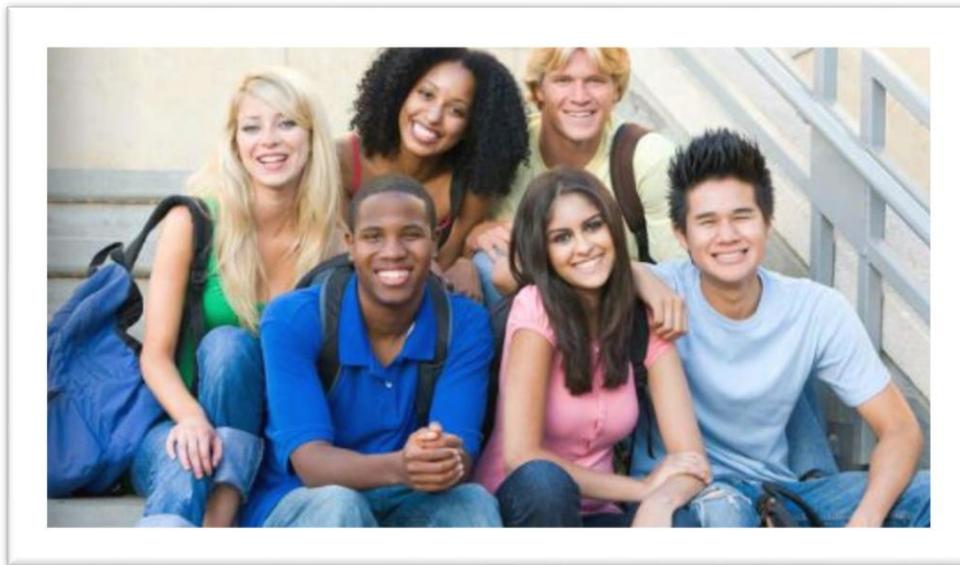


2015 California High School Counselors Workshop Guide

FOR THE 2016-17 FINANCIAL AID YEAR



This workshop series is conducted by the California Association of Student Financial Aid Administrators (CASFAA) and the California Student Aid Commission (CSAC). Visit www.csac.ca.gov or www.casfaa.org for online versions of this packet.

October 2015



Dear High School Counselor,

Welcome to the annual Fall High School Counselors workshop series, a partnership effort of the California Association of Student Financial Aid Administrators (CASFAA) and the California Student Aid Commission (Commission). CASFAA is an all-volunteer organization of California college and university financial aid administrators, and the California Student Aid Commission is the principal state agency that administers Cal Grant and other federal and state-funded financial aid, and is the processor of the California Dream Act Application.

Our 2015 High School Counselors Workshop series consists of 21 half-day workshops offered between October 14, 2015 and November 20, 2015. Many counselors, advisors, and staff from California high schools have registered to take part in this annual workshop.

CASFAA provides training on federal and state financial aid applications 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 Educational Credit Management Corporation (ECMC) to offer training to high school counselors and staff.

Our workshop will inform you of new FAFSA and Cal Grant changes and Dream Application updates. You will also learn about the Middle Class Scholarship and the many resources available to assist you in helping your students.

This packet contains the slide presentation offered at today's workshop and a web resource list 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 hard work you do for students. We look forward to an informative and fun workshop series.

Sincerely,

Catalina Mistler, Chief of Program
Administration and Services Division
California Student Aid Commission

Anafe Robinson, Co-Chair
CASFAA High School Relations

Dennis Schroeder, Co-Chair
CASFAA High School Relations

Agenda

8:00 am – 8:30 am	On-site check-in/Welcome
8:30 am – 9:00 am	Cal Grant and Q & A
9:00 am – 9:10 am	Break
9:10 am – 9:40 am	Middle Class Scholarship Program and Q&A
9:40 am – 9:50 am	Break
9:50 am – 10:35 am	Resources & Dream Act Application and Q&A
10:35 am - 10:45 pm	Break
10:45 am – 11:45 pm	Federal & FAFSA updates
11:45 pm - 12:00 pm	Q & A and Wrap-up
12:00 pm	END

California Student Aid Commission

2015 CASFAA/CSAC High School Counselors Workshops

*Presented by the
California Student Aid
Commission*



Agenda

- Cal Grant
- Middle Class Scholarship
- Resources
- California Dream Act
- FAFSA

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Important Changes for 2016/2017

- **Dream Act Application**
 - Male students can register for Selective Service through the Dream Application
- **Cal Grant B**
 - Access Award: \$1,656
 - CCC Augmentation
- **Cal Grant C**
 - Priority points criteria updated
- **GPA Submission**
 - Ting Bill mandates all seniors' GPAs must be submitted electronically
 - Opt-out option must be given to students/parents no later than October 15th each year

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FAFSA Changes for 2017/2018

Starting 2017/18

- File FAFSA earlier beginning October 1st, 2016
- FAFSA will use "prior-prior-year data"

CSAC

- Preparing for changes to programs
- Created a workgroup involving different representatives

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Partnering With You

- Coordinate an annual High School Counselor Conference Training
- High School Counselor Advisory Committee
- Establish more workgroups to partner together



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Commission Programs

- Cal Grant
- Middle Class Scholarship
- Chafee Grant
- Child Development Grant
- CA National Guard EAAP
- Law Enforcement Personnel Dependents Grant

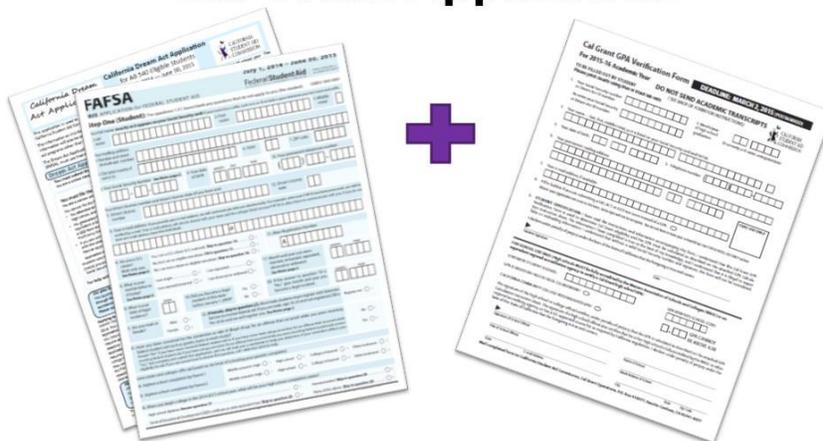


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Cal Grant Application



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Cal Grant Application

FAFSA/Dream App

- *Student must list an Eligible Cal Grant school
- Must complete the FAFSA or Dream App for year they are applying

GPA Verification

- With or without Social Security Number
- Electronic submission for public high schools and charter schools

*Eligible Schools List is accessed at the bottom of the CSAC Website

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Cal Grant Eligible Schools

2015-16 Eligible and Ineligible Cal Grant Schools

On November 1, 2014, the California Student Aid Commission certified the U.S. Department of Education's 2011 3-year cohort default rates and 2012 graduation rates applicable to Cal Grant participating schools for the 2015-16 academic year.

