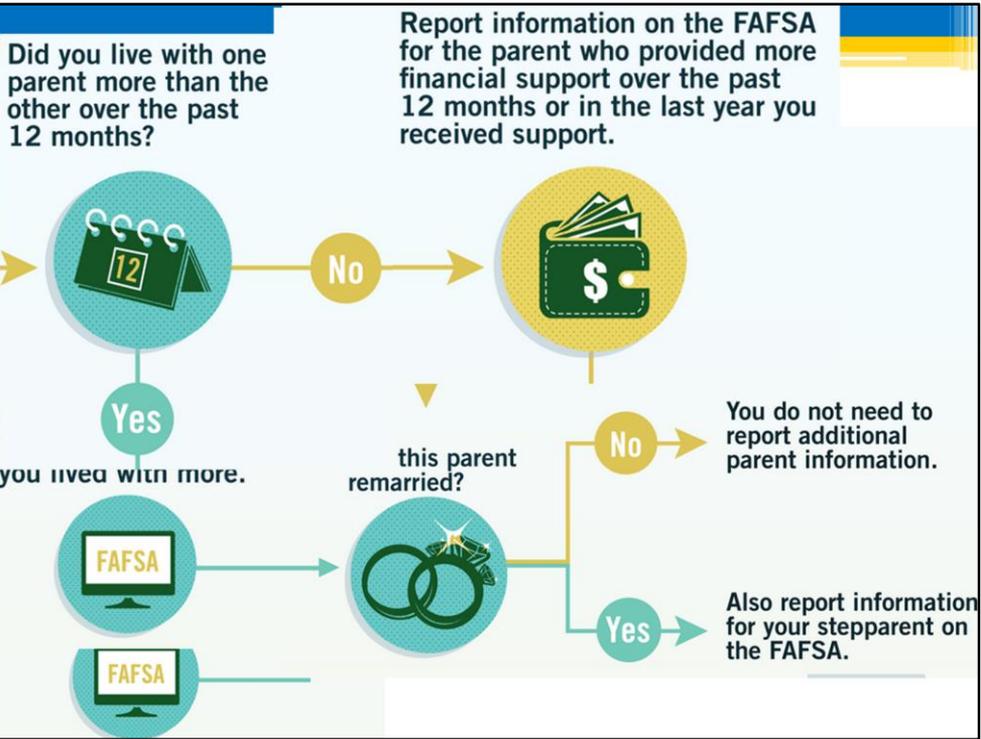
Otherwise, for a large majority of students coming out of high school, we can assume they are considered as Dependent for financial aid purposes. Oftentimes, there are questions regarding which parent, or parents, the student should use for supplying financial and household information on the FAFSA. For a quick reference, here's a nice breakdown that should cover 99% of all possible combinations of parents.

Let's go through the flowchart –

- Are your parents married to each other?
- Do your parents live together?
- Did you live with one parent more than the other over the past 12 months prior to submitting the FAFSA?
- If your custodial parent was divorced or separated, has that parent remarried?

By using this graphic, available in our online Reference Section, you and your students can easily determine which parent's information to report on the FAFSA.

Keep in mind, this flowchart also works for students with same sex parents. If a student's parents are the same sex and married, for example, the student would use both parents' information on the FAFSA, unless the parents are divorced or separated.



**The following people are not your parents unless they have legally adopted you:**



**Widowed Stepparent**



**Aunts or Uncles**



**Foster Parents**



**Grandparents**



**Older Brothers or Sisters**



**Older Brothers or Sisters**



**Legal Guardians**

## Marital Status Responses on the FAFSA

---

Never Married

Unmarried and both parents living together

Married or Remarried

Divorced or Separated

Widowed

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When it comes time to select their response on the FAFSA, the student and his or her parents (if applicable) will be presented with the choices on the slide. Be sure to report the parent and student's marital status as of the day the FAFSA is completed.

