


FAFSA Changes

- Colors – Green Pantone 390 CVU & Purple Pantone 263 CVU
- All year references have been incremented
- IRS tax form references updated
- Added spaces between the month, day and year boxes
- Ovals to circles
- Removed the comma separating the thousands place in income and asset fields
- New fields added because of CCRAA
- Worksheet changes
- Some instructions moved from the 'Note' pages to the application
- Added and reordered dependency status questions



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FAFSA Changes

Selective Service Registration (Q. 22)

- One response
- 1= Register me

Coursework Necessary for Teaching (New) (Q. 32)

Veterans Benefit Question Changes (Q. 44 & 45)

- Will you receive Veterans Education Benefits between 7/1/2009 & 6/30/2010? (question 44) Skip, 45 if 'no'
- What type of Veterans Benefits will you receive?
 - 1=Montgomery GI Bill Active Duty (Chapter 30)
 - 2=Post 9/11 GI Bill (Chapter 33)
 - 3=Montgomery GI Bill Selected Reserve (Chapter 1606)
 - 4=Reserve Educational Assistance Program (Chapter 1607)
 - 5=Vocational Rehabilitation and Employment (Chapter 31)
 - 6=Dependents' Educational Assistance (Chapter 35)
 - 7=Any other type of veterans education benefits
 - Blank

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FAFSA Changes

Worksheet Changes

- Eliminated worksheets & moved data elements to the body of the FAFSA
- Deleted
 - Worksheet A – Eliminated Data
 - Worksheet B – Broken into individual questions (Untaxed Income)
 - Worksheet C – Broken into individual questions (Additional Financial Information)
- Added for Student & Parent - Additional Financial Information (Old Worksheet C)
 - Educational Credits (Q. 46a & 94a)
 - Child Support (Q. 46b & 94b)
 - Need-Based Employment (Q. 46c & 94c)
 - Grant/Scholarship Aid (Q. 46d & 94d)
 - Combat Pay (Q. 46d & 94d)

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FAFSA Changes

Worksheet Changes

- Added for Student & Parent - Untaxed Income (Old Worksheet B)
 - Pension Payments (Q. 47a & 95a)
 - IRA Payments (Q. 47b & 95b)
 - Child Support Received (Q. 47c & 95c)
 - Interest Income (Q. 47d & 95d)
 - IRA Distributions (Q. 47e & 95e)
 - Untaxed Pensions (Q. 47f & 95f)
 - Military/Clergy Allowances (Q. 47g & 95g)
 - Veterans Non-Education Benefits (Q. 47h & 95h)
 - Other Untaxed Income (Q. 47i & 95i)
 - Other Non-Reported Money (Student only Q. 47j)
- CCRAA Eliminated 'Foreign Income Exclusions' & 'Special Fuel Credits' from Worksheet B

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FAFSA Changes

Added 5 new Dependency Status Questions

- As of today, are you an emancipated minor as determined by a court in your state of legal residence? (Q. 56)
- As of today, are you in legal guardianship as determined by a court in your state of legal residence? (Q. 57)
- At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless? (Q. 58)
- At any time on or after July 1, 2008, did the director of an emergency shelter program funded by the U.S. Department of Housing & Urban Development determine that you were an unaccompanied youth who was homeless? (Q. 59)
- At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? (Q. 60)

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FAFSA Changes

CCRAA extended the time period for Federal Means Tested Benefits as a criteria for SN and Auto zero (Q. 77- 81 parents & 98-102 student)

In 2007 or 2008, did you, your parents or anyone in your parents' household (from question 75) receive benefits from any of the federal benefits programs listed? Mark all the programs that apply. Answering these questions will not reduce your eligibility for student aid or these other benefits.

77. Supplemental Security Income 78. Food Stamps 79. Free or Reduced Price Lunch 80. TANF 81. WIC

In 2007 or 2008, did you (or your spouse) or anyone in your household (from question 98) receive benefits from any of the federal benefits programs listed? Mark all the programs that apply. Answering these questions will not reduce your eligibility for student aid or these other benefits.