- To see a list of all **eligible** Cal Grant schools for the 2015-16 academic year, [click here](#)
- To see a list of all **ineligible** Cal Grant schools for the 2015-16 academic year, [click here](#)

Cal Grant Eligible Institution Search

- To find an eligible Cal Grant School please enter in any or all of the following information and Click Go
- If you do not enter the school name exactly as it is worded in the program, it may not show in the results field. As an alternative to locate your desired school, try a search only by the city where the school is located and look for the school in the results field.
- Leaving selection criteria blank will return all eligible Cal Grant schools.
- Students who receive a Cal Grant A award, and choose to attend a California Community College or change school to a California Community College, will have their awards reserved [R] for up to three years. Cal Grant A payment is made only after they transfer to a four year tuition/fee charging college.

Acad Year: 2015 - 2016 School Name: _____ City: _____
 Segment: ALL Segments

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Basic Eligibility Requirements

Federal Requirements and Additional Cal Grant Requirements

*U.S. Citizen, Eligible Non-Citizen	Not Earned a Bachelor's Degree	*California Resident
Meets Selective Service	Not Incarcerated	Attend Eligible California College
*Social Security Number	Not in Default on Student Loan	Enrolled at Least Half-Time
Maintain Satisfactory Academic Progress		High School GPA

*** These requirements are supplanted by other eligibility criteria for AB 540 students**

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Income and Asset Ceilings

FOR NEW CAL GRANT APPLICANTS
and
RENEWING CAL GRANT RECIPIENTS

2016-17 CAL GRANT PROGRAM INCOME CEILINGS		
	Cal Grant A and C	Cal Grant B
Dependent students and Independent students with dependents other than a spouse		
<i>Family size:</i>		
Six or more	\$104,600	\$57,500
Five	\$97,000	\$53,200
Four	\$90,500	\$47,600
Three	\$83,300	\$42,800
Two	\$81,300	\$38,000
Independent students		
Single, no dependents	\$33,200	\$33,200
Married, no other dependents	\$38,000	\$38,000
2016-17 CAL GRANT PROGRAM ASSET CEILINGS		
Dependent students ¹	\$70,000	
Independent students	\$33,300	

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Financial Need Requirement

Financial Need Calculation:

$$\frac{\text{Cost of Attendance (COA)} - \text{Expected Family Contribution}}{\text{Unmet Financial Need}}$$

Cal Grant A

Must have a minimum financial need of at least the maximum Cal Grant A award amount +\$1,500

Cal Grant B

Must have a minimum financial need of at least \$700

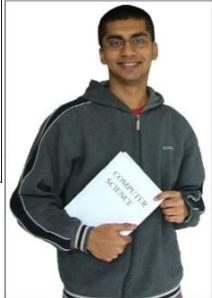
Cal Grant C

Must have a minimum financial need of at least the maximum Cal Grant C award amount +\$1,500

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Cal Grant Types

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	Transfer Entitlement		Cal Grant C
High School Entitlement		Competitive	
			

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Cal Grant A

- Low to middle income students who:
 - 3.00 High School GPA minimum
 - Have financial need
 - Meet the income and asset requirements
 - Associates or Bachelors programs only

CSU	UC	Independent*	For Profit^
\$ 5,472/yr	\$ 12,240/yr	\$ 9,084/yr	\$4,000/yr

* Private non-profit institutions and WASC accredited for-profit institutions
 ^ Non-WASC accredited for-profit institutions

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Cal Grant B

- Low income students who:
 - Meet the income and asset requirements
 - Have financial need
 - 2.00 GPA minimum
 - Associates, Bachelors, and Certificate programs
- Annual Awards
 - \$1,656 stipend first year
 - Tuition/Fees plus \$1,656 in 2nd, 3rd, 4th year
- CCC Access Award Augmentation
 - Students with 12 units or more may qualify
 - Amount varies upon the number of qualifying students

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Cal Grant C

- Low and middle income students who:
 - Meet the income and asset requirements
 - Have financial need
 - Enroll in vocational courses of study
 - Associates and Certificate programs only
 - Must complete C Supplement Form
- Annual Awards
 - Used for school expenses including tuition and fees \$547 to \$2,462

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Cal Grant C

- Two of the following must be met:
 - High employer need or demand
 - High employment growth or industry cluster
 - High employment salary and wage projections
 - Economic security
- Special consideration to long-term unemployed

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Most Beneficial Grant Applied

- Can only receive one Cal Grant
- Considered for all awards applicable
- Awarded most beneficial award



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Student Notifications

- Award indicates Cal Grant eligibility
 - Sent as early as February
 - Letter notification will be sent if no email address
- Mark these email addresses as safe:
 - calgrantoffice@csac.ca.gov
 - studentsupport@csac.ca.gov



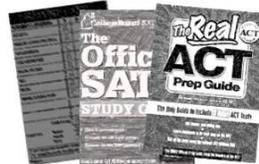
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GPA and Academic Qualifier Submission

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Academic Qualifier Types

- High school GPA
- Test Scores – SAT (Reasoning Test), ACT, GED, HiSet, TASC, allowed if:
 - student does not have a GPA
 - has coursework that can't be converted to a 4.00 maximum GPA
 - attended a non-accredited high school



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California High School Exit Exam (CAHSEE)

- July 2015: CAHSEE exam canceled
- Senate Bill 725: Exempts class of 2015 from CAHSEE
- Senate Bill 172: Would suspend CAHSEE for 3 years



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Assembly Bill 2160

- Requires public high school/charter schools to:
 - Electronically upload GPAs
 - Create opt-out process
 - Provide opt-out by October 15th
- Important Steps
 - Establish a WebGrants account
 - Check WebGrants account status
 - Refer to the WebGrants User Guides & Trainings

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Cal Grant GPA Calculation

Current High School Seniors

- High School GPA calculation– **sophomore** and **junior** grades only!
- Remember to exclude P.E, R.O.T.C, and Remedial

Last Year's High School Graduates

- High School GPA calculation– **sophomore**, **junior**, and **senior** grades
- Remember to exclude P.E, R.O.T.C, and Remedial

http://www.csac.ca.gov/pubs/forms/grnt_frm/gpa_calculation_instructions.pdf

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Ways to Submit GPAs

- By using WebGrants
 - **SSN**
 - **Non-SSN**



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Non-SSN GPA Submission

Matching of GPAs to FAFSAs is done using other application elements - *up to 20 elements*

- Name, Address, Phone, DOB, email, SSID etc...