## Divorced or Separated Parents

- Provide information for the parent(s) with whom the student lived with most during the 12 months prior to filing the FAFSA
- If the student spent equal time with both parents, use the information for the parent who provided the greatest amount of financial support for the student in the 12 months prior to filing the FAFSA
- If both parents are still living together, use information for both parents on FAFSA, even if the parents are separated, divorced or never married

## Remarried Parent

Provide information about the custodial parent **and stepparent** regardless of any:

- Agreement of “nonsupport”
- Prenuptial agreement
- Divorce decree designating tax filing exemptions

**Note:** A parent claiming the student on his or her tax return need not be the parent required to provide data on the FAFSA

**Note:** Children of parent and stepparent should be included in the household size and number in college questions on the FAFSA (if they currently provide and will continue to provide more than half of their support for the coming academic year)

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If the parent has remarried after being widowed or divorced, provide information for **the parent and stepparent**. A stepparent's children are counted on the FAFSA if the stepparent provides more than half their support, even if the children don't live with the stepparent.

## NO Parental Information



Do not provide parent information for

- **Foster parent(s)**
  - Student is automatically considered an independent student
- **Grandparents, other relatives, or guardian(s)**
  - Colleges may use professional judgment to allow the student to file as an independent student
  - **Exception:** Adoptive parents

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We want to reiterate that **foster parents** and **grandparents** or other **legal guardians** should not provide parental information **unless they have legally adopted the student.**

# Student Aid Report (SAR) and Acknowledgement

- Sent electronically or by mail
- Summarizes FAFSA information
- Displays **EFC** and **DRN**  
(upper right-hand area on the SAR)

**EFC** - Expected Family Contribution  
Used to determine eligibility for federal aid

**DRN** - Data Release Number  
Used to add additional schools

Federal Student Aid  
STUDENT AID REPORT  
2018-2019

HEP/FAFSA/JOY      OMB No. 1847-005

APR 22 2018      DATA RELEASE NUMBER (DRN) 8720

00000001      F 211 18 19      IMPRINTED FAMILY CONTRIBUTION (EFC) 10000.00

JOY, JOHN  
200 UNIVERSITY BOULEVARD  
SPRINGFIELD, OH 45502

Dear JOHN SMITH,  
Your Student Aid Report (SAR) summarizes the information you submitted on your 2018-2019 Free Application for Federal Student Aid (FAFSA).

Application Status Overview (see checked boxes)

Your FAFSA appears to be complete. Review the dates on page 3 of your SAR and make corrections or updates if necessary. The agency that processed your FAFSA will notify you of any changes.

Your FAFSA has been selected for verification. Verification is a process where your school confirms the data you reported on your FAFSA. You should not be selected for verification unless you have provided documentation that supports some of the information that you reported on your FAFSA.

Federal Student Aid Eligibility Overview (see checked boxes)

The data submitted on your FAFSA is used to calculate your Expected Family Contribution (EFC), which is 10000.00. The EFC is the amount of money that your family must provide. Remember, you should think of the EFC as an index that colleges use to determine how much financial aid you would receive if you were to attend that school. Financial aid may include grants (see loans that do not have to be repaid), work-study (part-time employment), and/or loan-based postsecondary loans that must be repaid. Remember that your EFC is subject to change if you update or correct your FAFSA.

Your financial resources (and also include other federal, state, or institutional grants and scholarships, and/or a work-study award). The amount of financial aid that you will receive will depend on the amount of financial aid you are eligible to receive. For more information about EFC, grants, loans, work-study, scholarships, and other resources of your institution, go to [www.fafsa.gov](http://www.fafsa.gov).

Based on your EFC, it appears that you may be eligible for a Federal Pell Grant of up to \$1000 (provided you have not yet received the maximum amount available for the Federal Pell Grant program). You may also be eligible for other grants, work-study opportunities, and loan-based student loans.

We will send information to other federal agencies to verify your eligibility for federal student aid. You may appear to be on loan with the information provided on your application. Review the checklist on page 3 for instructions on how to resolve these issues.

You should keep this SAR for your records!  
820600001 001      PAGE 1 OF 10      [Barcode]

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Once a student's FAFSA is processed, the student will receive notification of their **Student Aid Report (SAR)** – the output document from a processed FAFSA. A **Student Aid Report Acknowledgement** is sent electronically to students who supplied a valid email address on their FAFSA, or by mail for those who either supplied an invalid email address or no email address. The SAR summarizes the information the student and parents provided on their FAFSA.

