

FAFSA Overview

Agenda

1. Free Application for Federal Student Aid (FAFSA) Overview
2. Alternative Application for Illinois Financial Aid Overview
3. 21-22 FAFSA Updates

FAFSA Overview

Snapshot Theory

- A FAFSA is considered to be a “snapshot” of a family’s financial situation as of the date an application is submitted



Expected Family Contribution (EFC)

- The FAFSA/Alternative App will generate a number called the EFC
- The EFC determines students' eligibility for certain types of state and federal financial aid
- The EFC is the amount that a family can be expected to contribute towards a student's college costs
 - Not a lump sum
 - Reflects the family's expected ability to pay over an academic year



2021-22 FAFSA

WHEN

- As soon as possible after October 1st
(Check with colleges for specific deadlines)

WHO

- High school seniors and college students
- U.S. citizens and eligible non-citizens

HOW

- Available online at www.fafsa.gov

WHY

- Determines eligibility for federal and state aid programs
- Some institutions use it to award institutional aid

Information Needed for the 21-22 FAFSA

- **Social Security Number** – Be sure it is correct!
- **Alien Registration Number** – if the student is not a U.S. citizen.
- **Records of income** – 2019 Federal Income Tax Return (1040), W-2s, other records of income earned from work, business, child support paid or received, and any other untaxed income.
- **Information about investments** – Savings, certificates of deposit, stock options, bonds, 529 plans and other college savings programs, and investment real estate, business, and farms.
- **An FSA ID to sign electronically**

Note: A student must report parental information until the age of 24 unless they meet the criteria to file as an independent student as determined by the FAFSA.

Dependency Status

Dependent

- Students that answer “No” to all dependency questions
 - Student information
 - Parent Information

Independent (additional information may be required)

- Students are considered dependent until age of 24 unless they can answer “Yes” to one of the dependency questions
 - Student Information
 - Spouse Information, if married

Parent Information

- Most students must report parental information until the age of 24
- For financial aid purposes, there are only three types of parents:
 - Biological parents
 - Adoptive parents
 - Stepparents (if married to biological parent)
- Legal guardians are not considered parents for financial aid purposes
- If parents are divorced, report information about the parent the student lived with most in the past 12 months

Benefits of FOTW/myStudentAid App

Quick	<ul style="list-style-type: none">• Instant confirmation page• Student Aid Report (SAR) sent within 48-72 hours
Easy	<ul style="list-style-type: none">• Detailed help screens guide the student through every question• Skip logic is used to reduce unnecessary questions
Accurate	<ul style="list-style-type: none">• Inconsistent answers are flagged so the student can correct mistakes before submitting the application
Safe	<ul style="list-style-type: none">• Encryption keeps the student's information safe

FOTW/myStudentAid App Sections

Section 1	Student Demographics
Section 2	School Selection
Section 3	Dependency Status
Section 4	Parent Demographics
Section 5	Parent Financials
Section 6	Student Financials
Section 7	Sign and Submit
Section 8	Confirmation

Auto-Populated Fields on Renewal FAFSA

Student Section	Parent Section
<ul style="list-style-type: none">• Name• Address• Social Security Number• Date of Birth• Telephone Number• Driver's License Information• E-mail Address• Citizenship Status• Alien Registration Number• Marital Status• State of Legal Residence• Male or Female• High School Completion Status	<ul style="list-style-type: none">• Level of Degree• Active Duty Military• Veteran• Children• Other Legal Dependents• Orphan or Ward of Court• Emancipated Minor• Legal Guardianship• Dependency Override <ul style="list-style-type: none">• Last Name• First Initial• Social Security Number• Date of Birth• Marital Status• Highest Level of Education• E-mail Address• State of Legal Residence

IRS Data Retrieval Tool

- Allows you to transfer your tax data onto the FAFSA



Link to IRS

The screenshot shows the "Get My Federal Income Tax Information" form. The title is "Get My Federal Income Tax Information" with a sub-note: "See our Privacy Notice regarding our request for your personal information." Below the title, it says "Enter the following information from your 2018 Federal Income Tax Return." and "All fields are required unless marked otherwise." The form contains several input fields: "First Name", "Last Name", "Social Security Number" (with a note "No input required"), "Date of Birth" (with a calendar icon), "Filing Status" (with a dropdown arrow), "Street Address" (with a note "Must match your 2018 Federal Income Tax Return"), "PO Box" (with a note "Required if entered on your tax return"), "Apartment Number" (with a note "Required if entered on your tax return"), "Country" (with a dropdown arrow set to "United States"), "City, Town or Post Office", "State / U.S. Territory" (with a dropdown arrow set to "Select One"), and "ZIP Code". At the bottom, there is a "SUBMIT" button and a small disclaimer: "By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties."