This is necessary since dreamers may not have an SSN



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Corrections

- Address letter (on school letterhead) to Cal Grant Operations
- List incorrect information and correct information
- List your contact information in case we need clarification
- Mail to:

CSAC
Cal Grant Operations
P.O. Box 419077
Rancho Cordova, CA 95741



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GPA-Best Practices

- **Don't Wait!** (GPAs can be uploaded right now)
- File layout & User Guide available under "Help" in WebGrants
- Checkout on-demand resources
- Utilize WebGrants reports
- Contact Institutional Support



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WebGrants for Schools

- WebGrants Home Page <https://webgrants.csac.ca.gov>
- www.csac.ca.gov Look for “WebGrants” in the “High Schools” tab
- Download WebGrants Access Request forms
- CSAC Technology Help Desk (888) 294-0148 or csachelpdesk@csac.ca.gov



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High School GPA Reports

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WebGrants GPA Reports

Non-SSN GPA Upload Report	Upload Confirmation with Total Record Count
Non-SSN GPA Roster Report	Summary of Non-SSN GPA Records Submitted
Non-SSN GPA Status Report	Displays Student's Statuses after the Non-SSN GPA has been received
Non-SSN GPA Unmatched Report	Displays Non-SSN GPA Student Records that have not been Matched to FA Application
Student Summary Report	Displays Student Statuses -includes SSN GPAs and Matched Non-SSN GPAs
Financial Aid Application (No GPA) Report	Displays list of Students who have Submitted a Financial Aid application but no GPA
Your Cal Grant Awardees Report	Displays Students that have been offered a Cal Grant Award

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Non-SSN Edit or Matching



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High School Graduation Verification

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HS Graduation Verification

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

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WebGrants for Students (WGS)

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WWW.WEBGRANTS4STUDENTS.ORG



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Common Errors in Creating WGS Accounts

- Name mismatch
- Application has not been submitted
- Compatibility issues
- Mobile devices



California Student Aid Commission

WGS – Requirement Section

Requirements Section - High School Graduation Confirmation (GB)



Your Cal Grant award has requirements that must be satisfied before final award eligibility can be determined and the awarding process completed. **You may not be able to select any options on the Cal Grant Main Menu below until this requirement is satisfied.**

You are not eligible to receive Entitlement Cal Grant benefits if you have not graduated from high school or achieved the equivalent. However, state law gives Entitlement Cal Grant applicants until December 31 of the award year to complete their high school graduation requirements.

- If you have not yet graduated, but expect to graduate prior to December 31 of the award year, please complete the confirmation at that time. Confirmation of your high school graduation is required.
- If you have not graduated, or achieved the equivalent, by December 31 of the award year, your Cal Grant offer is void. To be considered for a Cal Grant award you will have to reapply next year by the March 2nd application deadline.

Submit High School Graduation Confirmation

Please note that you will not be paid unless you are confirmed.

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California Student Aid Commission

WGS – California High School Graduation Confirmation

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, 2015, please do not complete the information below at this time. You have until December 31, 2015, 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, 2015, 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: **MAY, 2015** 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.

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California Student Aid Commission

WGS – California Aid Report (CAR)

California Aid Report (CAR)

Congratulations on meeting the preliminary requirements for the 2014-2015 Cal Grant Program! Based on the information you reported on your Free Application for Federal Student Aid (FAFSA) or CA Dream Aid Application (CADAA) and Grade Point Average (GPA), the California Student Aid Commission (CSAC) is offering you a Cal Grant. To receive your Cal Grant award offer beginning in the fall 2014, you will need to take some of the steps identified below. **This Cal Grant award offer may be reduced or withdrawn based on the final State Budget or final eligibility determined by your campus.**

Date Issued: 07/03/14 **CSAC ID:**

School Choice	Cal Grant A	Cal Grant B
LOYOLA MARYMOUNT UNIVERSITY	SEE CODE #99	\$1,548
UNIV OF CA - IRVINE	SEE CODE #99	\$1,548
CSU FORTY-NINE POLYTECHNIC	SEE CODE #99	\$1,548

[Code Descriptions](#)
[New Recipient Change Form](#)

Some schools you listed on your FAFSA/CADAA may not participate in the Cal Grant Program. To view the list of eligible schools, please visit the CSAC homepage at www.csac.ca.gov, click Colleges, and then "Cal Grant Eligible Schools" located at the bottom of the page.

To Receive the Cal Grant award you must:

- Confirm that the first school listed above is the one you plan on attending. If it is not, you must submit a school change in your WGS account so that we can get the award to the campus you will attend beginning in the fall 2014.
- Understand your financial aid disbursement options. These may include a paper check, debit card or direct deposit to your bank account. You have a choice as to how you want your Cal Grant funds paid to you so make sure you make a wise decision to get the most out of your Cal Grant award offer and other financial aid. Check your campus student account or contact your financial aid office for Cal Grant disbursement data.
- Register with the Selective Service if you are a male living in the U.S. and are between the ages of 18 through 25. For more information about Selective Service requirements go to www.sss.gov.
- Use this award offer during this academic year or your award offer may be withdrawn. Let us know if you do not plan to use the award for the 2014-2015 academic year.

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

Diana Fuentes-Michel, Executive Director
California Student Aid Commission

If you have any questions, please contact us at (888) 224-7268 or e-mail us at studentupport@csac.ca.gov.

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California Student Aid Commission

Middle Class Scholarship



MCS Recap

- Awarded 85,394 students
 - 16,224 at UC
 - 69,170 at CSU
- Maximum Award Amounts in 2014/15
 - \$1,710 at UC
 - \$768 at CSU



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What to Expect

- 2015/16 Maximum Award Amounts
 - \$2,448 at UC
 - \$1,092 at CSU
- Eligibility Changes
 - 2016/17 Income and asset ceiling adjusted annually CPI
 - Lifetime cap on award based Education Level



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Middle Class Scholarship

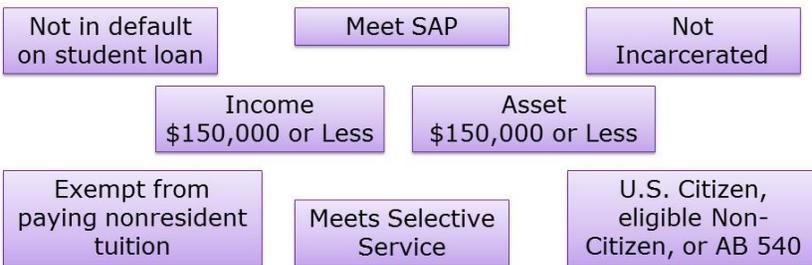


- Submit FAFSA/Dream Act application by March 2 deadline
- Students must apply every year

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Middle Class Scholarship Who's Eligible?

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



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Middle Class Scholarship

Enrollment Requirements

- Must enroll in a CSU/UC
- Must be at least ½ time
- 1st Undergraduate program
- Benefits extend to Teaching Credential Program
- Maintain SAP



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MCS Award Amounts

- Final award based on students eligibility & funding allocated
- Eligibility determined after students awarded federal, state and institutional aid



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Middle Class Scholarship

The following scholarship offer is based on the information from your Free Application for Federal Student Aid (FAFSA) or California Dream Application (CADA) and your pertinent financial aid as reported by your school.

