Reference Materials

casfaa.org/hsrc

www.csac.ca.gov/doc.asp?id=1438

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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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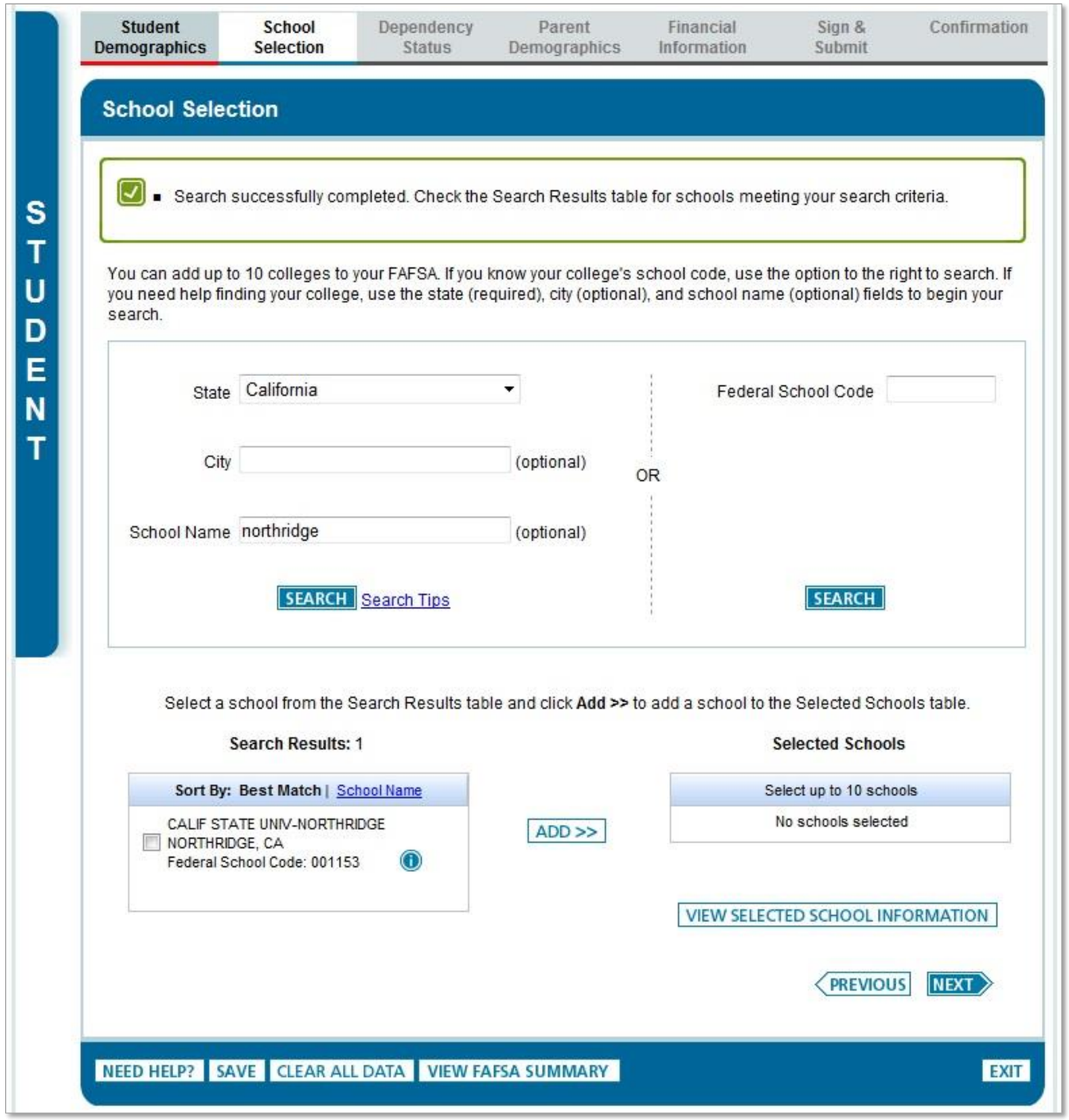
School Selection - School View

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



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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

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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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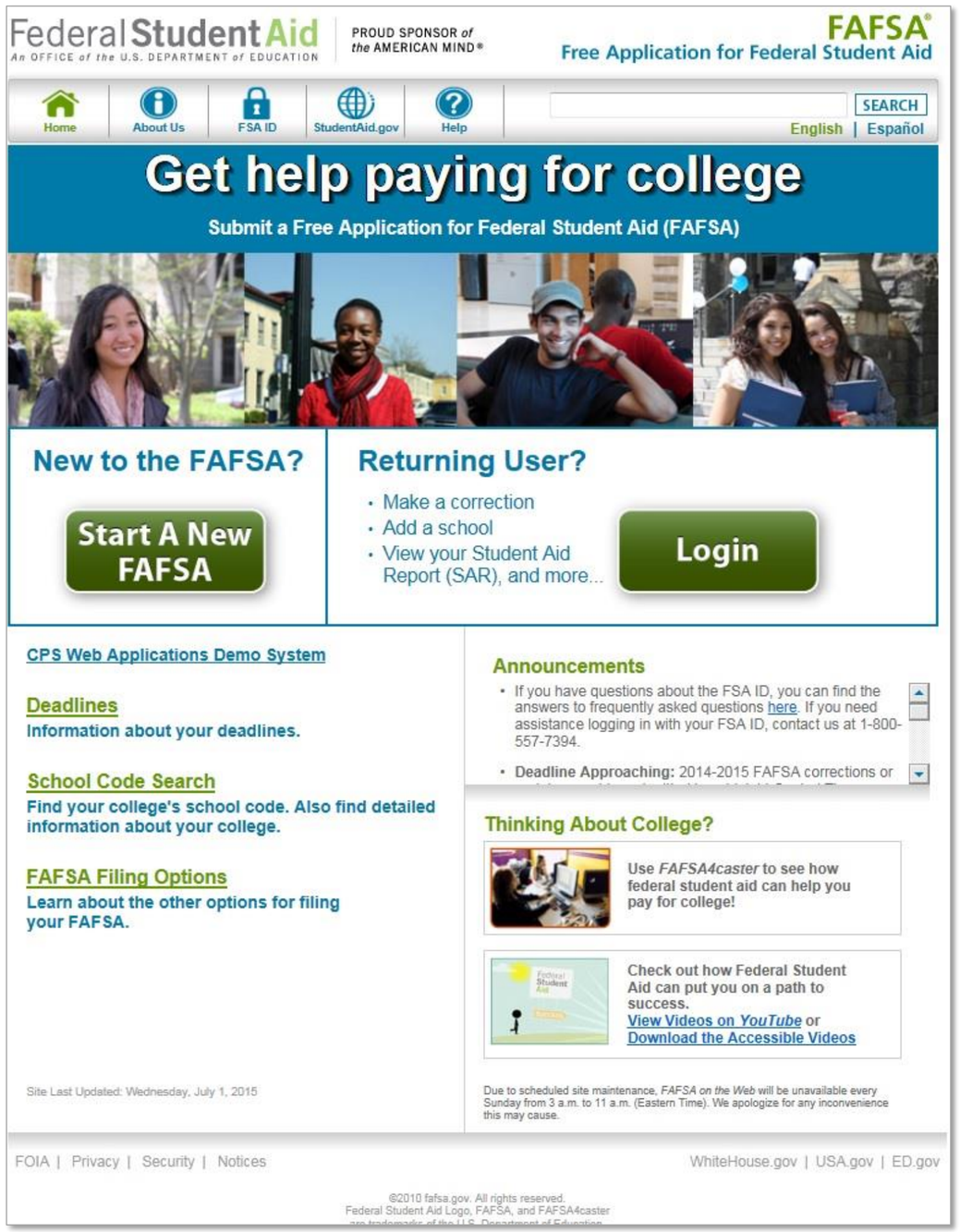
FAFSA on the Web (FOTW)

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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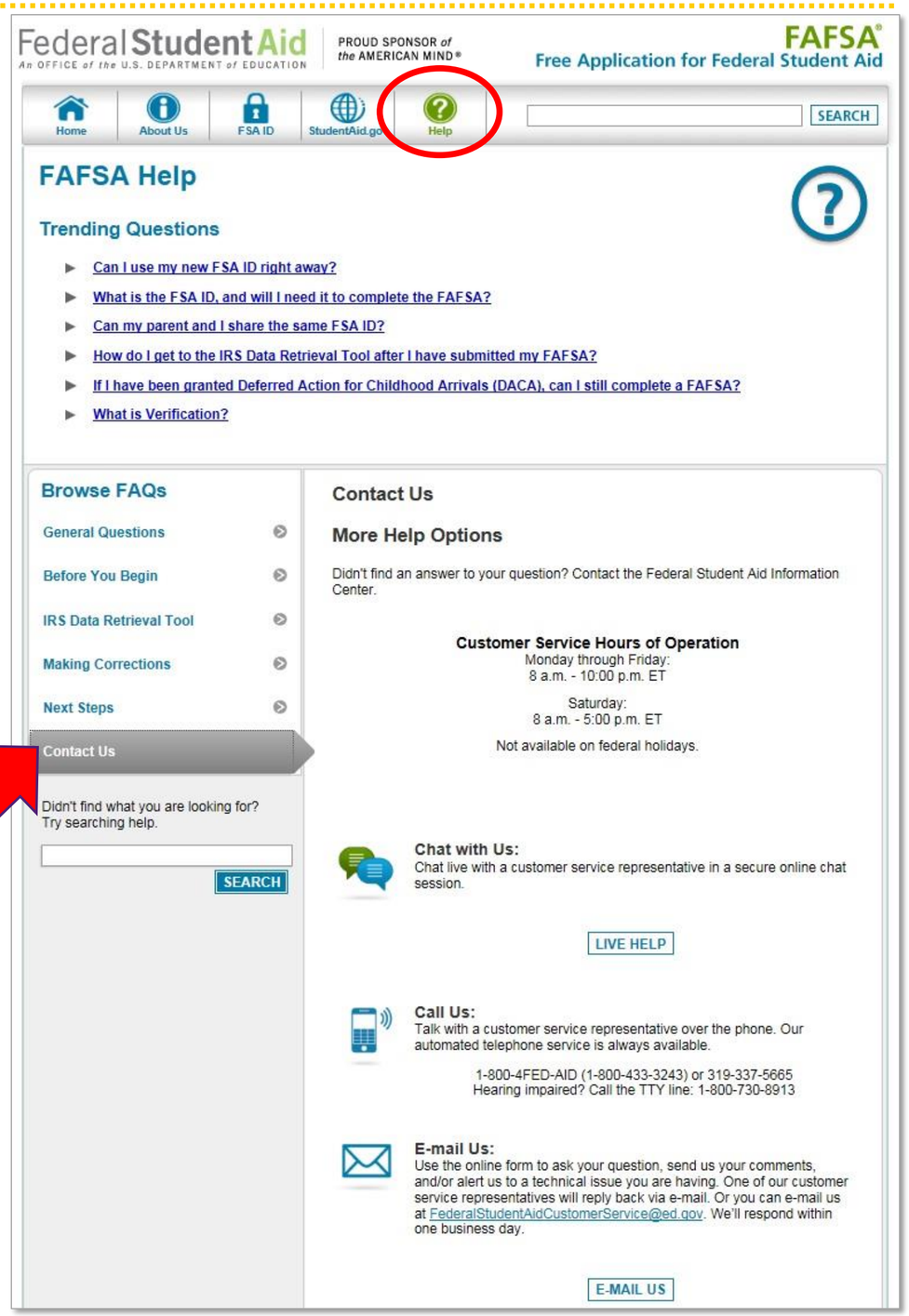
FAFSA on the Web (FOTW)