98. Supplemental Security Income 99. Food Stamps 100. Free or Reduced Price Lunch 101. TANF 102. WIC

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FAFSA Changes

- Added Parents' email address to PDF application (Q. 71)
- New Dislocated Worker question
CCRAA mandates that Dislocated Workers are eligible for Simplified Needs Test & Auto Zero calculations (Q. 85 & 103)
- CCRAA changes how 529 College Savings Plans are reported
 - 2008-09 – Dependent students were instructed, to not include the value of an account he or she owned
 - 2009-10
 - If dependent, instructed to report the value of student-owned accounts as parental investment & also report any accounts owned by the parent for any member of the household (Q. 92)
 - 2009-10 – If independent, Student must report as assets any accounts they own (Q. 42)

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Key Changes

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Key Changes

Special Circumstances

- Prior to 09-10 dependent students unable to provide parental data had to complete the 'paper' application
- FOTW edits have been modified to bypass parental data
- Dependent students can submit FOTW without parental data
- Detailed information provided to students on what qualifies them for a Special Circumstance
- Students advised to contact their FAA
- **FAA retains sole authority for Dependency Override determination**
- No EFC calculated on these transactions

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Key Changes

Special Circumstances

- New Special Circumstance Flag added to the ISIR
 - 1 = Dependent record submitted without parental data
 - Comment code 295, refers student to FAA
 - Dependency Status 'X' (Rejected Dependent)
 - Rejects 2 (income questions blank) and 15 (Parent signatures missing)
 - 2 = Dependent record initially submitted without parental data but corrected to include
 - Comment code 296, noting the addition of parental data
 - If no other rejects, the EFC is calculated
- Existing process for Dependency Override still exists

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Key Changes

Special Circumstances Indicator

3 CPS issues

- Navigation issue on FOTW
 - SCI set to '1' and comment 295 is there
 - Parental data on the application
- SCI not getting reset to 2 when parental data is added
- SCI set on initial application
 - Then changed one of the dependency questions making them independent
 - SCI did not changed to '2' and comment 295 is there

EFC is calculated

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Key Changes

Dependency Overrides 08-09

- FAA determines on a case by case basis
- FAA must retain supporting documentation
- Must verify each year
- Prior to 09 -10 DO could not transfer from one school to another

Dependency Override Performed By Another Schools 09-10

- CCRAA provided for a school to award Title IV aid based on another schools DO determination **within the same award year**
- As in prior years DO cannot be carried over from one year to the next
- Subsequent years FAA must reaffirm that the override is still justified and document
- DO transactions will not automatically be sent to all school choices
 - School must have DRN
 - Submit a correction with DRN and School code; or
 - Student can add the school to the DO transaction through Corrections on the web
 - New Comment code 284, indicating the transaction is a result of a DO

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Key Changes

Unsubsidized Stafford Flexibility

- FAA has discretion to award a dependent student unsubsidized Stafford without parental data on the FAFSA
- FAA must verify
 - Parent refuses to complete FAFSA
 - Signed statement from parent
 - Parent is not supporting student and date they last supported the student
 - Parent or a third party
 - May also want to document how the student will support themselves
 - Parent may not borrow under Plus
- Not considered Dependency Override
- Professional Judgment

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Key Changes FOTW

Incomplete Web Application Notification

- Encourage students to complete the process
- Initial notification after 7 days
- Follow up notification at 14 days
- Notifications in language of the incomplete application
- Notifications either email or postal

Dependency Status Questions

- Dependency status questions reorder with the questions most frequently answered yes first
- Allows applicant to skip all other dependency questions when they answer a question 'yes'

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Key Changes

FAFSA on the Phone (FOTP)

- Non-web, paperless alternative
- Student relays information to FSAIC customer support 800-4-FED-AID (800-433-3243)
- Applicant given a confirmation #
- Applicant receives SAR in 7-10 days, which must be signed & returned mail
 - New comment code 285
 - Reject 16
- For applicants who have no internet access & federal deadline approaching

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CPS Processing System Changes

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Central Processing System Changes

- Institutional Student Information Record Changes (ISIR)
 - Record length increased from 3175 to 3700 bytes
 - Reordered to include new FAFSA items & deletions & other changes already discussed
 - Date increments

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Central Processing System Changes

Institutional Student Information Record Changes (ISIR)

- Transaction Data Source & Application Data Source/Type Code (Field # 162 & 189)
 - Added U=PDF, V=Spanish PDF, & 6= FAFSA on the Phone records)
 - 4U=PDF Application
 - 4V=Spanish PDF Application
 - 6A=FAFSA on the phone
 - 6B=Spanish FAFSA on the phone
 - 6E=EZ FAFSA on the phone
 - 6F=Spanish EZ FAFSA on the phone
- New Comment Code 285 – FAFSA on the phone & signature reject 16

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Central Processing System Changes

Institutional Student Information Record Changes (ISIR)

- New Comment Codes 286, 287, & 288 – If Parents', Dependent Student, or Independent Student's Additional Financial Information is unusually high and assumed zero
- New Comment Codes 289 to 294 – TEACH Grant Overpayment contact information to resolve overpayment
 - Edits not new just the comment codes