*2015/16 Scholarship Amount School on File
 \$192 CSU BAKERSFIELD

*Your Middle Class Scholarship amount may be adjusted or withdrawn based on revised information provided by your school.

Important Middle Class Scholarship Information

- ✓ If you are not attending the school listed above, you must contact the financial aid office of the CSU or UC campus you are attending to inform them of your potential MCS eligibility.
- ✓ Complete all financial aid requirements with your financial aid office.
- ✓ Schools disburse the funds to their students based on their disbursement schedules.

To check the status of your MCS award, go to the WebGrants for Students (WGS) website located at www.webgrants4students.org. On WGS, you should create an account by clicking the link that says "Create an Account" or log into your existing account. Make sure to visit WGS periodically to obtain important program and contact information. For more information about the Middle Class Scholarship, go to <http://www.csac.ca.gov/>

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WGS – MCS Award Detail

Middle Class Scholarship Award Detail

- Click on Withdraw Reason title to display descriptions.
- Click on Award Status title to display description.
- Click on the School of Attendance on File to display description.

Search: SSN: [] Academic Year: 2015-2016

E-Mail: [] School E-Mail: [] SSN/DREAM ID: [] CSAC ID: [] Date of Birth: [] Home Phone: [] Cell Phone: []

Annual Award Amount	Fall	Winter	Spring	Award Date	Award Status	Withdraw Reason
\$1,082	\$348	\$0	\$348	08/07/2015	AWARDED	

Total Income Reported: \$47,177

Other Financial Aid Reported by Your School of Attendance: [] School of Attendance on File: []
 Federal Aid: \$0 Name: CSU SACRAMENTO
 State Aid: \$0 School Code: 01110000
 Institutional Aid: \$0

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California Student Aid Commission

Resources



Scholarships References

- XI. **Fastweb** – Online resource for finding scholarships to help pay for school. Access to online resources to download and print. <http://www.fastweb.com>

Special Circumstances & Populations References

- XII. **Scholarships for Military Families** <https://studentaid.ed.gov/sa/files/default/files/scholarships-for-military.pdf>
- XIII. **Unaccompanied Youth Toolkit for High School Counselors and McKinney-Vento Liaisons** <http://www.naefcy.org/toolkit-high-school-counselors>

Other Information References

- XIV. **The Selective Service System** www.sss.gov
- XV. **Tax Benefits for Education: Information Center** <http://www.irs.gov/ust/tax-benefits-for-education-information-center>
- XVI. **CSS/Financial Aid PROFILE – Student Guide** https://professionals.collegeboard.com/profdownload/PROFILE_Student_Guide.pdf
- XVII. **NASFAA Guide to Planning and Conducting a Financial Aid Night** http://www.nasfaa.org/entrancePDF.aspx?id=3341&ekfmen_noscript=1&ekfmenesec=ct04f177_6_341
- XVIII. **Student Aid and Identity Theft** <https://www2.ed.gov/about/offices/list/oip/misused/idtheft.pdf>
- XIX. **College Fee Waiver for Veteran Dependents** <https://www.cabvt.ca.gov/VetServices/Pages/College-Fee-Waiver.aspx>
- XX. **Financial Aid Consultants and Scholarship Search Services** <http://www.nasfaa.org/entrancePDF.aspx?id=5236>

On Demand Modules

The screenshot shows the California Student Aid Commission website with a navigation menu and a list of on-demand training modules. The modules are categorized into four groups: New to Financial Aid, Middle Class Scholarship, Cal Grant, and WebGrants. Each module has a list of topics and a 'Click to Access Full Webinars & Handouts' button.

- New to Financial Aid**
 - Front Desk 101- Coming Soon! Please check back.
- Middle Class Scholarship**
 - Middle Class Scholarship
 - MCS Awards
 - MCS: Fee Types
 - MCS: File Submission Process
 - MCS: Reports
- Cal Grant**
 - Cal Grant Basics
 - Cal Grant Eligibility
 - Cal Grant A, B, C, Cs
 - Cal Grant GSA Calculations
 - Individual SGN GSA Submission Process
 - SGN GSA Batch Upload
 - Individual Non-SSN GSA Submission Process
 - Creating a NON-SSN GSA Test File for Batch Upload
 - Uploading a NON-SSN GSA Test File
 - NON-SSN GSA Matching Process
 - NON-SSN GSA: Edt Process
 - High School GSA Reports
 - Cal Grant Payment Reporting
- WebGrants**
 - Establishing and Accessing WebGrants
 - WebGrants Help Menu
 - WebGrants Tools
 - Student Information Screens in WebGrants
 - Customizing Your Router
 - Grant Record Changes (9-21)
 - CA Dream Act Screens in WebGrants
 - WebGrants Reports (Colleges)
 - Cal Grant Reconciliation Reports
 - WebGrants for Students
 - California License Exam Reporting
 - SB 70 Data Reporting

California Student Aid Commission

Webinars

The Commission is currently updating its online full-length webinar library. In the meantime, you can register for a **live session** or access our **Mini Trainings** by selecting the yellow button to the right of this page. Each module is approximately ten minutes in length and cover a variety of specific topics surrounding Cal Grant, Middle Class Scholarship, California Dream Act, WebGrants and more.

**Coming Soon!... Please check back later.*

- Cal Grant**
 - *Your School and the CA Student Aid Commission Presentation PDF
 - *Cal Grant 101 Presentation PDF
 - *Cal Grant Payment Process Presentation PDF
 - *WebGrants Reports and Tools Presentation PDF
 - *Using the WebGrants System Presentation PDF
 - *Customizing Your Roster Presentation PDF
 - *Cal Grant Reconciliation Presentation PDF
- Specialized Programs**
 - Child Development Grant Program PDF
 - CND EAP Program PDF
 - *California Chafee Grant Program
 - California Chafee Grant Program PDF
 - APLE PDF
- Cal Grant GPA Submission**
 - *GPA Submission - SSN
- Reporting and Audits**
 - *What to Expect From a Cal Grant Review

[Click to Access Mini Trainings](#)

California Student Aid Commission

Commission Notifications

OPERATIONS MEMO
Update from the California Student Aid Commission
GOM 2014-22
July 11, 2014
TO: Financial Aid Administrators
HIGH School Counselors
FROM: Catalina G. Heider, Chief, Program Administration & Services Division
SUBJECT: 2014-15 Cal Grant Award Amounts and Dream Act Renewals Eligible to File a FAFSA
This Operations Memo from the California Student Aid Commission (Commission) provides an update on the award amount changes as prescribed in the 2014-15 Budget Act and provides guidance regarding the 2014-15 renewal of Cal Grant Dreamers eligible to complete a Free Application for Federal Student Aid (FAFSA).
2014-15 Cal Grant Award Amounts

SPECIAL ALERT
Update from the California Student Aid Commission
June 30, 2014
TO: Financial Aid Administrators
FROM: Catalina G. Heider, Chief, Program Administration & Services Division
SUBJECT: Annual Renewal of WebGrants Access Forms
This Special Alert from the California Student Aid Commission (Commission) reminds institutions of the annual requirement to submit:
• WebGrants Information Security and Confidentiality Agreement (Confidentiality Agreement) and
• WebGrants System Administrator's Access Request Form (Access Request Form) to continue access to WebGrants.
The deadline to submit WebGrants access forms is July 31, 2014.