The SAR will contain the student's official **Expected Family Contribution (EFC)**, which the college will use to determine federal financial aid eligibility.

And, the student again will see their **Data Release Number (DRN)**.

## FAFSA Demonstration Website

**fafsademo.test.ed.gov**

- **Username:** eddemo
- **Password:** fafsatest
- 2018-2019 test system available **September 24**

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The U.S. Department of Education has a test system for financial aid administrators and high school counselors. If you'd like to create a "dummy" FAFSA, check out the questions, see how the skip logic reacts to answers you input, or just look at the FAFSA of the Web webpages, check out the test site at **fafsademo.test.ed.gov**. The username to use is **eddemo**, and the password is **fafsatest**. The **2018-2019** test system will be available **September 24**. If you go into the system before September 24, you will find data relating to the **2017-2018** FAFSA on the Web, not the upcoming 2018-2019 FAFSA.

# Special Circumstances



California Community Colleges  
Student Financial Aid Administrators Association



ECMC



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## What are Special Circumstances?

**Some situations where a college may review and modify the student's eligibility for aid:**

- Income adjustments
- Circumstances affecting EFC
- Selective Service status
- Dependency status
- Unaccompanied homeless youths
- Foster youths
- Adverse home situations

Special circumstances are those scenarios you hear from your students when they can't figure out how to answer a question or questions on their FAFSA, or when they present living situations beyond the typical family. This can include situations where there is a significant change in income or assets for a student's parent, a question about Selective Service eligibility, a question as to the dependency status of the student, and other scenarios.

Financial Aid Administrators (FAAs) have the authority to make certain adjustments to the information presented on the FAFSA to help account for the unusual circumstances our students face. This authority falls under the general title of Professional Judgment when applied by the FAA.

## Professional Judgment

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- Authority given by Congress to FAAs under the HEA
- A decision to make a change to some aspect of student eligibility or cost of attendance that is NOT regulated by the USDE

Reviews of special circumstances utilize the Professional Judgment of the college's Financial Aid Administrator (FAA). This authority was granted by Congress through the Higher Education Act (HEA). It allows the FAA to make changes to data on a student's FAFSA, or change a student's cost of attendance, on a case-by case basis, based on special circumstances. The U.S. Department of Education gives the FAA leeway to account for such circumstances when these documented circumstances affect a student's aid eligibility.

Although there are many more possible areas where an FAA can exert his/her PJ beyond the examples on the previous slide, we want to focus on some of the more common scenarios you, as high school counselors, might see on a regular basis. After the scenarios, we can discuss other circumstances you have seen, and hopefully give you some insight into how best to counsel your students.

Some examples of other areas PJ can be applied: Selective Service status (for students who have changed their gender), loan eligibility, cost of attendance, private K-12 tuition, costs associated with a disability, medical expenses, one-time lump sum payments, child/dependent care expenses, and satisfactory academic progress standards.

## Scenario

---

Sandra's single mother was laid off from her job in July. Sandra's 2018-2019 FAFSA reflects income information from 2016, when her mother was still working.

- *What options does Sandra have?*
- *What can the Financial Aid Office do?*

As noted, Sandra and her mother were required to provide income and tax information from 2016 on the 2018-2019 FAFSA. And, although Sandra starts college in Fall 2018 at her local community college campus, she cannot update the FAFSA to include future income figures from 2017. But, considering the circumstances at hand, Sandra should be counseled to meet with her college Financial Aid Advisor regarding a review of her income information. Colleges may call their forms and processes different things, but Sandra's circumstances are quite common. As such, almost every college has a "Review of Income" or "Loss of Income" form and process. Using Professional Judgment as authorized by the U.S. Department of Education, a college Financial Aid Administrator may make changes to the figures used on the FAFSA, based on documented circumstances, and use the updated Expected Family Contribution (EFC) for determining aid eligibility for the student.

## Scenario

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Glenda, a continuing student at her local Cal State, has applied for financial aid. Her parents' income increased significantly in 2016, as her mom started working again to help with new expenses. As such, Glenda no longer qualifies for grant aid.

