MEMORANDUM

UTAH SYSTEM OF
HIGHER EDUCATION

February 7, 2023

FAFSA Overview and Simplification Act Update

The Free Application for Federal Student Aid, or the FAFSA, is the gateway to various college financial aid opportunities, such as Pell Grants, scholarships, federal work-study opportunities, and subsidized and unsubsidized federal student loans. However, the FAFSA has more applicable uses as it gives access to state aid (e.g., the Opportunity and Utah Promise scholarships), institutional aid (i.e., scholarship requirements), and in many cases, is a requirement for private scholarships. Students are not required to accept any types of aid that they do not wish to use (such as student loans). Although the FAFSA does not guarantee access to all funding above, nor do all students qualify for the aid and scholarships, it is the first step seniors should take in high school to cover college costs. Therefore, the FAFSA is fundamental to the Affordability pillar of the Board's Strategic Plan.

Significant changes are being made with the FAFSA application that will directly affect students, high school professionals, institutions, and our state. These changes come from federal legislation, specifically the Future Act and the FAFSA Simplification Act. The Future Act was passed in 2019, mandating Federal Student Aid to directly use data from the IRS and transfer it to the FAFSA and to expand this direct transfer of data to more categories of people. The FAFSA Simplification Act was passed in 2020 and was included in the Consolidated Appropriations Act to simplify the FAFSA process for students nationwide. While complete changes to the new application are not live yet, we have some information regarding some major changes. Many of those changes will affect the FSA ID account creation and security, and the entirety of the FAFSA form. Some of those changes include the following:

- Reducing the number of questions and the calculation of the FAFSA's Expected Family Contribution (EFC), which will now be called the Student Aid Index (SAI).
- The new FAFSA will expand access to IRS information for the majority of student situations. It will allow for two methods of determining Pell eligibility, which is from the new SAI formula or the Federal Poverty Tables. Although Pell eligibility will increase, other changes can drastically change the aid options for some students and families.
- Overall, this new FAFSA should allow for a smoother process for most students. However, it is anticipated that some students may experience more challenges.

In preparation for these changes, we are preparing training, best practices, and new initiatives to assist high school professionals and access advisers in helping students complete a FAFSA form. We anticipate that a major hurdle with the FAFSA simplification will be the FSA ID process for students and parents.

Therefore, we are looking for ways to complete the FSA ID earlier to avoid delays with the application. In addition, we are informing our professionals now to attend our different trainings beginning in the early fall, which will inform them of the upcoming changes before the FAFSA opens on the tentative date of October 1. These trainings will include a full FAFSA Simplification overview, a "How to Host a FAFSA Night and Best Practices," a case study practice of the new FAFSA, and additional webinars.

Commissioner's Recommendation

This is an information item only; no action is required.

Attachment(s)

1. Annual FAFSA Volunteer Report Fall 2022 – see PDF attachment
2. NASFAA Presentation January 2023 for the upcoming FAFSA Simplification changes – see PDF attachment
3. Some private scholarships that require the FAFSA:
   - ACS Scholars Program: https://www.acs.org/education/acs-scholars/apply.html
   - One Refugee Scholarship: https://www.onerefugee.org/apply-now
   - Beyond the Boroughs Scholarship: http://www.beyondtheboroughs.org/the-scholarship/scholarship-requirements/
   - Daniels Fund Scholarship: https://www.danielsfund.org/scholarships/daniels-scholarship-program/overview
   - APIA Scholarship Program: https://apiascholars.org/scholarship/apia-scholarship/
   - Hispanic Scholarship Fund Scholar Program: https://www.hsf.net/scholarship
   - Donald and Barbara Mozley Scholarship: https://www.sae.org/participate/scholarships/donald-and-barbara-mozley-scholarship-junior
   - Leap Scholarship: https://www.usu.edu/latinx/leap-scholarship or https://leapcv.org/
   - McDonald's HACER National Scholarship: https://www.mcdonalds.com/us/en-us/community/hacer.html
   - The Gates Scholarship: https://www.thegatesscholarship.org/scholarship

2022 Utah FAFSA Night Volunteer Annual Report

January 2023

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2022 FAFSA Volunteers

This year we had the most volunteers assisting at FAFSA events ever recorded in the state!