Watch important **Commission Meetings** at www.csac.ca.gov
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California Student Aid Commission

Social Media

Follow the Commission on social media – Click on the Icon using www.csac.ca.gov

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

Follow us on Twitter @castudentaid #CalGrants

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CASH FOR COLLEGE

Provides line-by-line help on the FAFSA, CA Dream Act & Chafee Applications. Workshops offer computers so students can apply on the spot.

- Jan – Mar 2. Open to all students and parents. Focus on low-income and first-generations.
- For Workshop Registration & Materials email Cash for College.
- Facebook: CashforCollegeCalifornia
- Twitter: @cash4collegeca
- Email: cashforcollege@csac.ca.gov



California Student Opportunity and Access Program

14 Regional Consortia Serving 126 School Districts

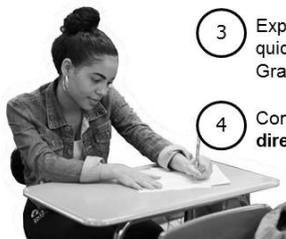
- Central Coast
- Central Valley
- East Bay
- Long Beach
- Merced
- North Coast
- Sacramento
- San Diego and Imperial
- San Francisco
- San Jose
- Santa Barbara
- Solano
- South County Gilroy
- South San Joaquin

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THE 2015-16 GET SCHOOLED COLLEGE CAMPAIGN WILL SUPPORT STUDENT SUCCESS



- 1 Work with up to 100 high schools to improve FAFSA completion rates and college readiness rates.
- 2 In partnership with Univision, continue to enhance Spanish language content and promotion of college planning resources.
- 3 Expand our texting hotline to enable more students to access quick answers to questions about college applications, Cal Grants and other forms of financial aid.
- 4 Continue to build our library of California specific directories, tools and resources.



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Commission Communications

- Fund Your Future Magazine
<http://www.fundyourfuture.org>



California Student Aid Commission



Dream Act Eligibility

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Who is the California Dream Act Application for?

- **AB 540 requirements:**

- CA HS 3 years or equivalent credit
- Graduate CA HS or equivalent
- Attend qualifying CA college
- Complete affidavit (if applicable)



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Deferred Action for Childhood Arrivals (DACA)

- Protects young undocumented applicants from deportation
- Issues SSN cards valid for work only
- Has specific program criteria applicants must meet



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Selective Service

Males 18 to 25 must register with Selective Service for Cal Grant and other state aid:

- Do not need a SSN to register
- **BEST WAY TO REGISTER:** Answer "Register me" on CA Dream Act question 23a
- **OR:** Get registration form at U.S. Post office, or download at Caldreamact.org
- Students will receive a Confirmation by mail from the Selective Service



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Taxes

- Students and parents residing in the United States must file US tax returns, if earning threshold is met
 - May be required by college/university if selected for verification

http://www.irs.gov/publications/p501/ar02.html#en_US_2014_publink1000270109

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California Dream Act Application

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CA Dream Act Enhancements

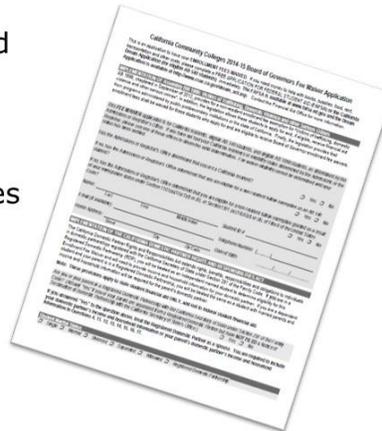
- Adjusted landing page layout
- Improved resources page
- Clarified determination logic questions
- Revised help text in application



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Aid Under California Dream Act

- Commission Administered Aid
- Private scholarships administered by campuses
- Institutional Aid



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WWW.CALDREAMACT.ORG

CA DREAM ACT
Apply by March 2, 2015

Questions about types of CA Dream Act financial aid?
 • Wondering if you are a CA Dreamer?
 • AB 540 eligible?
 • Do you need to submit a GPA?

Announcements:
 • To apply for a Cal Grant, the 2015-16 Dream Act Application is due by Monday, March 2, 2015.
 • Due to scheduled site maintenance, the on-line 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 California Dream Act Application
 Select this option if you:
 • Have never filed a California Dream Application
 • Want to start a new California Dream Application
 • Are ready to get started

Provide a Parent Signature
 Select this option if you:
 • Need to request Parent PIN
 • Forgot your Parent PIN
 • Need to sign your child's application

California Dream Act Application Login
 Select this option if you want to:
 • Continue or renew your CA Dream Application
 • Update or correct current CA Dream Application
 • View your Student Aid Report (SAR) and more...

Start Dream Application | Sign Student Application | Login to Application

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2016-17 Dream Application

STUDENT

Welcome!

Completion of the Dream Act Application is required to determine financial aid for California AB540 eligible students. Your application will be processed by the California Student Aid Commission.

The following questions will determine whether this is the best financial aid application for you or whether you should fill out the Federal Application for Federal Student Aid (FAFSA).

[Continue](#)

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California Student Aid Commission

2016-17 Dream Application

Are you a US Citizen (US National) or eligible non-citizen? (see below to check status) Yes No

[Continue](#)

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Generally, you are an eligible noncitizen if:

1. Permanent US resident with a permanent resident card (I-551)
2. Conditional permanent resident with a conditional green card (I-551c)
3. Holder of an Arrival-Departure Record (I-94) from the Department of Homeland Security with the following designations:
 - o Refugee
 - o Asylum Granted
 - o Cuban-Haitian Entrant, Status Pending
 - o Victim of human trafficking, T-visa holder (T-2, T-3, or T-4, etc.)

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2016-17 Dream Application

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Based on the responses you provided, you **are** eligible to file the California Dream Act Application and should **not have** filed the FAFSA.

However, since you have already filed a **2015-16 year FAFSA**, you should press the Green Button below to **complete** the Dream Act Application but you **must also** do the following:

1. Send an **email** to studentsupport@csac.ca.gov stating:
 - a. You have **already** filed the 2015-16 FAFSA
 - b. You should have filed the Dream Application
 - c. Include your full-name as it is on the FAFSA, your mailing address and Date of Birth
2. Complete the Dream Act Application as soon as possible
3. Tell the college you will be attending that you filed both the FAFSA and the **Dream Act Application**
4. If it is before the **March 2nd deadline**, file a Cal Grant GPA

[Start a Dream Application](#)

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2016-17 Dream Application

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Welcome Test Case!