However, the student's brother was killed in an auto accident and the family is still paying for funeral expenses. And, her parents have huge medical bills due to her father's recent diagnosis with cancer. The student is concerned she may not be able to attend college this coming academic year.

- *How might you counsel Glenda?*
- *What can the Financial Aid Office do?*

In this scenario, Glenda should certainly talk to her college Financial Aid Advisor at her college. Although the family has seen a significant increase income from 2015 (from which the student received a good financial aid package for the past year) to 2016 (from which the student's coming school year's aid is based), actual PAID EXPENSES for the funeral and/or medical expenses for the father's cancer treatment may be considered in a Professional Judgment ("PJ") review. The student would be advised to bring in documentation of the paid expenses, along with written explanations of these circumstances.

Depending on whether the medical expenses are PAID or only BILLED could be a determining factor in a PJ review. Actual payments obviously affect the available income of the family to provide overall support for the family and for the student to attend college, so the Financial Aid Office staff will need to review the overall situation to determine if the expenses can be considered when recalculating Glenda's aid eligibility.

## Scenario

---

Harriet is under 24 years of age and lives with her grandparents, while her parents live in a different country. Should she list her grandparents' income on the FAFSA?

- *How might you advise Harriet?*
- *What can the Financial Aid Office do?*

Unless Harriet's grandparents have legally adopted her, the answer to the question in the scenario above is NO. Since Harriet is under 24 years of age, the student is a dependent for financial aid purposes. Therefore, she must provide parental information. If the parent(s) are working in a foreign country, currency amounts need to be converted to dollars for calculating income, taxes, and asset values. The parent(s) will need to print the signature page, sign, and mail to the FAFSA Processor, UNLESS one of the parents is eligible to obtain an FSA ID. The FAFSA "save key" will help facilitate completion of the FAFSA by parents who live outside the U.S.

But, what if there are other circumstances to Harriet's situation? For example, what if the student hasn't had contact with the parents for a few years, and there were tensions when last they all lived together as a family? What if the student cannot find or contact the parents? In circumstances like these, the Financial Aid Administrator may be able to override the student's dependency status, assuming appropriate and corroborating documentation can be provided. But, even with a review of circumstances like these, the Financial Aid Office would not require income information from the grandparents. However, if the grandparents pay for some of the student's expenses, this *cash support* is reported as untaxed income to the student on the student's FAFSA.

If the student's grandparents are legal guardians to the student, as ordered by a court in the student's state of residence, then the student is considered independent. A legal guardianship established by an attorney is not enough for the student to be considered independent.

Lastly, if the grandparents had legally adopted the student, then we would use their income on the FAFSA. But, this is probably a rare instance.

## Scenario

Flora had a baby in her senior year of high school. She lives with her boyfriend (the father of her baby) and his parents. She is unemployed, but her boyfriend just got a job. They are both applying for financial aid.

- *Who can claim the baby as their dependent (on the FAFSA)?*
- *How might you counsel Flora?*
- *What type of documentation would the Financial Aid Office request?*

Flora, if she is providing more than 50% of her baby's support, can consider her baby as her dependent when completing her FAFSA. As such, Flora would be an independent student for financial aid purposes. Cash support received from the boyfriend and government benefit programs can be considered when trying to meet the "more than 50%" threshold. So long as the support is coming from sources other than Flora's parents, Flora can count it as part of her support of her baby.

Flora's boyfriend could, possibly, also consider the baby as his dependent when completing his FAFSA. This will depend upon how much support he is providing for the child.

The Financial Aid Office would probably need to know more than what's presented above. For example, is the student or boyfriend receiving any government support? Is there any cash aid or in-kind support being received from family or friends?

The best counsel would be to have Flora and her boyfriend meet with their college Financial Aid Advisor to make sure the Financial Aid Office has a full understanding of the circumstances surrounding the support for the baby of the student. Considering the Student Aid Reports for Flora and her boyfriend may appear unusual (after all, both SARs may indicate household sizes of two, with low or now income), as long as the Financial Aid Office understands the reality of the support and living circumstances, both students might be processed correctly for the financial aid programs for which they are eligible.