Look up tax data

The screenshot shows the "2018 Federal Income Tax Information" page. It has the IRS logo and navigation links "Return to FAFSA | Help | Logout". The main heading is "2018 Federal Income Tax Information". Below this, it says: "Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions. For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form. The data retrieved from your tax return is limited to the items listed below as you reported to the IRS." There is a table with three columns: "Tax Year", "Type of Return Filed", and "Untaxed Portion of IRA Distributions & Pensions/Annuities". The rows include: "Adjusted Gross Income", "Tax-exempt Interest Income", "Social Security Number", "Income Earned from Work", "IRA Deductions and Payments", "Filing Status", "Income Tax", and "Status of Amended Returns Received". Below the table, it says: "Refer to your tax records if you have a question about the values you reported." There are two sections: "Transfer My Tax Information into the FAFSA Form" and "Do Not Transfer My Tax Information and Return to the FAFSA Form". Each section has a "TRANSFER NOW" or "DO NOT TRANSFER" button with a question mark icon.

Transfer to FAFSA

Federal Student Aid ID (FSA ID)

- The FSA ID is your electronic signature for the FAFSA
- An FSA ID is needed to use the IRS DRT
- Students and parents must each have their own FSA ID
- You will need your FSA ID to renew the FAFSA every year

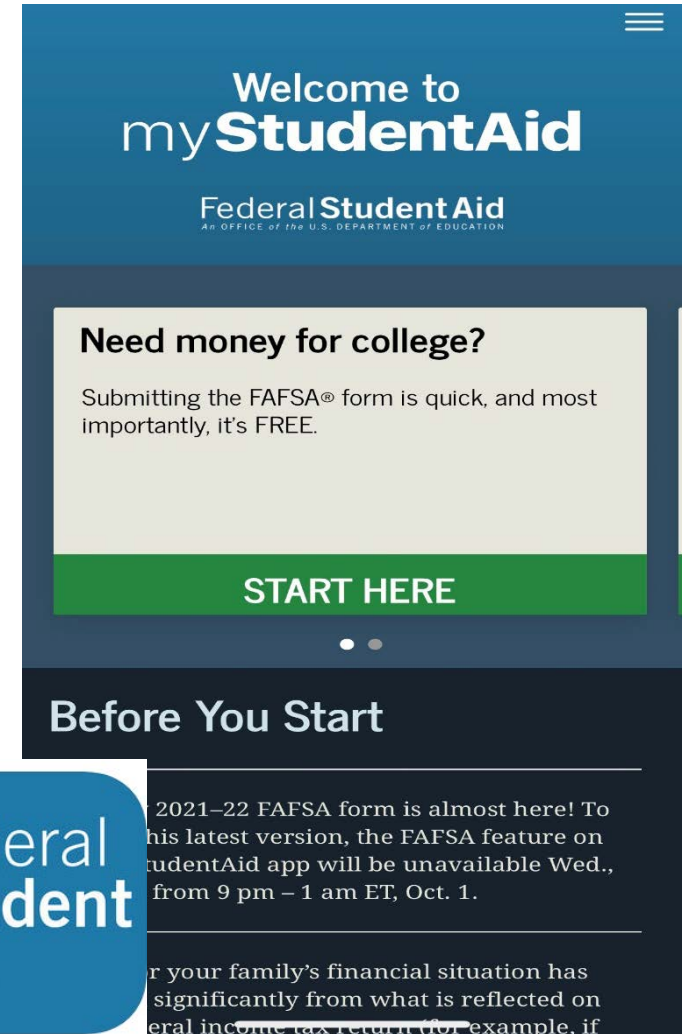
Note: Parents who do not have a SSN cannot obtain an FSA ID but can print a signature page instead

FSA ID Requirements

- Username
- Password
- Challenge questions

myStudentAid App

- Mimics much of the functionality of FOTW
 - Order of sections
 - Save and Help features
 - IRS DRT feature
- User **MUST** have an FSA ID in order to login
 - Parents without an FSA ID will be unable to sign and submit using the app
- Customized experience based on the role the user selects



Paper FAFSA

- Available in English and Spanish
- Includes instructions on pages 1-2 and notes on pages 9-10
- Takes 7-10 days to process from the date it was mailed

FAFSA®

FREE APPLICATION for FEDERAL STUDENT AID

Use this form to apply free for federal and state student grants, work-study, and loans.
Or apply free online at fafsa.gov.