Which academic year application would you like to retrieve?

If you filed a Dream Application for 2015 - 2016 and want to Renew click on the academic year 2016 - 2017 button...

You may choose to retrieve your Dream Act Application by the academic school year to either view or to make corrections.

[2016 - 2017 School Year](#)
(July 1, 2016 - June 30, 2017)

[2015 - 2016 School Year](#)
(July 1, 2015 - June 30, 2016)

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2016-17 Dream Application

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Welcome *Finest Student* | Logout

Dream Application

Instructions | Student | Dependency | Parent | Signature | Confirmation | CalSAR

Welcome to your California Dream Act Application! Read these 9 tips first:

1. Questions with a star (*) require an answer.
2. Clicking the **Save** button will add time to the running clock and give you as much time as you need to complete your application. You can also save your application and return to it another time.
3. The **red text** throughout the Dream Act Application means "further action is required from you."
4. Based on your answers to questions, this application may skip questions that are not required.
5. Use the tabs above or the Next & Previous buttons below to move through your application. **Do not use your web browser's Back or Forward buttons.**
6. Make sure you **submit** your application when complete. **Saving your application** is not the same as **submitting** your application. Only **submitted** applications can be processed for financial aid.
7. After you have hit the **submit** button, if you need to make changes, your wait time is a maximum of 24 hours to modify your submitted application.
8. You will see help screens pop up throughout the application.
9. You do not have to file taxes in order to complete the application. However, if you will file taxes, but haven't done so yet, you can submit your Dream Application now using estimated tax information, and then correct that information after you file your return.

Click on the **Student** Tab to begin your application!

Next

29:51 Min. Sec

Save Application

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2016-17 Dream Application

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Welcome *Finest Student* | Logout

Dream Act ID: 000012154

Dream Application

Instructions | Student | Dependency | Parent | Signature | Confirmation | CalSAR

Parent Signature

Finest R. Student
Dream ID # 000012154

Transaction Date: 12/11/2014
Transaction Number: 1

Congratulations! You have successfully submitted your application. Use your **Dream ID** to communicate with your school and CSAC and to renew your application next year! Always keep your email up-to-date.

Section I Action Needed

WHAT YOU MUST DO NOW (Use any comments listed below to make sure that any issues are resolved)

Action Needed	Comment Codes
There are issues with your Dream Act Application that need to be resolved before your eligibility can be determined. Be sure to file all the comment codes listed on this page, review your application and make any necessary corrections to your Dream Act Application.	001 047
Your parent DID NOT sign your Dream Act Application after you submitted it. At least one parent must sign to complete the Dream Act Application. Your parent can also do this by clicking the green Parent Signature button.	100

29:18 Min. Sec

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California Student Aid Commission

2016-17 Dream Application

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Welcome *Finest Student* | Logout

Dream Application

Instructions | Student | Dependency | Parent | Signature | Confirmation | CalSAR

Cal Student Aid Reports

Transaction Number	Submitted By	Processed
1	Applicant only	01/18/2015

28:47

CalSARReport.aspx.pdf - Adobe Acrobat Pro

California Student Aid Commission
Dream Act Student Aid Report

Dream Act Application Data

Assumed fields, based on the data you entered, are marked with an "*" (asterisk) sign.
The fields that are changed from last transaction are displayed in red.

Transaction Number: 1 Submitted By: SOFIA FIRST Processed: 01/18/2015 EFC: *

1. Student's last name:	FIRST
2. Student's first name:	SOFIA
3. Student's middle initial:	T
4. Student's permanent mailing address:	123 PRINCESS STREET

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How will students be notified?

- Cal Grant awardees receive email
- California Aid Report (CAR)
- Contact financial aid office



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When and Where

www.caldreamact.org

- Fall 2016 Financial Aid: Apply January 2016
- Submit application by March 2 deadline



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Today's Takeaways

- Direct Students to Dream Act application
- Submit your GPAs early
- Work your unmatched reports
- Browse our many Resources



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**Next Up,
FAFSA!**

www.csac.ca.gov

Institutional Support	Student Support
1-888-294-0153	1-888-224-7268
schoolsupport@csac.ca.gov	studentsupport@csac.ca.gov

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Federal Updates & The FAFSA

Federal Updates & The FAFSA



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FSA ID replaces FSA PIN!



What this means:

- **Improved** security
- User-selected username & password
- Eliminates need to supply SSN and date of birth for **login**
- Each FSA ID must have a unique email address!

Where to use an FSA ID:

- FAFSA on the Web
- My Federal Student Aid (studentaid.gov/login)
- NSLDS
- StudentLoans.gov
- TEACH Grant website

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School selection - school view

Starting 2016-2017

- Colleges will not see other schools listed on students' FAFSA results (SAR)
- Only state agencies will see **ALL** colleges listed on FAFSA

The screenshot shows the 'School Selection' step of the FAFSA process. It includes a search bar with 'northridge' entered, a 'SEARCH' button, and a table of search results. The table shows 'CALIF STATE UNIV/NORTHRIDGE' with a Federal School Code of 081153. There are also buttons for 'ADD >>>', 'VIEW SELECTED SCHOOL INFORMATION', 'PREVIOUS', and 'NEXT'.

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FAFSA.com domain name transfer

Through a negotiated settlement agreement, *Student Financial Aid Services (SFAS)* will transfer **FAFSA.com** to the U.S. Department of Education

You have accessed **www.FAFSA.com**

Student Financial Aid Services, Inc. is in the process of transferring this web domain to the U.S. Department of Education.

U.S. Department of Education	Student Financial Aid Services, Inc.
<p>Please click the link below if you would like to fill out the Free Application for Federal Student Aid (FAFSA), which needs to be completed to apply for federal student aid (grant, work-study and loans)</p> <p>Please visit www.StudentAid.gov if you would like to learn more about federal student aid and the FAFSA form.</p> <p>Dept of ED</p>	<p>If you are an existing client of Student Financial Aid Services and would like to access your account, please click the SFAS button below.</p> <p>If you would like to file a FAFSA, please visit www.FAFSA.gov.</p> <p>SFAS</p>

The website and text herein do not constitute an endorsement of a non-government product or service.