## Scenario

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Juan has been living in Oakland with his aunt for the last two years while finishing high school. His parents moved back to Mexico with his three sisters. He reported his aunt's income on the FAFSA, with a family size of two.

Juan's father recently moved back to the Bay Area and is working.

- *Did Juan complete his FAFSA correctly?*
- *If not, whose income should be reported?*
- *What should the household size be?*
- *How might you counsel Juan?*
- *What can the Financial Aid Office do?*

The easiest answer to any of the questions above is for the first question. Unless Juan's aunt legally adopted him, he should not have used her income on his FAFSA. As for whose income to report, assuming Juan is a dependent for financial aid based on all of the other federal criteria, he would need to supply financial and household information for him and his parents. Even if Juan is not living with his father, he would use his parents' income information. We may need to figure out the current marital status for Juan's parents in order to calculate the size of the household.

Although Juan may not need or deserve a PJ review, his college Financial Aid Advisor should review his application, help him make corrections as needed, and counsel Juan on any issues that involve the collection of the correct information for his FAFSA.

## Scenario

---

Davis has been couch surfing for the past year, staying with friends and family members. His single dad has been in and out of jail, but when he's out he stays with Davis. Mom has been out of the family picture since Davis was three, and he doesn't know her whereabouts.

- *How might you counsel Davis?*
- *What can the Financial Aid Office do?*

Davis may not meet the Unaccompanied Homeless Youth criteria on the FAFSA where he could obtain documentation from a homeless or runaway shelter, but with his circumstances he should certainly meet with his college Financial Aid Advisor for assistance. Depending upon a number of factors, the college Financial Aid Administrator could confirm his homeless status. At a minimum, a personal interview or meeting with the Financial Aid Administrator will probably be required, as they need to determine if the student, by preponderance of available information, meets the intent of the criteria for unaccompanied homeless youth.

# Reference Materials



California Community Colleges  
Student Financial Aid Administrators Association



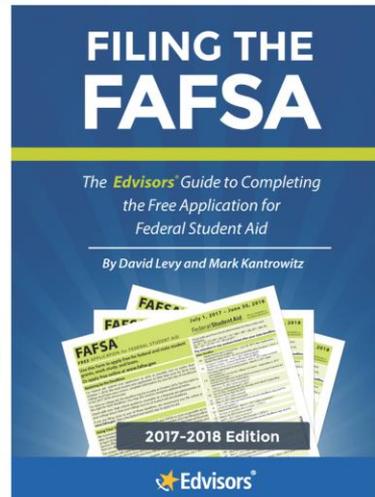
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## Must-Have, Comprehensive Resource

- Increase eligibility for student aid
- Avoid common errors
- Complete the FAFSA quickly, easily and accurately
- **Free** download at: [advisors.com/fafsa-book](https://advisors.com/fafsa-book)



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Now, whether for you or your students, there's a great resource available to help with the deep details of the FAFSA.

An **Excellence in Financial Literacy Education (EIFLE)** Award winner and **Amazon.com** bestseller, *Filing the FAFSA* is a handy book published by Edvisors and co-authored by David Levy and Mark Kantrowitz. Mark is the go-to financial aid expert, having started the general financial aid website **finaid.org** and **fastweb.com** many years ago, and current publisher of **Cappex.com**. David Levy, former Financial Aid Director at Caltech and current member of the CASFAA High School Relations Committee (the same people co-sponsoring today's High School Counselors Workshop), has been instrumental in editing both this presentation today and in creating the book *Filing the FAFSA*.

The free book brings you:

- A step-by-step guide to the FAFSA,
- A guide to increasing eligibility for student aid,
- Help in how to avoid common errors, and
- Assurance your students and parents can complete the form quickly, easily and accurately.

## Reference Materials

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[www.csac.ca.gov/  
doc.asp?id=1438](http://www.csac.ca.gov/doc.asp?id=1438)

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We will continually post new items we think you'd like to see and use, on the CSAC webpage for high school counselors. This PowerPoint will be posted to the website along with the Reference Items included in the book, and more.

# Questions?



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## Questions?

Don't forget – You can find all kinds of reference items, resources, weblinks, and more at the CSAC webpage, noted on the previous slide.