Apply by the Deadlines

For federal aid, submit your application as early as possible, but no earlier than October 1, 2019. We must receive your application no later than June 30, 2021. Your college must have your correct, complete information by your last day of enrollment in the 2020-2021 school year.

For state or college aid, the deadline may be as early as October 2019. See the table to the right for state deadlines. You may also need to complete additional forms. Check with your high school counselor or a financial aid administrator at your college about state and college sources of student aid and deadlines.

If you are filling close to one of these deadlines, we recommend you file either online at fafsa.gov or via the myStudentAid mobile app. These are the fastest and easiest ways to apply for aid.

Use Your Tax Return

We recommend that you complete and submit your FAFSA form as soon as possible on or after October 1, 2019. The easiest way to complete or correct your FAFSA form with accurate tax information is by using the IRS Data Retrieval Tool either through fafsa.gov or the myStudentAid mobile app. In a few simple steps, most students and parents who filed a 2018 tax return can transfer their tax return information directly into their FAFSA form.

If you (or your parents) have missed the 2018 tax filing deadline of April 2019, and still need to file a 2018 income tax return with the Internal Revenue Service (IRS), you should submit your FAFSA form now using estimated tax information, and then you must correct that information after you file your return.

Note: Both parents or both the student and spouse may need to report income information on the FAFSA form if they did not file a joint tax return for 2018. For assistance with answering the income information questions in this situation, call 1-800-4-FED-AID (1-800-433-3243).

Fill Out the FAFSA Form

If you or your family experienced significant changes to your financial situation (such as loss of employment), or other unusual circumstances (such as tuition expenses at an elementary or secondary school or high unreimbursed medical or dental expenses), complete this form to the extent you can and submit it as instructed. Consult with the financial aid office at the college(s) you applied to or plan to attend.

For help in filling out the FAFSA form, go to StudentAid.gov/completefafsa or call 1-800-433-3243. TTY users (for the hearing impaired) may call 1-800-730-8913.

Fill the answer fields directly on your screen or print the form and complete it by hand. Your answers will be read electronically; therefore, if you complete this form by hand:

- use black ink and fill in circles completely: Correct Incorrect
- print clearly in CAPITAL letters and skip a box between words: 1 S E L M S T
- report dollar amounts (such as \$12,356.41) like this: \$ 1 2 3 5 6 . 4 1 0 0

Change is for student information and purple is for parent information.

Mail Your FAFSA Form

After you complete this application, make a copy of pages 3 through 8 for your records. Then mail the original of pages 3 through 8 to:
Federal Student Aid Programs, P.O. Box 7650, London, NY 40742-7650.

After your application is processed, you will receive a summary of your information in your Student Aid Report (SAR). If you provide an e-mail address, your SAR will be sent by e-mail within three to five days. If you do not provide an e-mail address, your SAR will be mailed to you within three weeks. If you would like to check the status of your application, go to fafsa.gov or call 1-800-433-3243.

Let's Get Started!

Now go to [page 3](https://fafsa.gov) of the FAFSA form and begin filling it out. Refer to the notes on [pages 9](https://fafsa.gov) and [10](https://fafsa.gov) as instructed.