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FAFSA application cycle and PPY

Starting 2017-2018

- FAFSA available October 1st (2016)
- FAFSA will use “prior-prior-year” (PPY) income data
 - 2017-2018 FAFSA will use 2015 tax year information



When a Student Is Attending College (School Year)	When a Student Can Submit a FAFSA	Which Year's Income Information Is Required
July 1, 2015–June 30, 2016	January 1, 2015–June 30, 2016	2014
July 1, 2016–June 30, 2017	January 1, 2016–June 30, 2017	2015
July 1, 2017–June 30, 2018	October 1, 2016–June 30, 2018	2015
July 1, 2018–June 30, 2019	October 1, 2017–June 30, 2019	2016

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FAFSA on the Web (FOTW)



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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



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FAFSA on the Web (FOTW)

Using FOTW

- Ask Questions
- Browse Help
- View Deadlines & Announcements

www.fafsa.gov

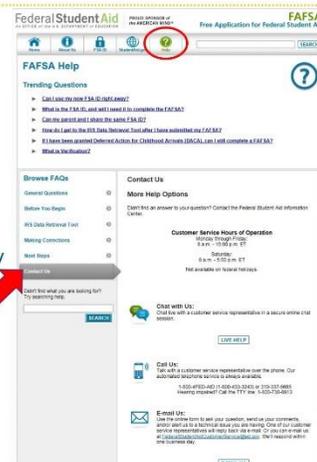


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FAFSA on the Web (FOTW)

Contact Us

- Live Help (Chat)
(Mon-Fri 5am-7pm)
- (800) 433-3243
(1-800 4FedAid)
- FederalStudentAidCustomerService@ed.gov



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FAFSA on the Web (FOTW)

Help

- Trending Questions
- FAQs
- Search

Federal Student Aid PROUD SPONSOR of the AMERICAN MIND® Free Application for Federal Student Aid

Home About Us FSA ID StudentAid.gov Help

FAFSA Help

Trending Questions

- ▶ Can I use my new FSA ID right away?
- ▶ What is the FSA ID, and will I need it to complete the FAFSA?
- ▶ Can my parent and I share the same FSA ID?
- ▶ How do I get to the IRS Data Retrieval Tool after I have submitted my FAFSA?
- ▶ If I have been granted Deferred Action for Childhood Arrivals (DACA), can I still complete a FAFSA?
- ▶ What is Verification?

Browse FAQs

General Questions

Before You Begin

IRS Data Retrieval Tool

General information about federal student aid, your eligibility for aid, the financial aid package, and more.

- ▶ What is the FAFSA?
- ▶ Am I eligible to receive financial aid?
- ▶ What types of aid are available?

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FOTW help at StudentAid.gov

Federal Student Aid PROUD SPONSOR of the AMERICAN MIND®

Present to College Types of Aid Who Gets Aid FAFSA Looking for Aid How to Reuse Your Loans

FOTW help at StudentAid.gov

Quick Links

- ▶ FAFSA on the Web
- ▶ FAFSA on the Web Verification
- ▶ FAFSA on the Web
- ▶ FAFSA on the Web

Resources

- ▶ FAFSA on the Web
- ▶ FAFSA on the Web
- ▶ FAFSA on the Web

General Advice

Brochures

FAQs

This Application for Federal Student Aid

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FOTW Overview: 7-Step Process

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California Association of Student Financial Aid Administrators

ECMC



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Step 1: About the Student



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Student Demographics

Check for:

- Name matches student Social Security card
- Transposed numbers
- Incorrect data in numeric fields

Tip: Use the **Help and Hints** section on each page

Simple mistakes can delay processing FAFSA and determining eligibility for financial aid

The screenshot shows the 'Student Demographic Information' form. On the right side, there is a 'Help and Hints' section titled 'Student's E-mail Address Question 13'. A red arrow points to this section. The form includes fields for name, Social Security Number, date of birth, gender, mailing address, ZIP code, and phone number. At the bottom, there are navigation buttons: 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.

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Student Eligibility



Important Items:

- Citizenship status
- High school graduation status
- Grade level
- New question regarding **foster youth** status

The screenshot shows the 'Student Eligibility' form. It contains several questions with dropdown menus and radio buttons. Questions include: 'Are you a U.S. citizen?', 'Are you registered with the Selective Service System?', 'When you begin college in the 2015-2016 school year, what will be your high school completion status?', 'When you begin the 2015-2016 school year, what will be your grade level?', 'When you begin the 2015-2016 school year, what degree or certificate will you be working on?', 'Are you interested in being considered for work-study?', 'Will you have your first bachelor's degree before July 1, 2015?', and 'Are you a foster youth or were you at any time in the foster care system?'. At the bottom, there are navigation buttons: 'PREVIOUS', 'NEXT', 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'.

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Student Eligibility

Students with a high school diploma must:

- Identify their high school
- Select **Confirm** to find a match
- **Select** the school from the list or select **Next** to continue if the school is not showing on the list

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Step 2: School Selection

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ECMC



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School (college) Selection

Add a school

- Federal School Code
- Search by:
 - State
 - City
 - Name of college

Housing plans

- On campus
- With parent
- Off campus

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Step 3: Determining Student Dependency Status



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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, 1922?
 Yes No

As of today, are you married?
 Yes No

At the beginning of the 2015-2016 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, 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, 2015 and June 30, 2016?
 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, 2015?
 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

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

On or after July 1, 2014, 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

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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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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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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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Homeless, Unaccompanied Youth

Select **YES** if any time after July 1, 2015, 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, or temporarily living with other people because the student has nowhere else to go

"Unaccompanied"

- Not in the physical custody of a parent or guardian

"Youth"

- Under 21 years of age

Resource for homeless students: NAEHCY.org

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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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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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...then...

- Colleges have the authority to "override" federal criteria for making a student independent
- 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](#)

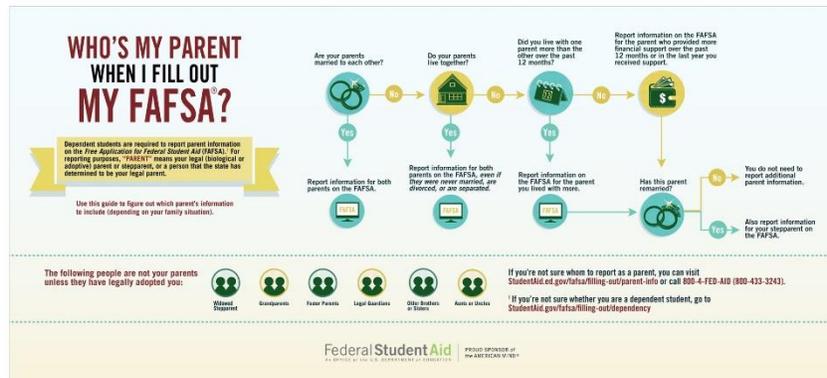
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Step 4: Parental Information for Dependent Students



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Whose info goes on a FAFSA?



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Responses on the FAFSA

Never Married

Unmarried and both parents living together

Married or Remarried

Divorced or Separated

Widowed

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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 prior 12 months
- If both parents are still living together, use information for both parents on FAFSA

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Remarried Parent

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

- 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 on the FAFSA (if they provided more than half of their support)

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NO Parental Information



Do not provide parent information for

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

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Parent Information

- Demographics
- Marital status will determine what questions are asked of the parent(s)

Parent Demographics Information

Application was successfully saved.