Contact Us

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



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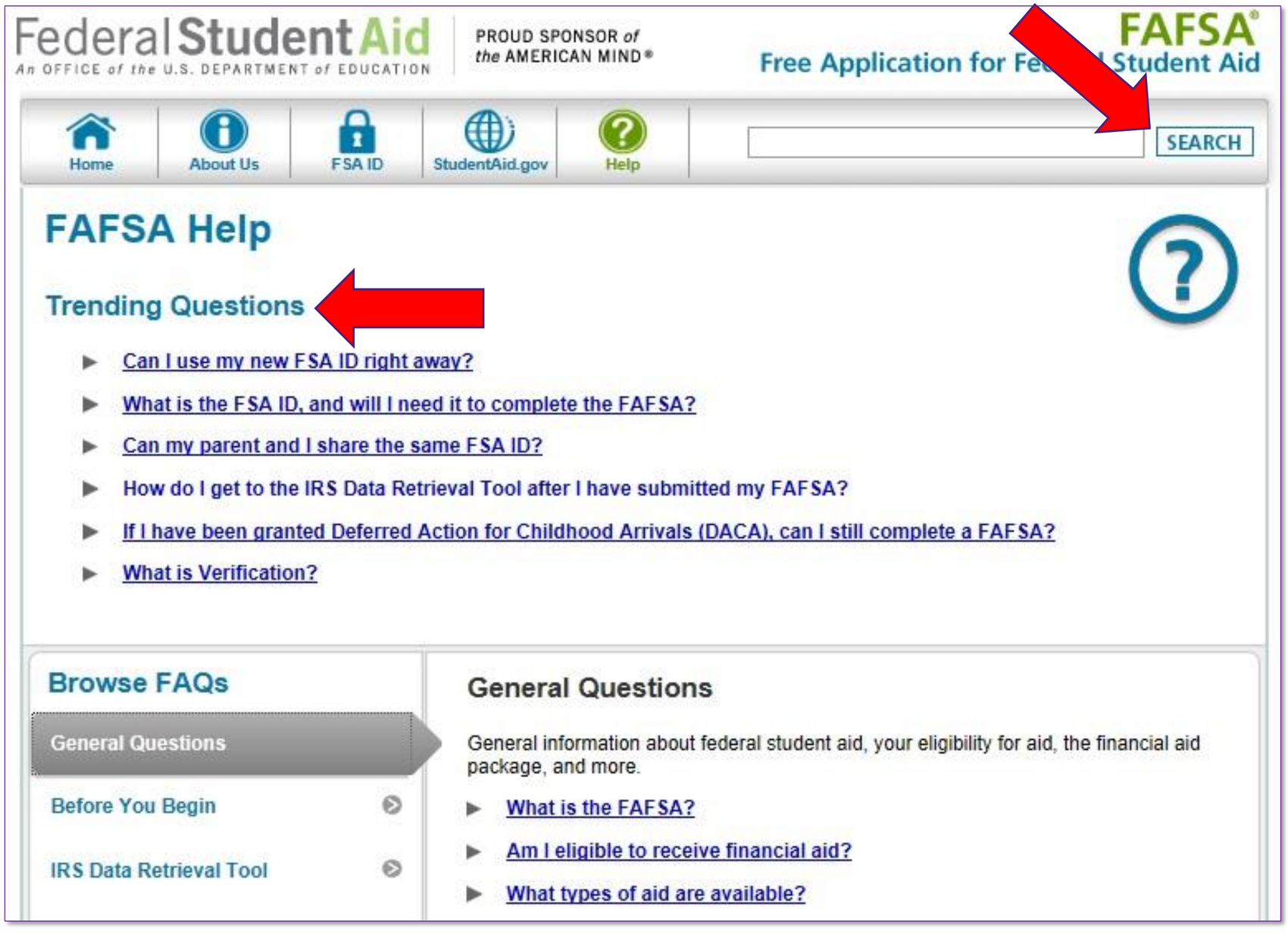
FAFSA on the Web (FOTW)

Help

- Trending Questions
- FAQs
- Search



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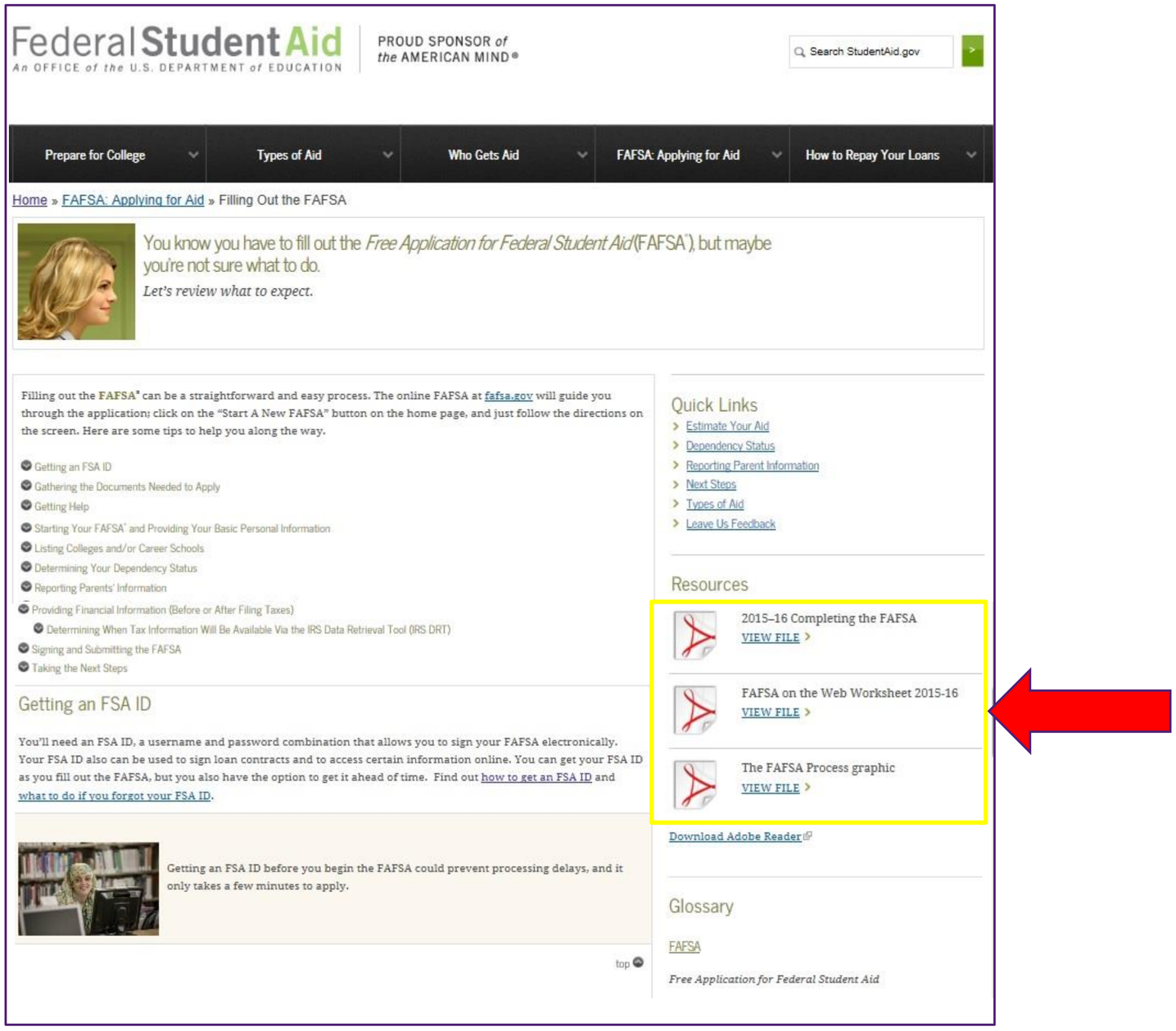
FOTW help at StudentAid.gov



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FOTW Overview: 7-Step Process

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Step 1:
About the Student

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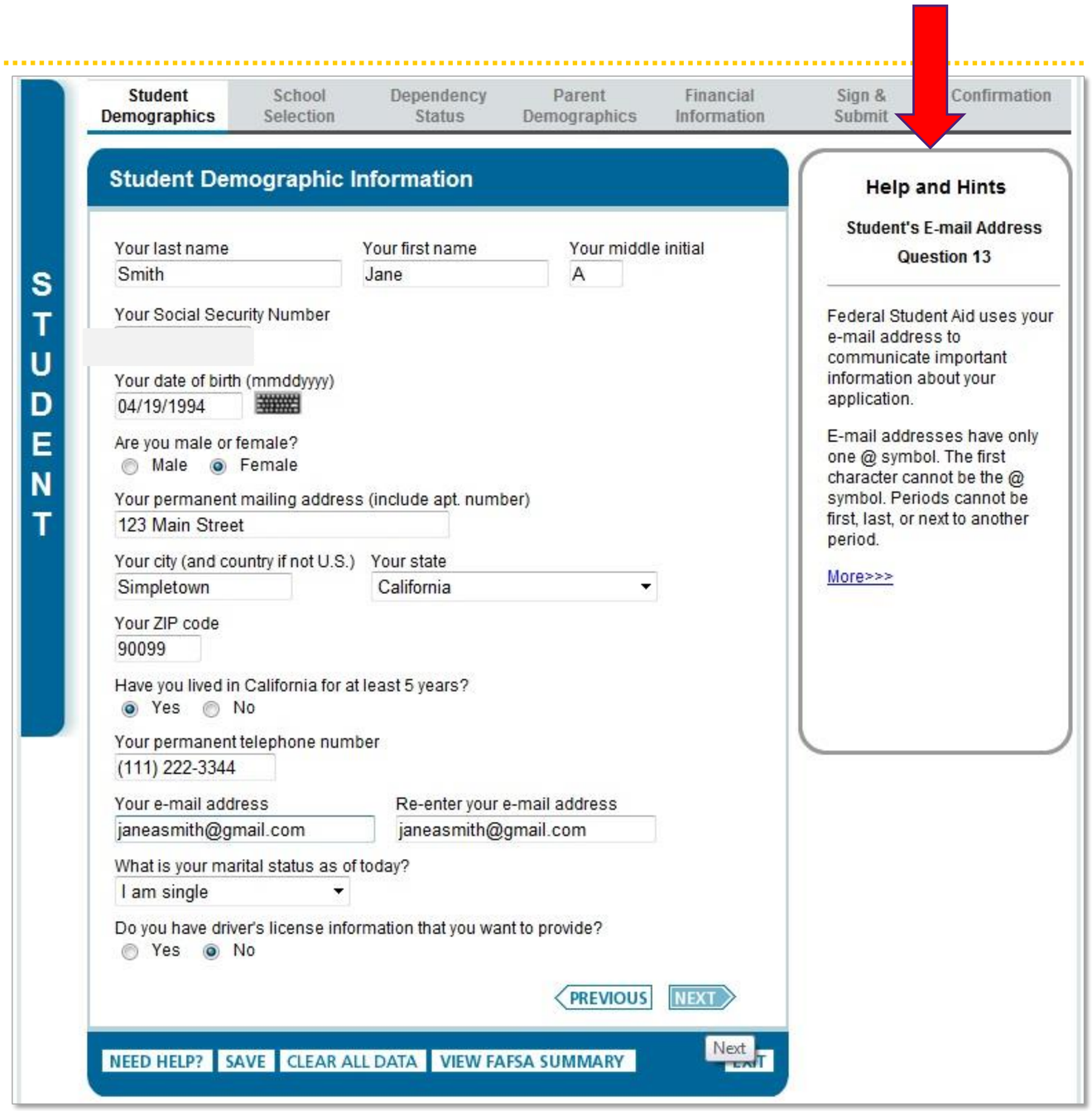
Student Demographics