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Central Processing System Changes

Institutional Student Information Record Changes (ISIR)

- Revised Housing Plans value (Q. 104b, 104d, 104f, 104h, & six web)
 - Reversed the meaning of values 2 & 3
 - Requested by FAAs
 - Students were not reading any further when they got to 'Off Campus'
 - More commuters than off campus, therefore more accurate data
 - » 1=On Campus
 - » 2=With Parent
 - » 3=Off Campus

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Central Processing System Changes

Institutional Student Information Record Changes (ISIR)

- Increased the length of Correction, Highlight, and Data Verify Flags
 - 45 bytes each
 - Necessary because of new fields

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Central Processing System Changes

Database Matches - NSLDS

- Two New Loan Status Codes
 - FX – Fraudulent loans that are resolved
 - PZ – Plus loans taken by parent for student who has since died
- Up to 3 TEACH Grant Detail Records (& Additional TEACH Grant flag)
 - NSLDS TEACH Grant School Code
 - NSLDS TEACH Grant Transaction #
 - NSLDS TEACH COD Grant Last Update Date
 - NSLDS TEACH Grant Scheduled Award Amount
 - NSLDS TEACH Grant Amount Paid to Date
 - NSLDS TEACH Grant Award Amount
 - NSLDS TEACH Grant Academic Year Level
 - NSLDS TEACH Grant COD Sequence Code
 - NSLDS TEACH Grant Award Year
 - NSLDS TEACH Grant Loan Conversion Flag

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Central Processing System Changes

Database Matches – NSLDS

- TEACH Grant Overpayment & School code of Reporting Institution
- NSLDS Post-Screening Reason Code
 - 19=TEACH Grant converted to a loan
- TEACH Loan Flags
 - Grant to loan conversion flag & change flag
- TEACH Loan Code 'D8'
- TEACH Loan Information
 - Total
 - Aggregate Undergrad/Post Baccalaureate Disbursement Amount
 - Aggregate Graduate Disbursement Amount

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Central Processing System Changes

Warning Edits Produce 'Highlights'

- New TEACH Grant edit triggers highlight & comment 283 when web applicant leaves the 'Teacher Coursework' question blank
- Enhanced TEACH Grant edit triggers highlight & comment 281 when the 'Teacher Coursework' question response is 'Don't know'
- Deleted the edit that generated comment 282 for a paper filer. Comment 282 alerted paper filers of the availability of TEACH Grant

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Central Processing System Changes

Need Analysis (CCRAA)

- Increase in Income Protection Allowance
- Increase in the threshold for Auto Zero from \$20,000 to \$30,000
- Extension of the months from 12 to 24 for means tested benefits to qualify for Simplified Need and Auto Zero calculations
- Addition of the Dislocated worker status as condition for Auto Zero & Simplified Need

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Central Processing System Changes

Need Analysis (CCRAA) Simplified Need

- If one the following are true
 - Need based means test in the last 24 months
 - Dislocated worker
 - Type of tax return is 1040A or EZ or eligible to file 1040A
 - Will not file a tax return
- And AGI < \$50,000 (If AGI blank then sum of income earned from work < \$50,000)

Need Analysis (CCRAA) Auto Zero

- If one the following are true
 - Need based means test in the last 24 months
 - Dislocated worker
 - Type of tax return is 1040A or EZ or eligible to file 1040A
 - Will not file a tax return
- And AGI < \$30,000 (If AGI blank then sum of income earned from work < \$30,000)

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Other Important Information

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Other Important Information

- When conducting manual secondary confirmation with DHS (Form G-845), always list the 15 digit confirmation # returned from DHS on initial match
 - Electronic announcement 08/01/2008 & 03/06/2009
- ED will be conducting a small pilot match with IRS
 - At some point???
 - FOTW Applicants will be asked for their consent to do the match
 - Advantage is that there are no changes to the IRS code needed to do this match
 - Data may be passed on the ISIR???