July 1, 2020 – June 30, 2021

Federal Student Aid 2020-2021

U.S. DEPARTMENT OF EDUCATION

Pay attention to any symbols listed after your state deadline. States and territories not included in the open listing below:
AL, AS, AZ, CA, HI, IL, IN, IA, KS, KY, LA, MA, MD, MI, MN, MO, NC, ND, NE, NH, NJ, NM, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, VA, VT, WA, WI, WV, and WY.**

State Deadline

State	Deadline
AK	Alaska Performance Scholarship – June 30, 2020 # 5 Alaska Education Grant # 5
AR	Academic Challenge – June 1, 2020 (date received) Workforce Grant #
CA	Higher Education Opportunity Grant – June 1, 2020 (date received) For many state financial aid programs – March 2, 2020 (date received) # * For additional community college Cal Grants – September 2, 2020 (date received) # *
CT	Contact the California Student Aid Commission or your financial aid administrator for more information. February 15, 2020 (date received) # **
DC	FAFSA form completed by May 1, 2020 # For DC, MA, complete the DC OneApp and submit supporting documents by May 21, 2020 #
DE	April 15, 2020 (date received)
FL	May 15, 2020 (date received)
IA	July 1, 2020 (date received) – Earlier priority deadlines may exist for certain programs. #
IL	Opportunity Grant – March 1, 2020 (date received) # **
IN	Roller to the Illinois Student Assistance Commission web site for the Minority Award Program (MAY) renewal deadline. # 5
KS	Grant of Merit – April 15, 2020 (date received) 21st Century Scholarship – April 15, 2020 (date received) Adult Student Grant # 5 – New applicants must submit additional forms. Workforce Ready Grant #
LA	April 1, 2020 (date received) # **
MA	July 1, 2021 (July 1, 2020 recommended)
MD	May 1, 2020 (date received) #
MI	March 1, 2020 (date received)
MN	May 1, 2020 (date received)
MO	March 1, 2020 (date received)
MS	30 days after term starts (date received)
NC	February 3, 2020 # Applications accepted through April 1, 2020 (date received)
ND	April 30, 2020 (date received) # *
NE	June 1, 2020 (date received)
NH	December 1, 2019 # **
NJ	2019-2020 Tuition Aid Grant recipients – April 15, 2020 (date received) All other applicants: Fall and spring terms – September 15, 2020 (date received) Spring term only – February 15, 2020 (date received)
NV	Renewable Promise Scholarship – April 1, 2020 # 5 Silver State Opportunity Grant # 5 All other aid #
NY	June 30, 2021 (date received) #
OH	October 1, 2020 (date received)
OR	OSU Private Scholarship – March 1, 2020 # Oregon Promise Grant – Capital State agency # Oregon Opportunity Grant # 5
PA	All first-time applicants awarded to a community college, business/health/technical school, hospital school of nursing, designated Pennsylvania Open Admission institution, or non-transferable two-year program – August 1, 2020 (date received) All other applicants – May 1, 2020 (date received) #
SC	Tuition Grants – June 30, 2020 (date received) SC Commission on Higher Education Need-based Grants # 5 State Grant – Prior year recipients receive award if eligible and apply by February 1, 2020. All other awards made to new applicants. # Savannah Promise – February 1, 2020 (date received) State Lottery – Fall term, September 1, 2020 (date received); spring and summer terms, February 1, 2021 (date received)
TX	January 15, 2020 # *
VA	Private and low-year institutions may have different deadlines. # PRIORITY Scholarship – March 1, 2020. New applicants must submit additional forms. Contact your financial aid administrator or state agency. WV Higher Education Grant Program – April 15, 2020
WV	February 15, 2020 (date received)

Additional forms may be required. ** No more available after October 1, 2019.
* Check with your financial aid administrator. ** For priority consideration, submit by date specified.
Accessible only for those who are eligible. ** Additional accommodations to assist with printing.

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STATE DEADLINES

17

Paper FAFSA Sections

Step 1 Student Information

Step 2 Student Financials

Step 3 Dependency Status

Step 4 Parent Information & Financials

Step 5 Independent Student Information

Step 6 School Selection & Housing Preferences

Step 7 Signatures

Alternative Application for Illinois Financial Aid Overview

The Alternative App

- Determines a student's MAP Grant eligibility
- Patterned after the FAFSA
- Only available online
- Available in English and Spanish
- Pre-screening questions help students determine eligibility
- Financial information must be manually reported
- Students can only list Illinois MAP approved institutions on the application
- A PIN is needed to electronically sign and submit the application

ALTERNATIVE
APPLICATION
FOR ILLINOIS
FINANCIAL AID

Intended for qualifying
undocumented and
transgender students

RISE Act: Eligible Students

- The law defines Illinois resident, as “any person who is deemed an Illinois resident for tuition purposes”.
- The individual must have:
 - Resided with parent or guardian while attending an Illinois public or private high school;
 - Graduated from a public or private high school or received the equivalent of a high school diploma in Illinois;
 - Attended school in Illinois for at least 3 years as of the date they graduated from high school or received the equivalent of a high school diploma;
 - Provides the institution with an affidavit stating that the individual will file an application to become a permanent resident of the United States at the earliest opportunity the individual is eligible to do so; and
 - Has not established a residence outside of Illinois.