Check for:

- Name matches student Social Security card
  - Watch out – Naturalized Citizens
- 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



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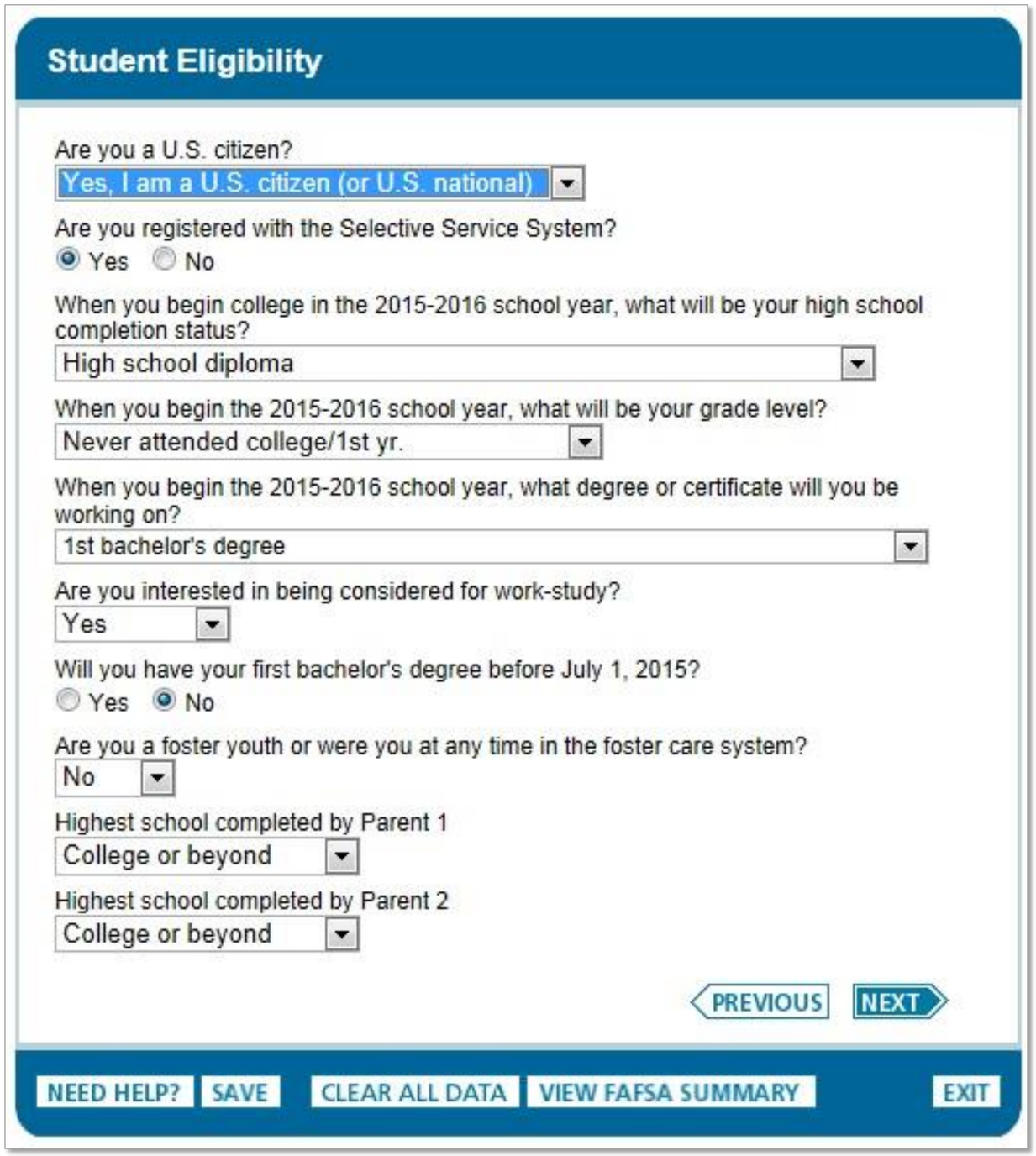
Student Eligibility

Important Items:

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



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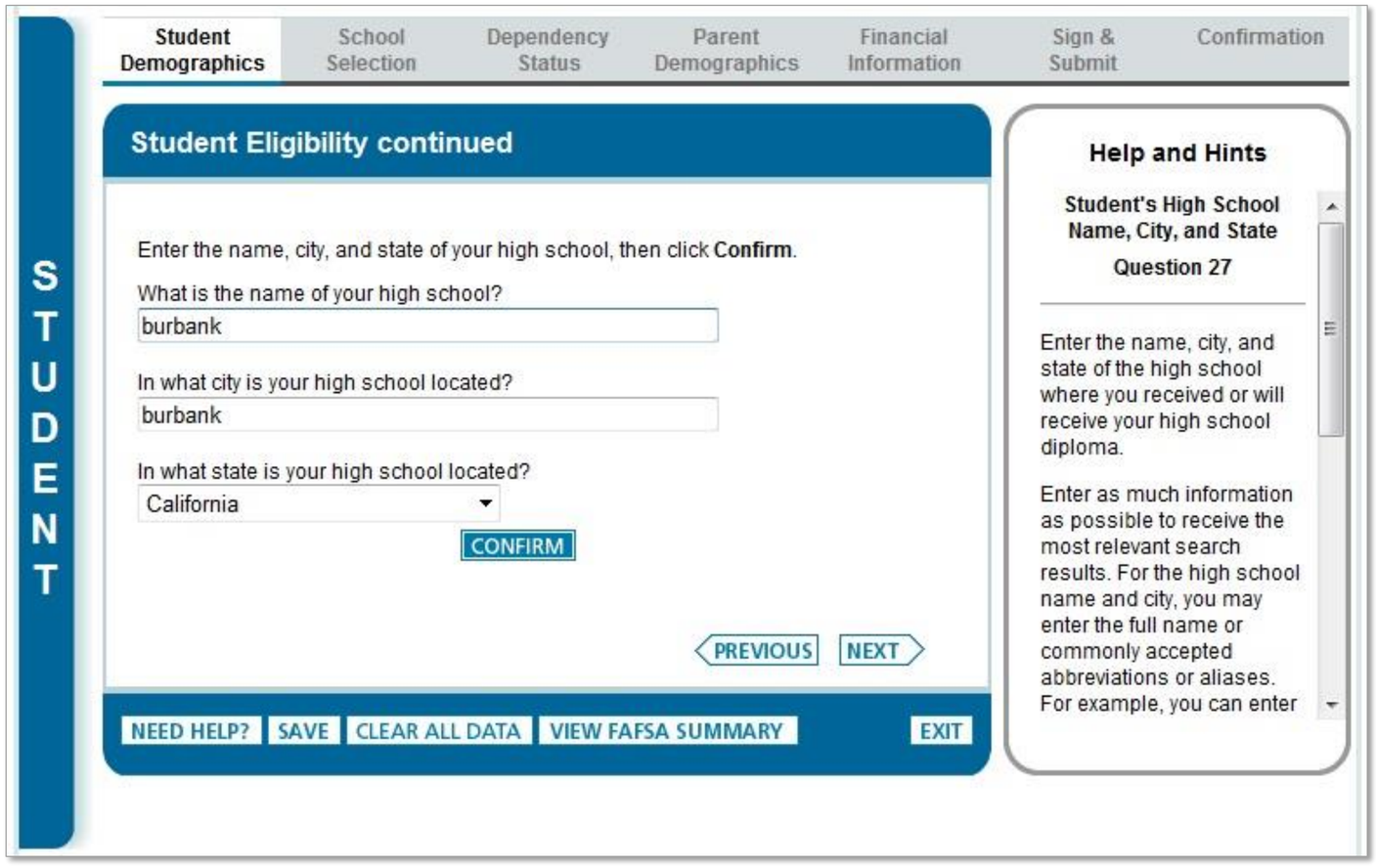
Student Eligibility

