



**Early FAFSA:
The New
Golden Ticket**

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US Department of Education
CAPFAA Business Meeting, New Haven, CT
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Agenda

- FAFSA simplification efforts
- Early FAFSA and Prior-Prior Year (PPY)
- Resources
- Frequently asked questions

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Higher Education Amendments of 2008

- The Higher Education Opportunity Act (HEOA) required the Department to...
 - Collaborate with the IRS to allow for importing of tax information into the FAFSA (IRS Data Retrieval Tool)
 - Report to Congress on the status of FAFSA simplification efforts
 - Create a study group – with Congress, multiple Federal agencies, and other constituencies – to work toward making the FAFSA easier and faster to complete

Dear Colleague Letter GEN-08-12

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Progress 2008-2016

- ✓ IRS Data Retrieval Tool (DRT)
- ✓ FAFSA question skip logic
- ✓ Reduction in FAFSA completion time by two-thirds
- ✓ *FAFSA cycle open October 1 instead of January 1*
- ✓ *Use of prior-prior year financial data*



FAFSA Open October 1

IF YOU PLAN TO ATTEND COLLEGE FROM	YOU CAN SUBMIT THE FAFSA FROM	USING TAX INFORMATION FROM
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

Electronic Announcement: September 14, 2015



Why October 1?

- For many students, the current FAFSA application cycle is not aligned with college admission deadlines
- Students may be asked to make enrollment decisions before they receive information about financial aid
- Earlier FAFSA availability will give applicants more time to apply for aid and to explore their options



Prior-Prior Year

- 2017-2018 FAFSA will collect tax year 2015 income data
 - Other data, such as household and asset information, will be *current / projected*

Electronic Announcement: March 18, 2016



Prior-Prior Year

2017-18 FAFSA Question Number (Student/Parent)	Question
32/80	Tax Return Status (already completed, will file, not going to file)
33/81	Type of Tax Return
34/82	Tax Filing Status (single, married filing jointly, married filing separately, etc.)
35/83	Eligible to File a 1040A, 1040EZ
36/85	Adjusted Gross Income
37/86	U.S. Taxes Paid
38/87	Number of Exemptions
39/40 (student/spouse), 88/89 (parent 1/parent 2)	Income Earned from Work
44/93	Exclusions from income
45/94	Untaxed Income



Not Prior-Prior Year

No changes to data elements unrelated to the tax return

2017-18 FAFSA Question Number (Student/Parent)	Question	Timeframe
102/84	Dislocated Worker	As of Date of FAFSA Completion
95/73	Number in Household	Projected for Award Year
96/74	Number in College	Projected for Award Year
41/43 (student/spouse), 90/92 (parent 1/parent 2)	Assets	As of Date of FAFSA Completion
97/101	Receipt of Certain Means-tested Benefits	Calendar Years 2015 or 2016



Why Prior-Prior Year?

- Using prior-prior year data is expected to reduce the use of estimated income, and increase the use of the IRS Data Retrieval Tool (DRT)
- As the IRS DRT is used more frequently, Verification burden is reduced for schools and families
- For several years the college community and some legislators have asked ED to begin using earlier tax information on the FAFSA

10



Early FAFSA Resources

- [IFAP Early FAFSA Information Page](#)
 - [Dear Colleague Letters](#)
 - [Electronic Announcements](#)
 - [Q & A documents](#)
 - [Webinars and other training](#)
 - [Other resources](#)

EarlyFAFSAFeedback@ed.gov

11



Early FAFSA Resources

The screenshot shows the IFAP website layout with several sections:

- Hot Topics:** Program Integrity Information, Questions and Answers; Federal Student Aid Data Center; Disaster Assistance; Security Resources - SANS; Data Protection.
- Informational Pages:** Data for All; General Enrollments; 1099 Direct Subsidized Loans; Campus-Based Programs; Federal Incentives; Federal Schools; Loan Servicing and Collection; HEAL Program.
- Letters & Announcements:** Policy and
- What's New section:** The most recent postings to the site are listed in the What's New section.
- Tools for Schools:** Click on this box to access online and computer-based training resources.
- Worksheets, Schedules, & Tables:** Click on this box to access worksheet, schedule, and table resources.
- Publications:** Click on this box to access program-related and processing-related publications.
- Processing Resources:** Click on this box to access program and system processing information and materials.