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Other Important Information

- New SSN Match Code '6'
 - Not verified
 - Reject 18
 - Same resolution required as match code '1' (No match on SSN)
 - Correct SSN
 - File new application
 - If the SSN is correct, contact SSA
- Deleted comment codes
 - 163, 247, 248, 249, 250
 - All referred to Worksheet A

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HEOA Impact 09-10

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HEOA

Year Round Pell (Effective July 1, 2009)

- Up to 2 scheduled Pell Grants during an award year
- 1st award – any enrollment status
- Beyond 1st – must be enrolled at least ½ time
- Maximum 18 semesters or equivalent (Effective July 1, 2008)

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HEOA

Term Based

Year Round Pell (Effective July 1, 2009)

Scheduled Award \$4000, Student Full time

Summer 2009 \$2000 First scheduled Award	Fall 2009 \$2000 First Scheduled Award	Spring 2010 \$2000 Second Scheduled Award	Summer 2010 \$2000 Second Scheduled Award
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200% 2009-10 Award Year

Scheduled Award \$4000, Mixed enrollment

Summer 2009 ½ time \$1000 First Scheduled Award	Fall 2009 Full time \$2000 First Scheduled Award	Spring 2010 Full time - \$2000 ½ First Scheduled Award ½ Second Scheduled Award
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125% 2009-10 Award Year

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HEOA

Clock Hour

Year Round Pell (Effective July 1, 2009)

Scheduled Award \$4,000 – 1500 Clock Hour program

July-September 450 hours/13 weeks \$2000	October- December 450 hours/13 weeks \$2000
January – February 300 hours/8 weeks \$1250	March – April 300 hours/8 weeks \$1250

160% 2009-10 Award Year

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HEOA

Year Round Pell (Effective July 1, 2009)

- COD will store a single award
- New indicator 'Additional Eligibility Indicator (AEI) must be 'true' for eligible students
 - Sent with initial award or as adjusted award as appropriate
 - Send additional disbursement as appropriate
 - If AEI is 'false', COD will edit award up to 100% of scheduled award
 - If AEI is 'true', COD will edit the award up to 200% of scheduled award and reject anything over

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HEOA

Zero EFC for Dependents of Deceased Military
(Effective 09 -10 Award Year)

- Provides for maximum Pell for student who are otherwise Pell eligible (including eligible EFC)
- Parent or guardian in the armed forces and died as a result of military service in Iraq or Afghanistan after 09/11/2001

AND

- Student was less than 24, or enrolled at the time of the parent or guardian's death

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HEOA

Zero EFC for Dependents of Deceased Military
(Effective 09-10 Award Year)

- School creates the award record
- If the school determines the student is eligible, they update the 'Post 9-11 Deceased Veteran Dependent Indicator' on the COD website
 - Not included in Common Record for 09-10
 - Only COD can remove
- COD recalculates scheduled award
- School adjusts the award and disbursement data as appropriate through normal means
- Web acknowledgement with warning edit and new scheduled award

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Important Reminders

Student Making Corrections on the Web

- To complete corrections to the application data, the student must provide his or her PIN or signature.
- If the student is dependent and is changing parental data, a parent PIN or signature must also be provided.

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Processing System Schedule

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Central Processing System Schedule

August 12, 2008 – Need Analysis Specification posted to IFAP

October, 2008 – EDE Technical Reference posted to IFAP

October, 2008 – Schools can begin ordering FOTW worksheets from FSAPubs.org

November 1, 2008 – 2009-2010 Federal School Code List available on IFAP.ed.gov

November 5, 2008 – Electronic Announcement – Students should update their mailing and email addresses by January 11, 2009 to get the Renewal Reminder

November 12, 2008 – 2009-2010 SAR Comment Codes & Text posted on IFAP

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Processing System Schedule

November 24, 2008 - 2009-2010 ISIR Guide posted to IFAP

November 18, 2008 – 2009-2010 School Electronic Process Guide posted to IFAP

November 5, 2008 – 2009-2010 Student Web Application Products Process Guide posted to IFAP

November 17, 2008 – 2009-2010 EFC Formula Guide posted to IFAP

December, Early – 2009-2010 PDF versions of FAFSA & FAFSA on the web worksheet available

December 14, 2008 - 2009-2010 FOTW Demonstration site available at fafsademo.test.ed.gov (user name - 'eddemo' & password - 'fafsatest')

December, Late – ED begins shipping orders for FOTW worksheet

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Processing System Schedule

January 2, 2009 – CPS begins processing 2009-2010

January 11, 2009 – Corrections must be made to 2008-2009, for student to receive renewal reminders (corrections for renewal eligibility can continue, but no reminder will be sent)

April, 2009 – 2009-2010 ISIR Analysis Tool available

June 30, 2009 – Deadline for 2008-2009 FAFSAs

September 17, 2009 – Deadline for 2008-2009 Corrections

June 30, 2010 – Deadline for 2009-2010 FAFSAs

September 17, 2010 – Deadline for 2009-2010 Corrections

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FAS STAFF

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