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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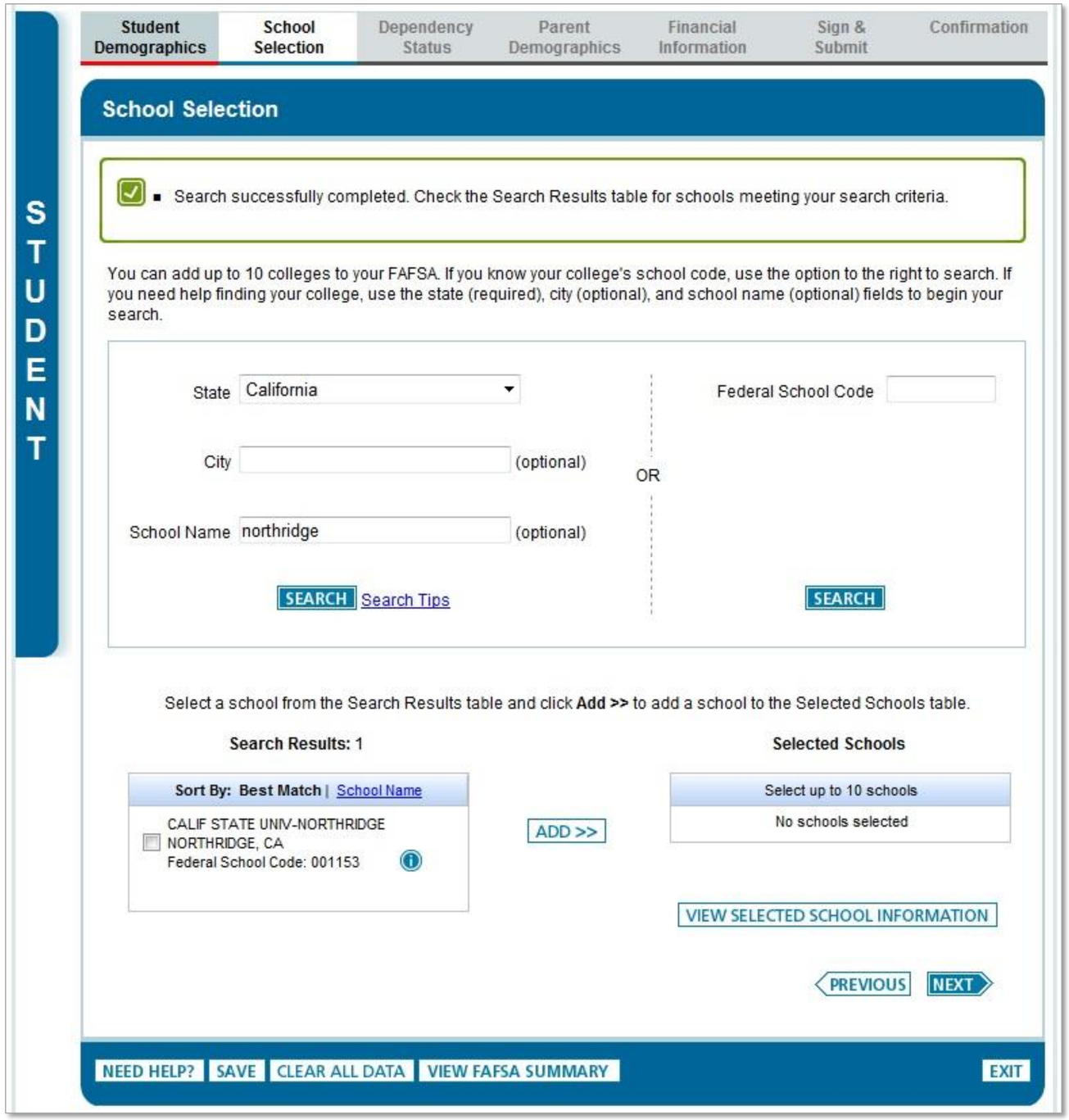
School (college) Selection

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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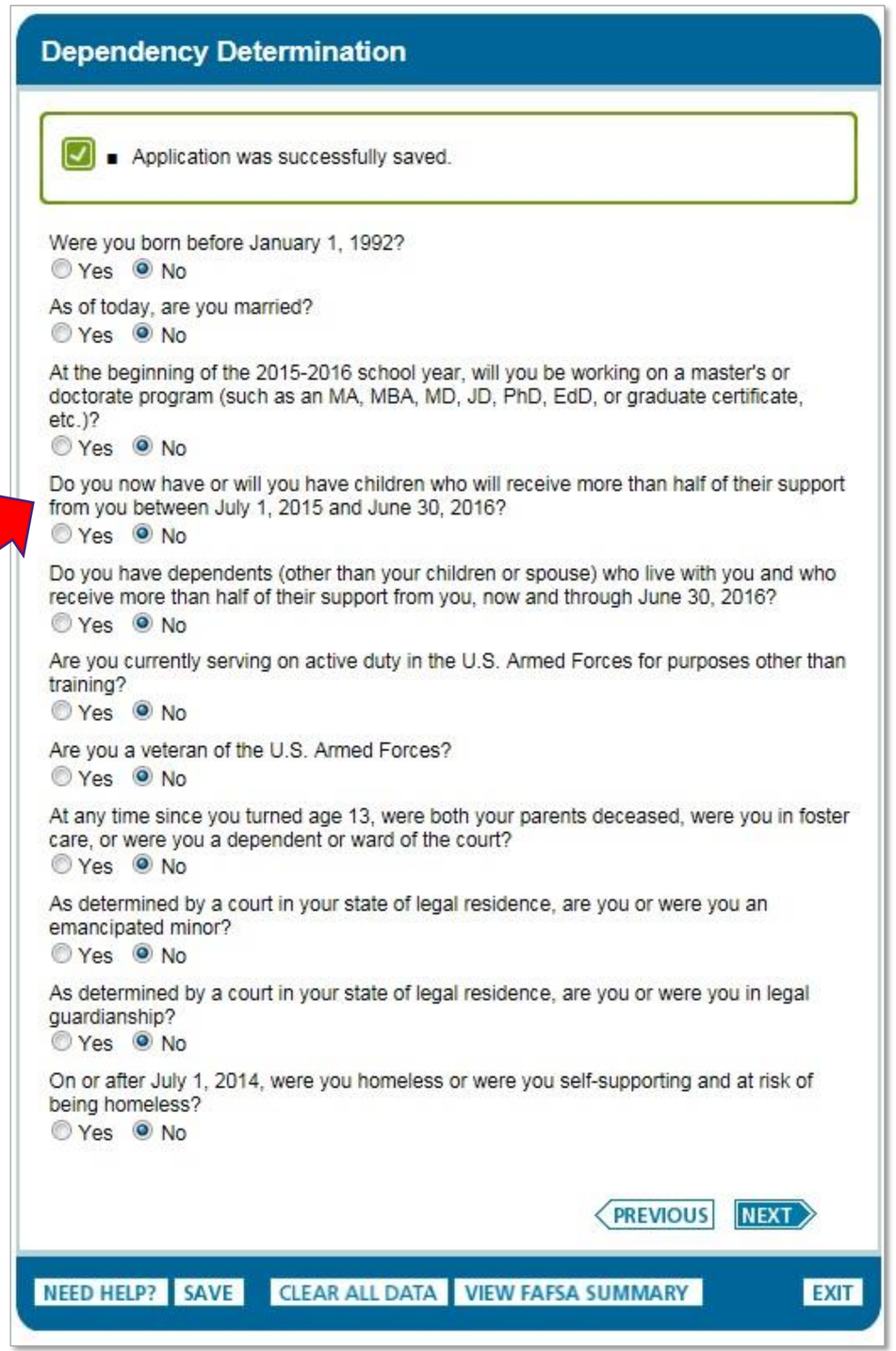
Dependency Determination

NO to all questions:

- makes the student "dependent"
- Must submit parent information

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



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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, **AND**

"**Unaccompanied**"

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

"**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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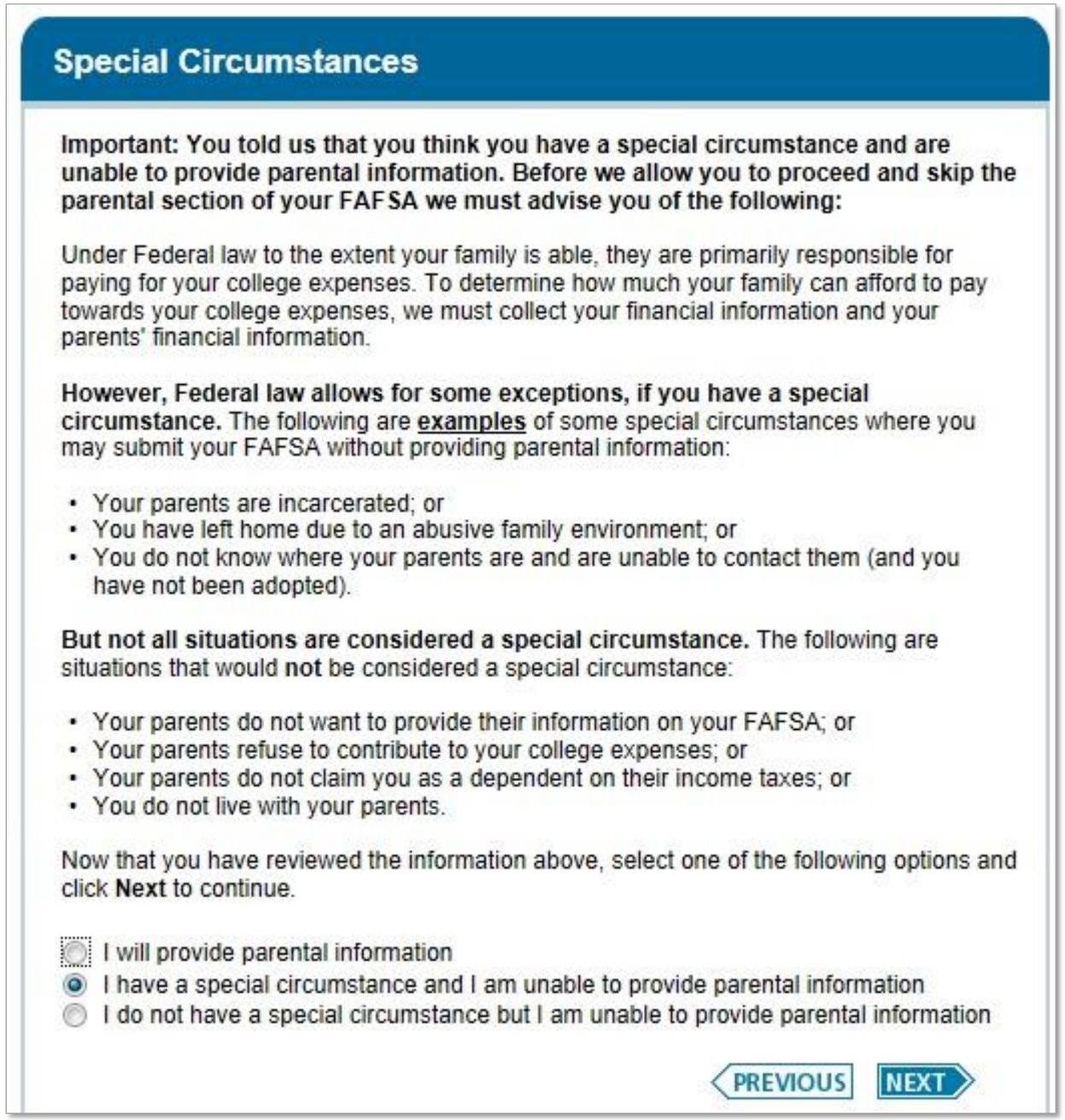
…then…

- Colleges have the authority to “override” federal 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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Step 4:
Parental Information for Dependent Students