12



Early FAFSA Resources: Counselors

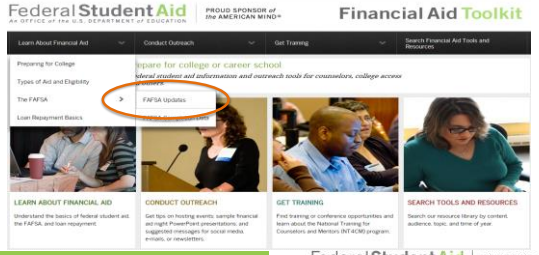
- *Financial Aid Toolkit website*
 - *Suggested outreach text and fact sheets*
 - *Social media tools and infographics*
 - *Other resources*
- *Training in person and by webinar*

FinancialAidToolkit.ed.gov

13



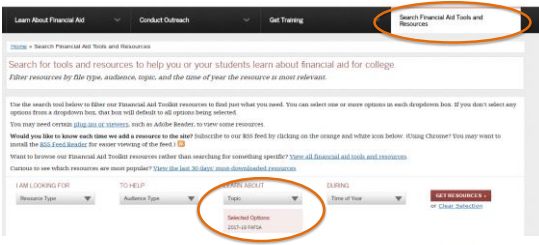
Early FAFSA Resources: Counselors



14



Early FAFSA Resources: Counselors



15



Issues

- How will students know about these changes?
 - Email campaign to FAFSA renewers, websites and social media, outreach to schools and partners, fact sheets for counselors and applicants
- May Professional Judgment be exercised more often?
 - This is possible given that one year or more may have passed between 2015 and the FAFSA filing date
 - School eligibility will not be at risk if proper documentation is retained
 - Professional Judgment flag should be set on the ISIR

Dear Colleague Letter GEN-16-03

16



Issues

- Will systems be ready to accommodate the changes?
 - Department systems will be ready, and we are working actively with software providers to facilitate their providing updates to schools
- Will states be changing deadlines for their aid programs?
 - A number of states are expected to shift financial aid application deadlines, most by simply *allowing*, but not requiring, earlier application submissions

Electronic Announcement: May 6, 2016

17



Issues

- How are responsibilities for performing Verification and resolving conflicting information impacted?
 - The Verification process will be simplified, and some documentation (e.g., tax return transcripts) will be able to be used for 2016-2017 and 2017-2018
 - The Department will systematically identify applications that contain conflicting information between 2016-2017 and 2017-2018, and flag for resolution only those where student eligibility is likely to be impacted

*Early FAFSA Q&As G-8 and G-9
Dear Colleague Letter GEN-16-07*

18



Other Issues

- Pell award schedules and Campus-Based awards
- Monitoring Pell Lifetime Eligibility and Direct Loan aggregate limits on NSLDS and the ISIR

19



Other Issues

Are we expected to award financial aid earlier?

20



Thank you!

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21



We Appreciate Your Feedback

To ensure quality training we ask all participants to please fill out an online session evaluation:

<https://www.surveymonkey.com/s/ZacharyGoodwin>

This evaluation tool provides a means to inform us of areas for improvement, and to support an effective process for listening to our customers.

Additional feedback about training can be directed to joann.borel@ed.gov.

22



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23



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Research and Customer Care Center

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fsa.customer.support@ed.gov



Reach FSA

855.FSA.4FAA -- 1 number to reach 10 contact centers!

Campus Based Call Center eZ-Audit
COD School Eligibility Service Group
CPS/SAIG Foreign Schools Participation Division
NSLDS Research and Customer Care Center
G5 Nelnet Total & Permanent Disability Team

24



Questions?



25

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