As of today, what is the marital status of your legal parents (biological and/or adoptive)?
 Married or Remarried

When did your parents get married or remarried? Enter the month and year. (mm/yyyy)
 08/1990

What is your father's/stepfather's Social Security Number? What is your father's/stepfather's last name?
 Smith

What is your father's/stepfather's first initial? What is your father's/stepfather's date of birth? (mm/dd/yyyy)
 J 01/01/1970

What is your mother's/stepmother's Social Security Number? What is your mother's/stepmother's last name?
 McConnell

What is your mother's/stepmother's first initial? What is your mother's/stepmother's date of birth? (mm/dd/yyyy)
 K 04/18/1972

Your parents' e-mail address
 @emailworld.com

Re-enter your parents' e-mail address
 @emailworld.com

Have your parents lived in California for at least 5 years?
 Yes No

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Parent Information

- Household Size: Parent provides more than 50% financial support
- Number in College: Students enrolled at least half-time

Your parents' number of family members in 2015-2016 (household size)
 If you are not sure who is considered a family member, click **Household Size** to answer the questions on the worksheet.

04 HOUSEHOLD SIZE

How many people in your parents' household will be college students between July 1, 2015 and June 30, 2016? Do not include your parents.
 1

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NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

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Parent Income Information

IRS Data Retrieval Tool (DRT)

- Transfers information directly from the IRS
 - Requires **FSA ID**
 - Available in early February (*estimate*)
 - Available after filing 2015 federal tax return
 - 3+ weeks after electronic filing
 - 11+ weeks after paper filing

Parent Tax Information

Application was successfully saved.

For 2014, have your parents completed their IRS income tax return or another tax return?
 Already completed [x]

For 2014, what is your parents' tax filing status according to their tax return?
 Married/Filed Joint Return [x]

You, the parents, may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.

Did you, the parents, file a Form 1042X amended tax return?
 Yes No

Did you, the parents, file a Puerto Rican or foreign tax return?
 Yes No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. How you flag your status can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

Which parent are you?
 Select [x]

What is your (the parents) FSA ID?
 FSA ID Username or Verified E-mail Address [Create an FSA ID](#)
[Forgot Username](#)
 FSA ID Password [Forgot Password](#)
[LINK TO IRS](#)

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Parent Asset Information

Note: Asset filtering question

As of today, does the total amount of your parents' current assets exceed \$36,300.00?
 Yes No

As of today, what is your parents' total current balance of cash, savings, and checking accounts?
\$.00

As of today, what is the net worth of your parents' investments, including real estate (not your parents' home)?
\$.00

As of today, what is the net worth of your parents' current businesses and/or investment farms?
\$.00

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Step 5: Student Income and Assets

casfaa
California Student Aid Commission

ECMC



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Student Income & Assets

- Same questions as asked of parents
- If student will not file a tax return, they may still be asked:
 - Amount earned from work
 - Asset information

Student Tax Information

For 2015, have you completed your IRS income tax return or another tax return?
Not going to file

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Step 6: Signatures and Certification



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Sign and Submit (Student)

Select signature method

- FSA ID or printed signature page

Terms of Agreement

- \$\$\$ to be used for *education-related expenses* only
- Student is not in default on a federal student loan
- Student does not owe a refund of a federal Title IV grant
- Can receive Federal Pell Grant from only one college for the same period of time
- Agree to provide tax information and other requested documents

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Sign and Submit (Parent)

Select signature method

- FSA ID or printed signature page

Terms of Agreement

- Provide documents to verify accuracy of information (if requested)
- IRS verification

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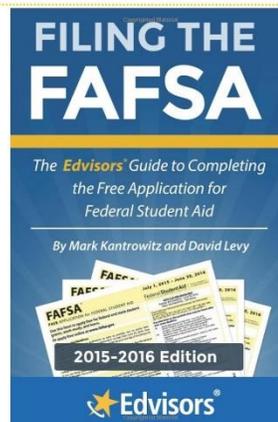
Student Aid Report (SAR)

- Electronically sent within **3-5 days** if FAFSA was submitted online with a valid email address
- Electronically sent within **2 weeks** if a paper FAFSA was submitted with a valid email address
 - Filers (with a valid email address) get an email from **Federal Student Aid** with subject “*FAFSA Results...*”
- Sent by U.S. Postal mail within **3 weeks** if the FAFSA (online or paper) was submitted without a valid email address

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Free Book about Filing the FAFSA

- 250-page book about completing the Free Application for Federal Student Aid (FAFSA)
- Maximize eligibility for student aid
- Avoid common errors
- Complete the form quickly, easily and accurately
- **FREE** PDF version download at:
edvisors.com/fafsa-book



Questions?

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CALIFORNIA ASSOCIATION OF SCHOOL FACULTY AND ADMINISTRATORS

ECMC



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Resources

Federal Student Aid

- I. **Free Application for Federal Student Aid (FAFSA)**
The application used by nearly all colleges and universities to determine eligibility for federal, state, and college-sponsored financial aid including grants, loans, and work-study program.
www.fafsa.gov
- II. **Questions about completing the FAFSA**
www.fafsa.ed.gov/help.htm
- III. **U.S. Department of Education Glossary**
Need assistance understanding terms used while completing the FAFSA? These online glossary sites will be a great resource.
studentaid.gov/sa/glossary
www.nasfaa.org/glossary.aspx
- IV. **National Student Aid Profile**
www.nasfaa.org/uploads/documents/2015_national_profile.pdf

State Financial Aid

- V. **Cal Grant GPA Verification Form**
www.csac.ca.gov/doc.asp?id=1177
- VI. **High School Financial Aid Basics and Resources**
www.csac.ca.gov/doc.asp?id=983
- VII. **WebGrants 4 Students**
www.webgrants4students.org
- VIII. **Cal Grant Resources:**
www.calgrants.org/
- IX. **California Chafee Grant**
www.chafee.csac.ca.gov/
- X. **CA Dream Act Application**
www.caldreamact.org/

Scholarships References

- XI. **Fastweb – Online resource for finding scholarships to help pay for school.**
Access to online resources to download and print.
www.fastweb.com

Special Circumstances & Populations References

- XII. **Scholarships For Military Families**
studentaid.ed.gov/sa/sites/default/files/scholarships-for-military.pdf
- XIII. **Unaccompanied Youth Toolkit for High School Counselors and McKinney-Vento Liaisons**
www.naehcy.org/toolkit-high-school-counselors
- XIV. **Students in Unique Situations: Tips for Completing the FAFSA**
www.nasfaa.org/uploads/documents/unique_situations_tip_sheet.pdf

Other Information References

- XV. **The Selective Service System**
www.sss.gov/
- XVI. **Tax Benefits for Education: Information Center**
www.irs.gov/uac/Tax-Benefits-for-Education:-Information-Center
- XVII. **CSS/Financial Aid PROFILE – Student Guide**
professionals.collegeboard.com/profdownload/PROFILE_Student_Guide.pdf
- XVIII. **Student Aid and Identity Theft**
www2.ed.gov/about/offices/list/oig/misused/idtheft.pdf
- XIX. **College Fee Waiver for Veteran Dependents**
www.calvet.ca.gov/VetServices/Pages/College-Fee-Waiver.aspx