2021-22 Alternative App

WHEN

- As soon as possible after October 1st
(Check with colleges for specific deadlines)

WHO

- High school seniors and college students
- Eligible undocumented students and transgender students disqualified from federal financial aid

HOW

- Alternative App: www.isac.org/alternativeapp

WHY

- Determines eligibility for the MAP Grant
- Some institutions use it to award institutional aid

Information Needed for the 21-22 Alternative App

- **Student Profile for the Alternative App**– ISAC ID number will be assigned to student after profile is created
- **Student and Parent email address (for dependents)**– Be sure parent and student each have their own email address
- **Records of income** – 2019 Federal Income Tax Return (1040), W-2s, other records of income earned from work, business, child support paid or received, and any other untaxed income.
- **Information about investments** – Savings, certificates of deposit, stock options, bonds, 529 plans and other college savings programs, and investment real estate, business, and farms.
- **A PIN to sign electronically**

Note: A student must report parental information until the age of 24 unless they meet the criteria to file as an independent student as determined by the Alternative Application for Illinois Financial Aid .

Alternative App PIN

- A PIN is needed to sign the Alternative App electronically
- Students and parents must have their own PIN
- The PIN will be generated and sent via email by ISAC
- A PIN is needed every time you renew the Alternative App
- To obtain a PIN, parents only need to provide an email

21-22 FAFSA Updates

21-22 FAFSA Updates & Major Changes

- 21-22 FAFSA will release on October 1, 2020
 - FAFSA demo site for 21-22 FAFSA will be available on September 30, 2020 at www.fafsademo.test.ed.gov
- Major changes to 21-22 FAFSA:
 - Income threshold for automatic zero increased to \$27,000 for 21-22 award year
 - Schedule 1 question changes (questions 35 & 82 on 21-22 FAFSA)
 - Question about whether a Schedule 1 was filed will automatically be answered if the IRS DRT is used
 - Current exceptions for filing a Schedule 1 updated
 - “Capital Gains” removed as an exception
 - “Virtual Currency” added as an exception

FAFSASM Demo Site

- This site is available in English and Spanish

URL

<http://fafsademotest.ed.gov>

User Name

eddemo

Password

fafsatest

PD Webinar Series CE and CPDU Requests

- To request **Continuing Professional Development Units (CPDU)** an *ISBE Evaluation* must be completed and emailed to isac.outreachtraining@Illinois.gov along with your **Illinois Educator Identification Number (EIN)**
- To request a **Certificate of Attendance (CE)** an *ISAC Evaluation* must be completed and emailed to isac.outreachtraining@Illinois.gov
- To access both the ISAC and ISBE Evaluations visit the registration link for the webinar and select “View Event Materials”
 - The registration link can be found in the Webex reminder email for today’s webinar or by accessing www.isac.org/pd/webinars.html and selecting “Register Now” for today’s webinar

Date	Time*	Topic	Register
Tuesday, 9/1/2020	1 – 2 PM	FAFSA Mandate Information & Resources	REGISTER NOW
Tuesday, 9/15/2020	1 – 2 PM	Alternative Application Overview	REGISTER NOW
Tuesday, 9/29/2020	1 – 2 PM	FAFSA Overview	REGISTER NOW
Tuesday, 10/13/2020	1 – 2 PM	Impacts of COVID-19 on Financial Aid	REGISTER NOW
Tuesday, 10/27/2020	1 – 2 PM	Overview of the Financial Aid Process	REGISTER NOW
Tuesday, 11/10/2020	1 – 2 PM	Working with Special Student Populations	REGISTER NOW
Tuesday, 11/24/2020	1 – 2 PM	Overview of State Aid Programs	REGISTER NOW
Tuesday, 12/8/2020	1 – 2 PM	Overview of ISAC Services & Resources	REGISTER NOW

Thank You!

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