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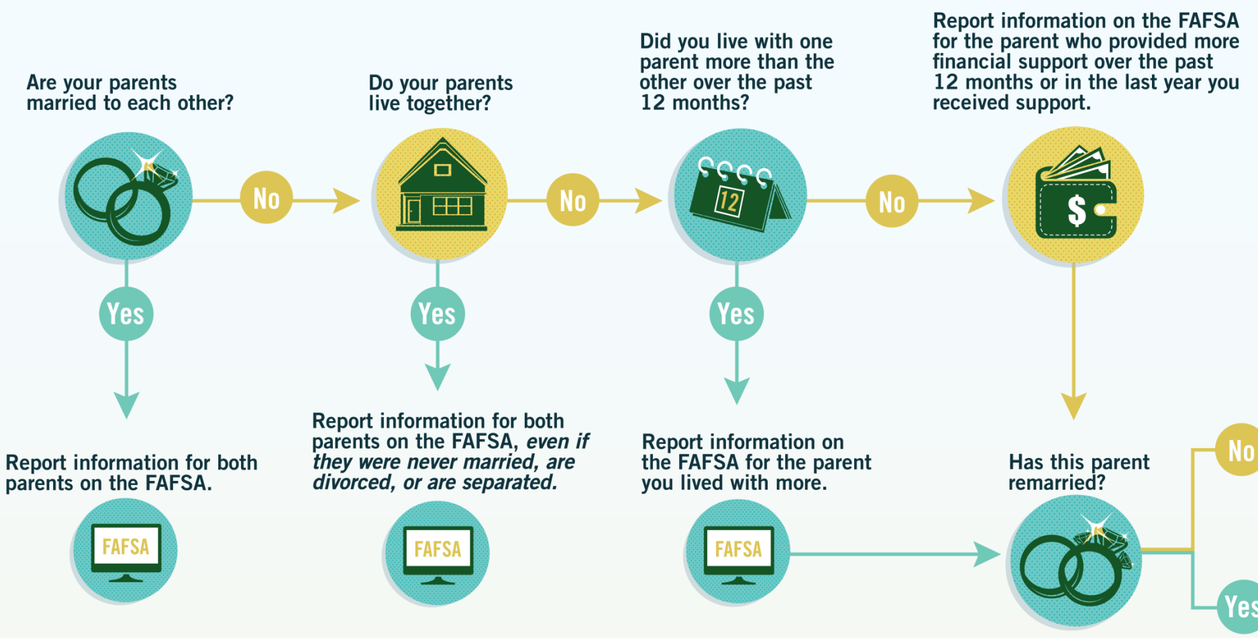
Whose info goes on a FAFSA?

WHO'S MY PARENT WHEN I FILL OUT MY FAFSA®?

Dependent students are required to report parent information on the *Free Application for Federal Student Aid* (FAFSA).[1] For reporting purposes, "PARENT" means your legal (biological or adoptive) parent or stepparent, or a person that the state has determined to be your legal parent.

Use this guide to figure out which parent's information to include (depending on your family situation).



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

- Widowed Stepparent
- Grandparents
- Foster Parents
- Legal Guardians
- Older Brothers or Sisters
- Aunts or Uncles

If you're not sure whom to report as a parent, you can visit StudentAid.ed.gov/fafsa/filling-out/parent-info or call 800-4-FED-AID (800-433-3243).

[1] If you're not sure whether you are a dependent student, go to StudentAid.gov/fafsa/filling-out/dependency

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Did you live with one parent more than the other over the past 12 months?

No

Report information on the FAFSA for the parent who provided more financial support over the past 12 months or in the last year you received support.

Yes

you lived with more.

this parent remarried?

No

You do not need to report additional parent information.

Yes

Also report information for your stepparent on the FAFSA.

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

Widowed Stepparent

Aunts or Uncles

Aunts or Uncles

Foster Parents

Grandparents

Older Brothers or Sisters

Older Brothers or Sisters

Legal Guardians

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 and will continue to provide more than half of their support for the coming academic year)

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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 guardian(s)**
  - Colleges may use professional judgment to allow the student to file as an independent student
  - **Exception**: Adoptive parents

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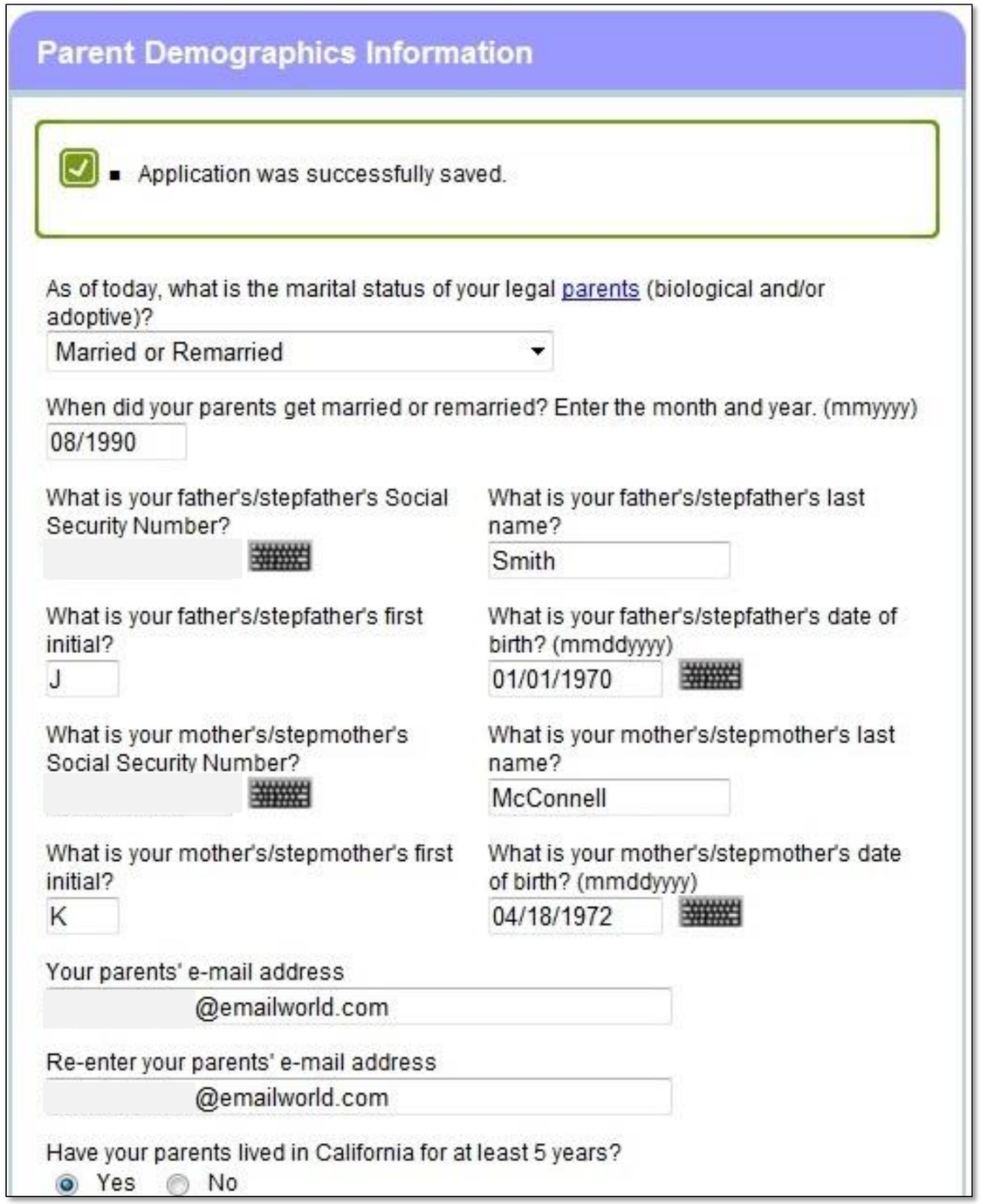
Parent Information

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



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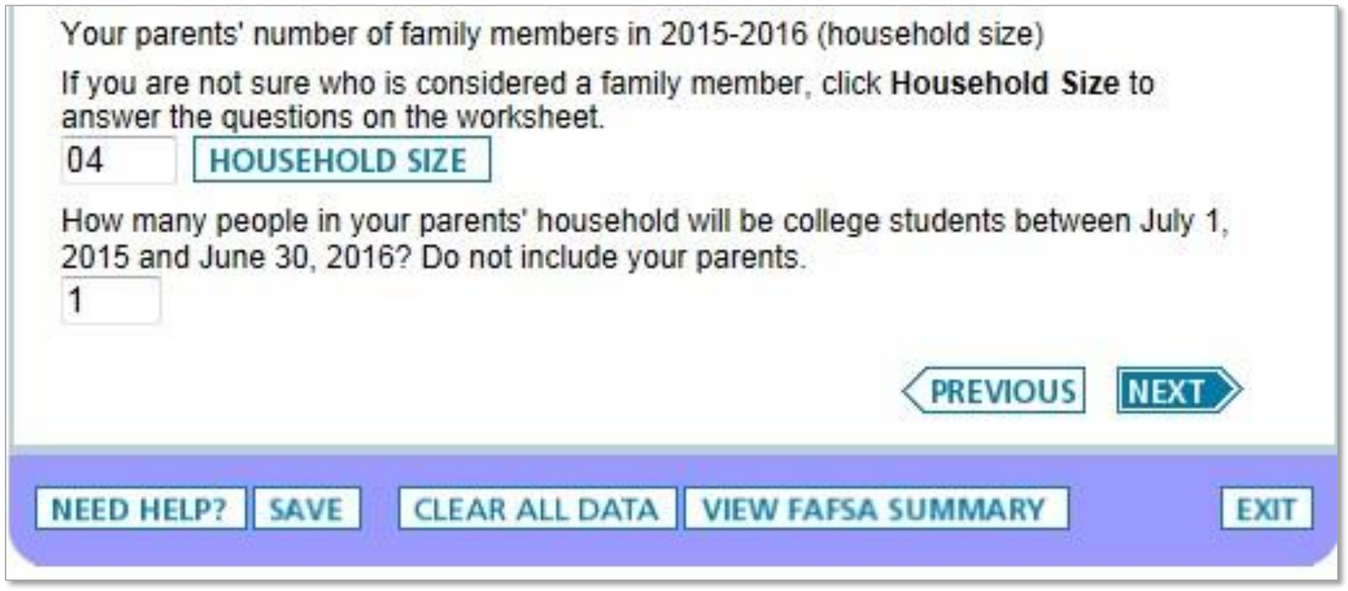
Parent Information

- Household Size:
  Parent provides more than 50% financial support

- Number in College:
  Students enrolled at least half-time



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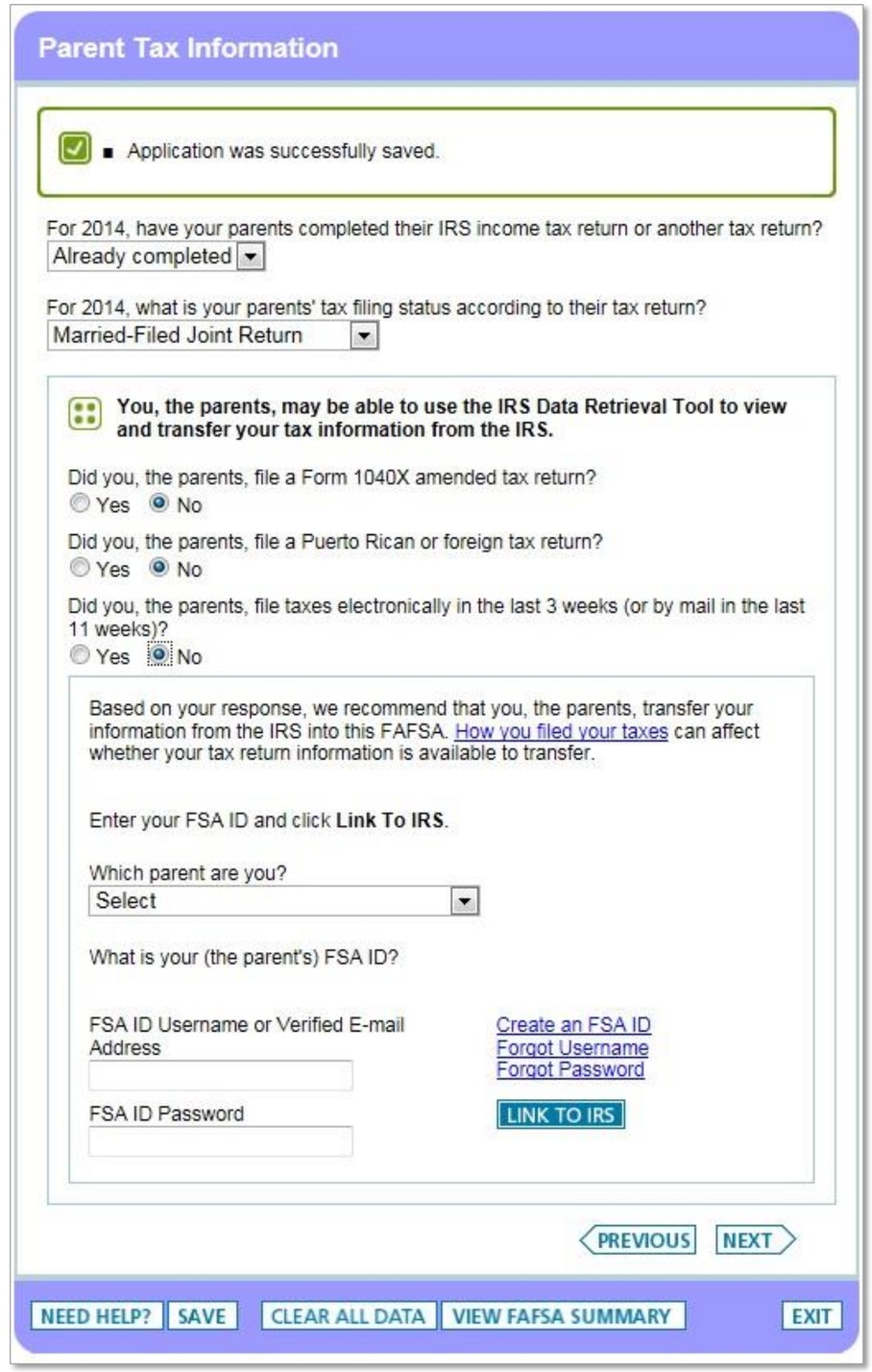
Parent Income Information

IRS Data Retrieval Tool (DRT)

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



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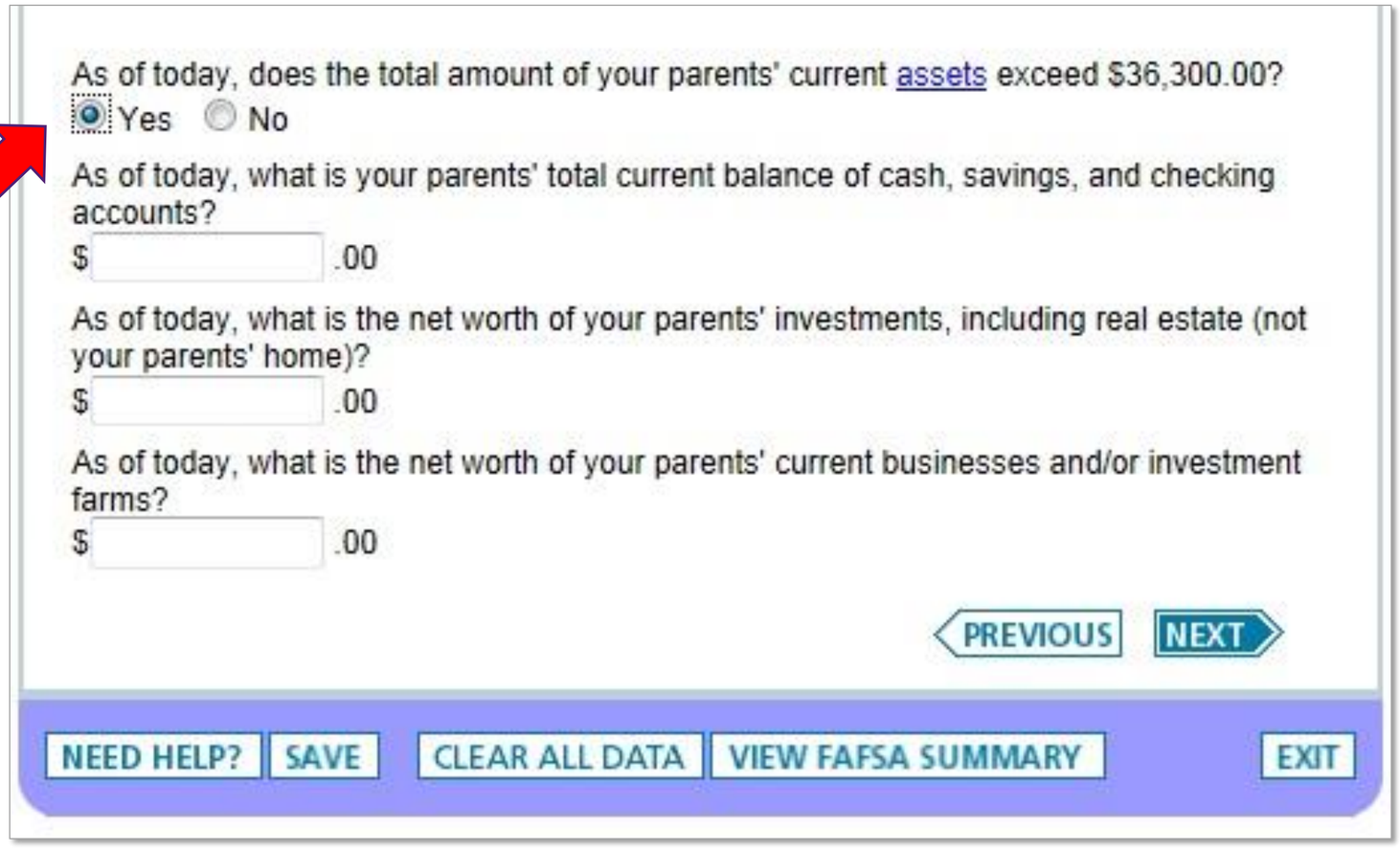
Parent Asset Information

Note: Asset filtering question



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Step 5:
Student Income and Assets

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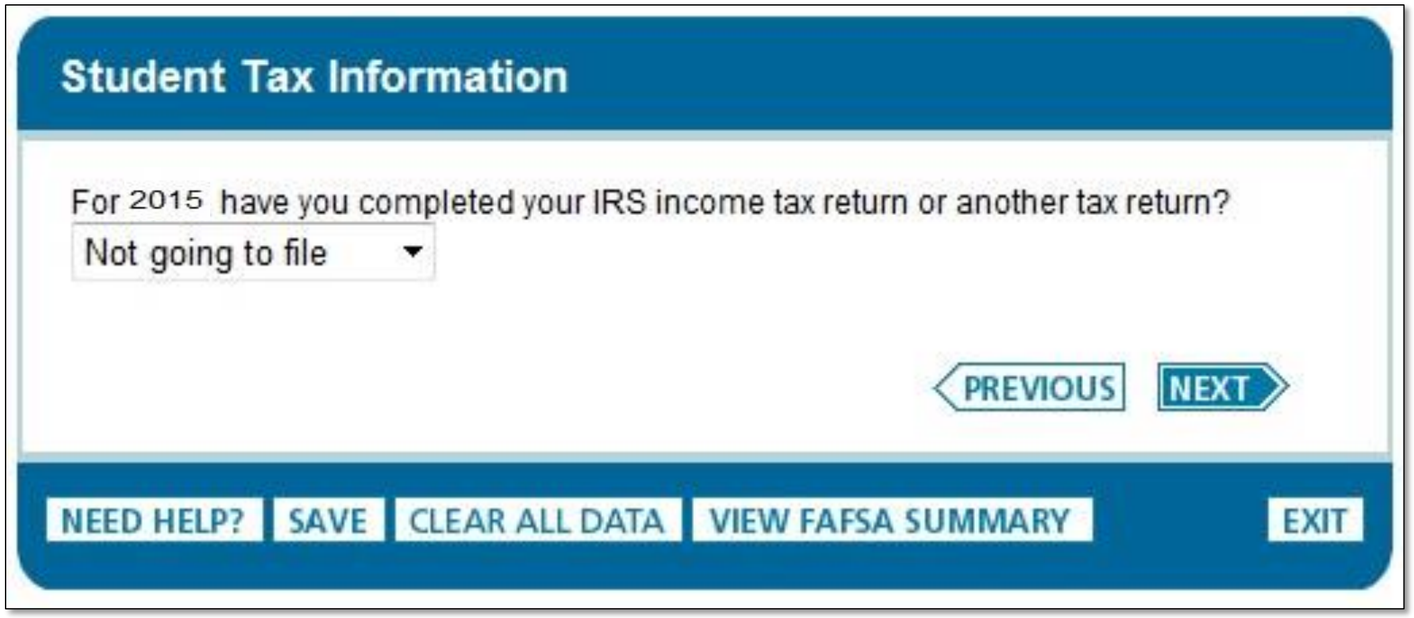
Student Income & Assets

- 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



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Step 6:

Signatures and Certification

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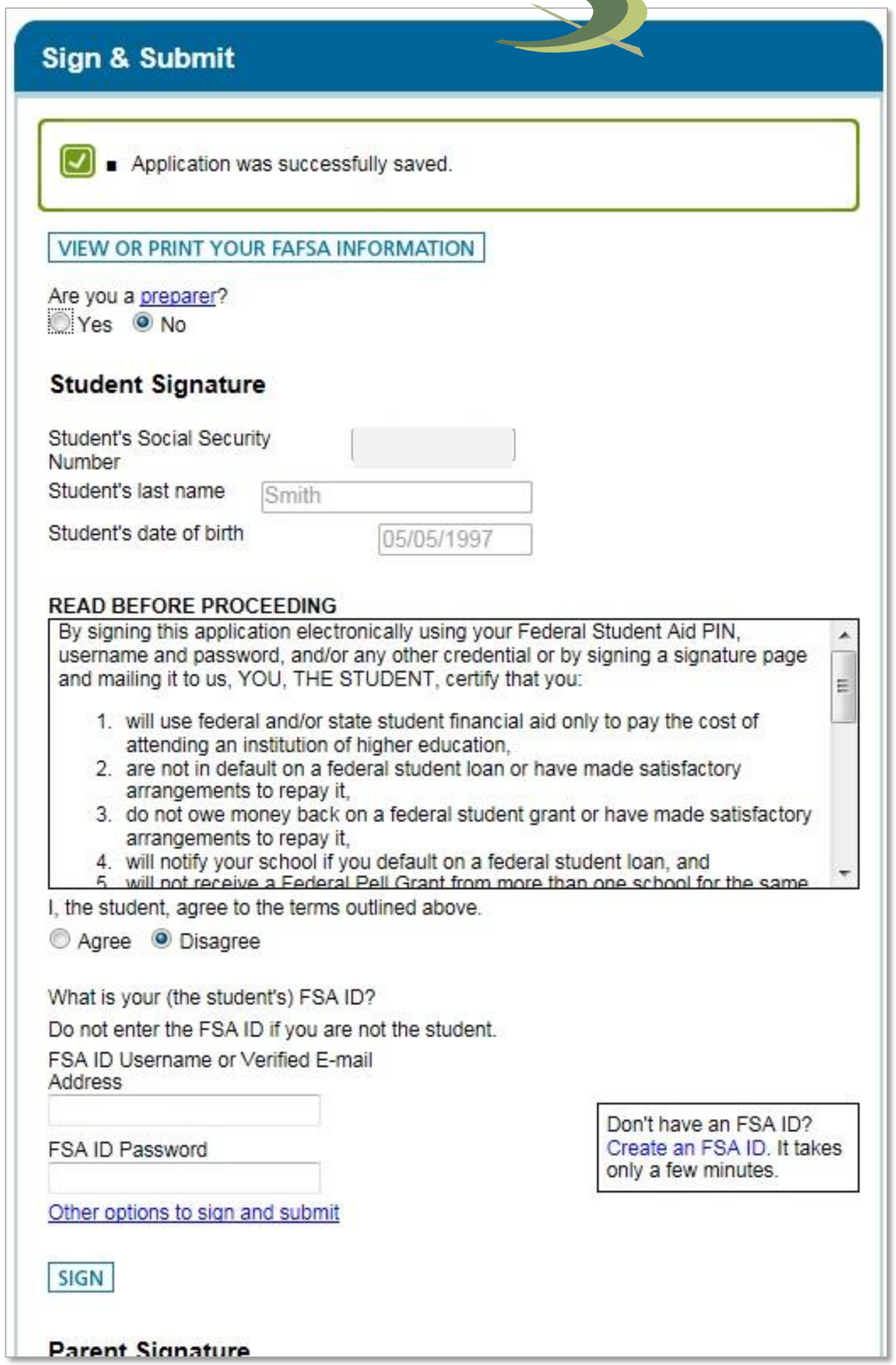
Sign and Submit (Student)

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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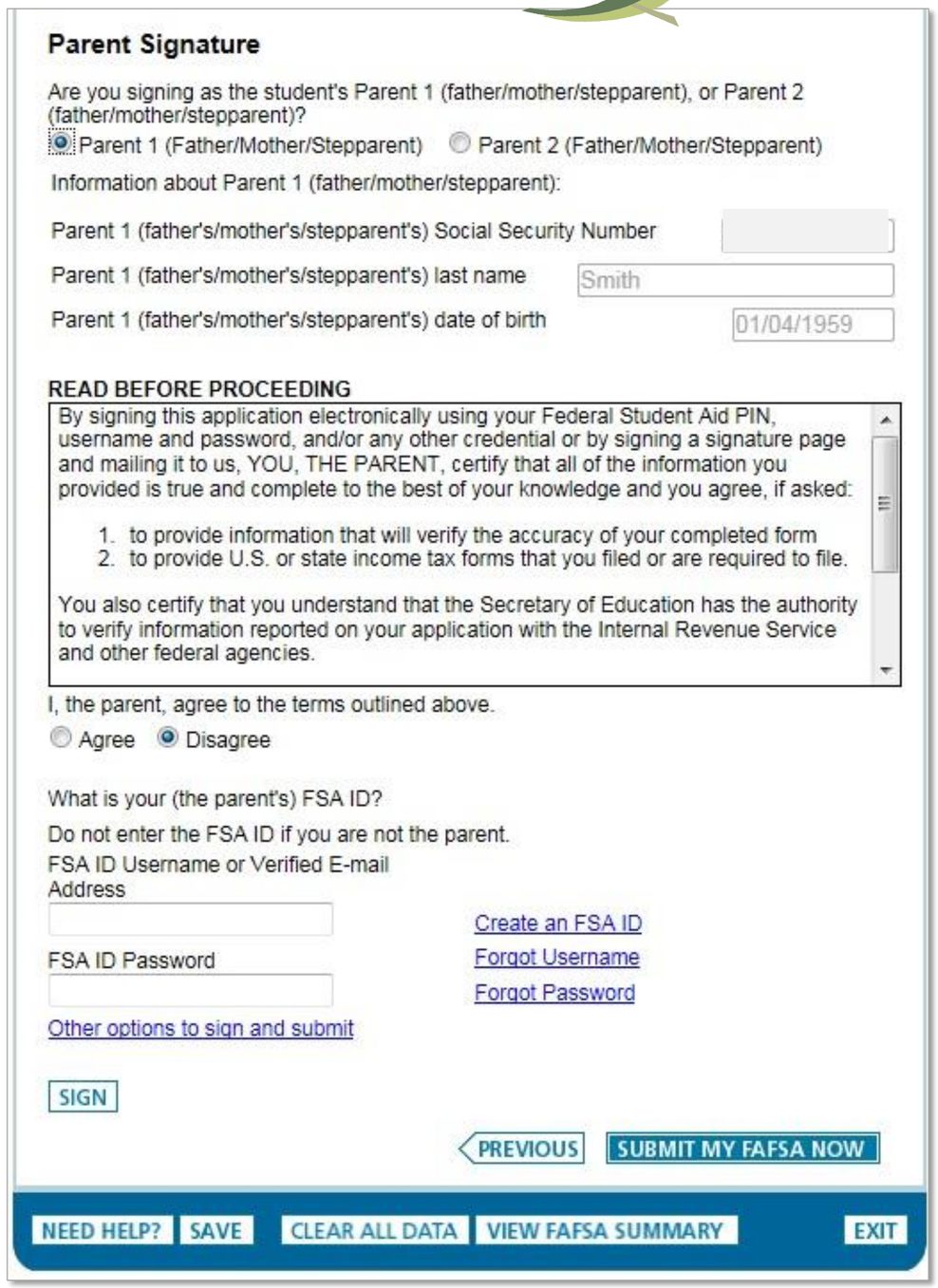
Sign and Submit (Parent)

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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Step 7:
Confirmation

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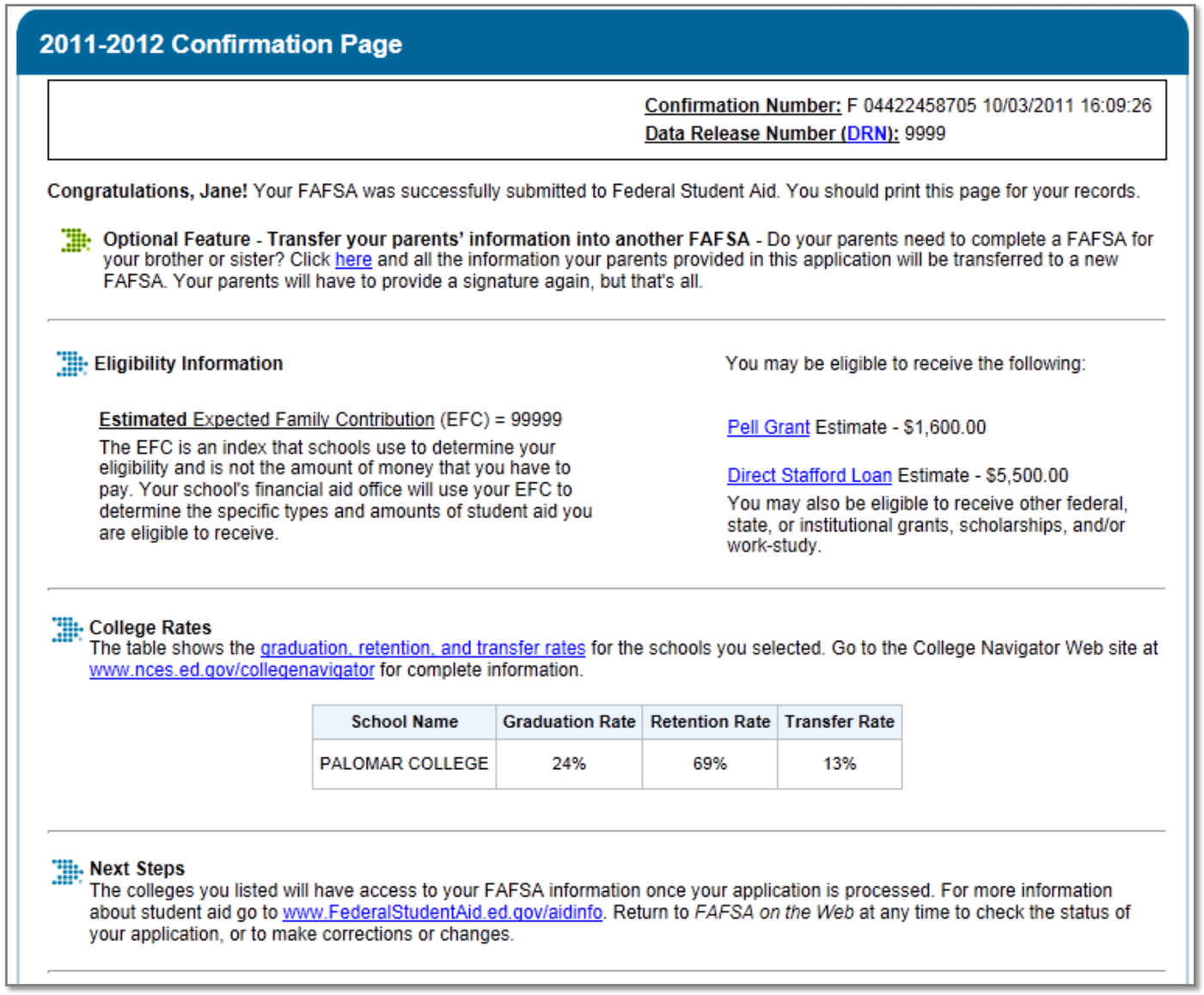
Confirmation Page

- Confirmation number
- Data Release Number (DRN)
- Optional feature: transfer FAFSA data
- Eligibility information
- College information
- Next steps



2011-2012 Confirmation Page

Confirmation Number: F 04422458705 10/03/2011 16:09:26
Data Release Number (DRN): 9999

Congratulations, Jane! Your FAFSA was successfully submitted to Federal Student Aid. You should print this page for your records.

Optional Feature - Transfer your parents' information into another FAFSA - Do your parents need to complete a FAFSA for your brother or sister? Click here and all the information your parents provided in this application will be transferred to a new FAFSA. Your parents will have to provide a signature again, but that's all.

Eligibility Information

Estimated Expected Family Contribution (EFC) = 99999
The EFC is an index that schools use to determine your eligibility and is not the amount of money that you have to pay. Your school's financial aid office will use your EFC to determine the specific types and amounts of student aid you are eligible to receive.

You may be eligible to receive the following:

Pell Grant Estimate - $1,600.00

Direct Stafford Loan Estimate - $5,500.00
You may also be eligible to receive other federal, state, or institutional grants, scholarships, and/or work-study.

College Rates
The table shows the graduation, retention, and transfer rates for the schools you selected. Go to the College Navigator Web site at www.nces.ed.gov/collegenavigator for complete information.

School Name	Graduation Rate	Retention Rate	Transfer Rate
PALOMAR COLLEGE	24%	69%	13%

Next Steps
The colleges you listed will have access to your FAFSA information once your application is processed. For more information about student aid go to www.FederalStudentAid.ed.gov/aidinfo. Return to *FAFSA on the Web* at any time to check the status of your application, or to make corrections or changes.

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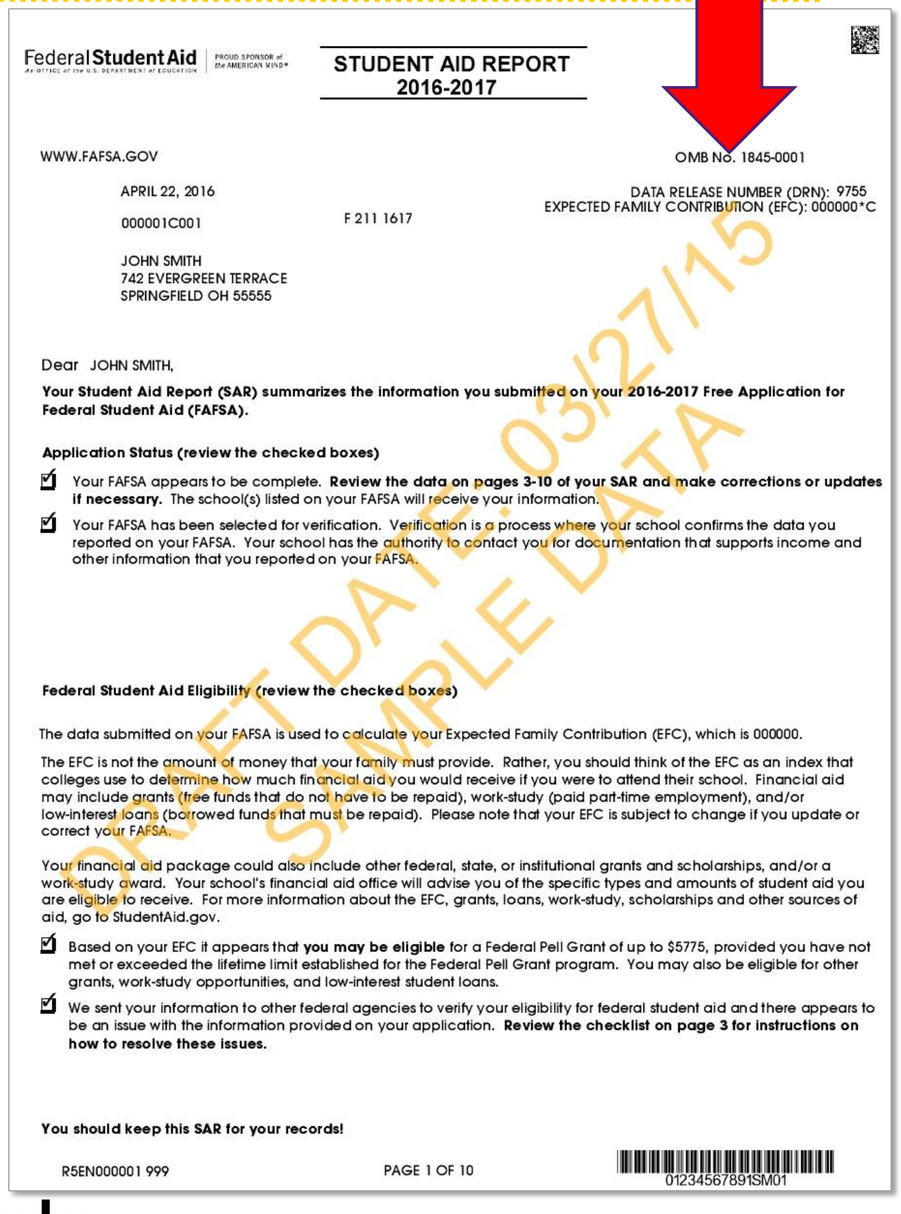
Student Aid Report (SAR) and Acknowledgement

- 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 send SAR to additional schools



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STUDENT AID REPORT
2016-2017

WWW.FAFSA.GOV

OMB No. 1845-0001

APRIL 22, 2016

DATA RELEASE NUMBER (DRN): 9755
EXPECTED FAMILY CONTRIBUTION (EFC): 000000*C

000001C001

F 211 1617

JOHN SMITH
742 EVERGREEN TERRACE
SPRINGFIELD OH 55555

Dear JOHN SMITH,

Your Student Aid Report (SAR) summarizes the information you submitted on your 2016-2017 Free Application for Federal Student Aid (FAFSA).

Application Status (review the checked boxes)

- ☑ Your FAFSA appears to be complete. **Review the data on pages 3-10 of your SAR and make corrections or updates if necessary.** The school(s) listed on your FAFSA will receive your information.
- ☑ Your FAFSA has been selected for verification. Verification is a process where your school confirms the data you reported on your FAFSA. Your school has the authority to contact you for documentation that supports income and other information that you reported on your FAFSA.

Federal Student Aid Eligibility (review the checked boxes)

The data submitted on your FAFSA is used to calculate your Expected Family Contribution (EFC), which is 000000.

The EFC is not the amount of money that your family must provide. Rather, 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 their school. Financial aid may include grants (free funds that do not have to be repaid), work-study (paid part-time employment), and/or low-interest loans (borrowed funds that must be repaid). Please note that your EFC is subject to change if you update or correct your FAFSA.

Your financial aid package could also include other federal, state, or institutional grants and scholarships, and/or a work-study award. Your school's financial aid office will advise you of the specific types and amounts of student aid you are eligible to receive. For more information about the EFC, grants, loans, work-study, scholarships and other sources of aid, go to StudentAid.gov.

- ☑ Based on your EFC it appears that **you may be eligible** for a Federal Pell Grant of up to $5775, provided you have not met or exceeded the lifetime limit established for the Federal Pell Grant program. You may also be eligible for other grants, work-study opportunities, and low-interest student loans.
- ☑ We sent your information to other federal agencies to verify your eligibility for federal student aid and there appears to be an issue 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!

R5EN000001 999

PAGE 1 OF 10

01234567891SM01

DRAFT DATA 03/27/15
SIMPLE DATA

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Student Aid Report (SAR) and Acknowledgement

- 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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FAFSA Demonstration Website

fafsademo.test.ed.gov

- **Username**: eddemo
- **Password**: fafsatest
- 2016-2017 test system available **December 30th**

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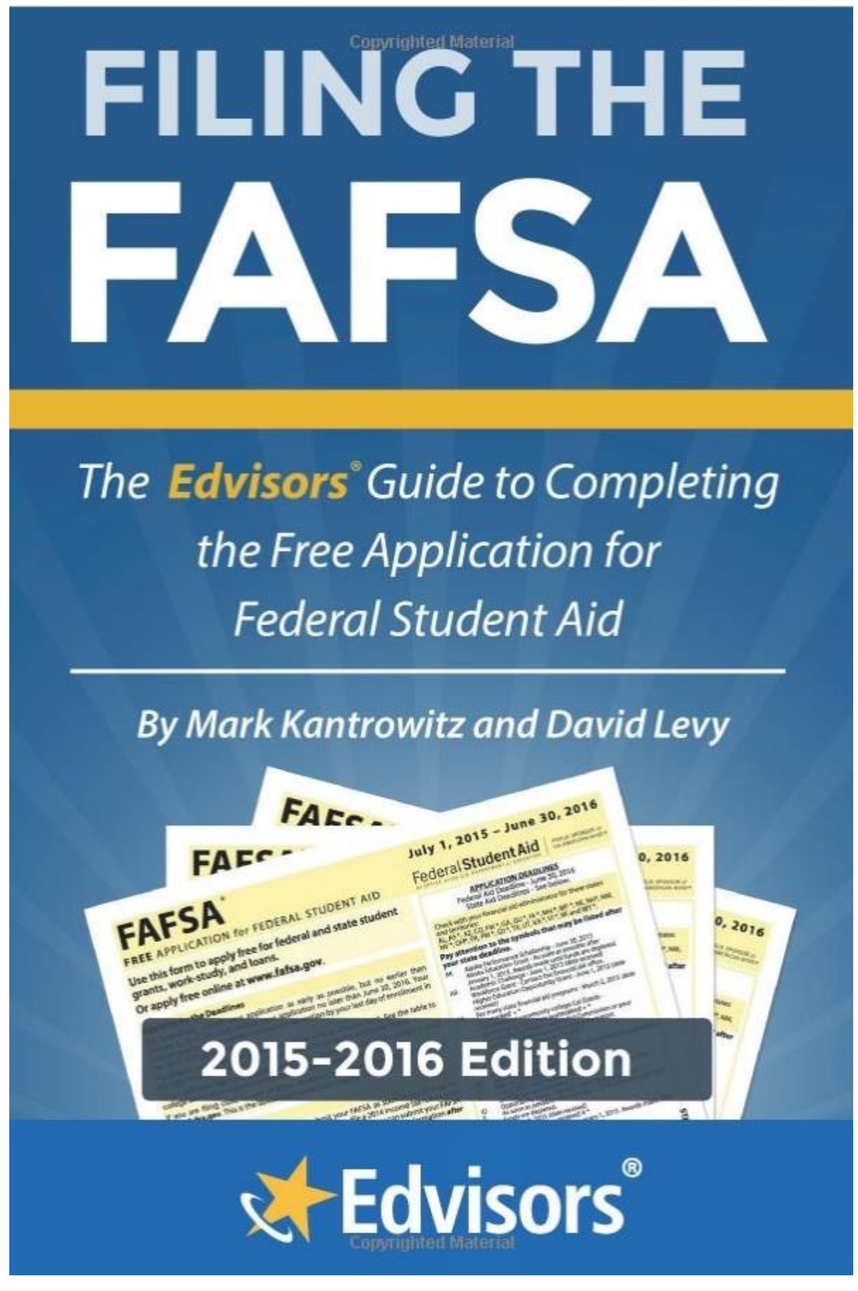
Free Book about Filing the FAFSA

- 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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