We want to say **THANK YOU** to the **185 individual volunteers** who contributed their time and talents to our high schools' 2022 FAFSA Night events. Added up, you all provided approximately 1000 volunteer hours combined. Your efforts have taken FAFSA events to the next level this year and we cannot thank you enough.

Your contribution outside of your normal work day makes our FAFSA Nights a success. Utah's high school counselors, students, and their families are grateful for your dedication to assisting them. From our FAFSA survey shared at all the events, we received hundreds of comments from students and families saying how grateful they were for your help. Each of your contributions has made a major impact on the number of events, students, and FAFSA applications completed this past fall. These efforts make a difference for our students who need that access to financial aid and who are looking for ways to pay for college.

Thank you to the following financial aid offices and student-centered organizations that provided volunteers for the 2022 FAFSA Events:

- Brigham Young University Financial Aid
- Mountainland Tech Financial Aid
- Southwest Tech Financial Aid
- Utah College Advising Corps (UCAC)
- Utah Valley University GEAR UP

- Davis Tech Financial Aid
- Salt Lake Community College Financial Aid
- Tooele Tech Financial Aid
- Utah State University Financial Aid (including regional campuses)
- Utah Valley University TRIO

- Dixie Tech Financial Aid
- Snow College Financial Aid
- United Way of Salt Lake
- Utah Tech University Financial Aid
- Weber State University Financial Aid

- GEAR UP Utah
- Southern Utah University Financial aid
- University of Utah Financial Aid
- Utah Valley University Financial Aid
- Westminster College Financial Aid
- WSU Advocates for FAFSA

Utah FAFSA Completion Update

2023-2024 FAFSA Cycle

This year we have broken out of our pandemic shell and have taken off to new heights! **We have conducted the most FAFSA high school events ever sponsored by the USHE Office.** The efforts of organizing these events were joined with Utah College Application Week events as a strategic move to stimulate growth. Thus, resulting in the majority of our FAFSA events being hosted during the month of October. Although this unintentional shift of events conducted during October has been difficult for many, it has accelerated our FAFSA completion early in the year. Our hope is that this causes a snowball effect for the remainder of the school year.

F A F S A

4,195 students
attended a FAFSA event in the Fall of 2022

According to the
National College
Attainment Network
10,147
seniors completed a FAFSA through 12/09/2022

73% of students
reported that they finished during or shortly after attending a FAFSA event.

154
FAFSA Nights took place fall of 2022, with 6 more events pending in the spring.

32% of students
who participated in a FAFSA Night are first-generation college students

According to the
National College
Attainment Network
18.9%
of seniors have completed a FAFSA through 12/09/2022

FAFSA Night Evaluations: Survey and Grading

Thank you to those who gave feedback and grades to your volunteered FAFSA Night events.

This feedback, paired with feedback from students and parents, was shared as a "report card" to those hosting the events in the high schools. Allowing them to get positive feedback, celebrate their successes, and provide some ideas for improvements for the next school year. Not all schools received this report due to a variety of reasons (not enough information, very poor grades, etc.) but we sent out eighty-four reports to the schools thanks to your evaluations! Below are a couple of examples of what the schools received.

2022 FAFSA Night Feedback Report Card

Overall Event Grade

A

School: Hunter High School
- Students and families in attendance (approx.): 91
- Percent of the senior class in attendance: 16%
- FAFSA completion within week of the event: 46

Subjects	Grade	Volunteer Rubric
Overall FAFSA Event Grade	A	The event was well-organized and successful. I would highly recommend that others participate in this event next year.
Resources	A	The school was prepared and provided plenty of instruction to guide families throughout the event. Handouts were also available.
Staff Involvement and Assistance	A	High school staff were fully present and led the event. They guided families on where to go, helped with technology needs, and assisted with questions.
Technology	A	Computers were ready and accessible for families, websites needed were unblocked, the internet worked, and there were plenty of computers for the event.
Preparation and Completion	A	Nearly all students and families were well prepared for the event with the necessary documents, and they were able to complete the FAFSA.

Positive feedback from volunteers, students, and families

- Hunter had an excellent turnout. Lots of fun and energetic students and parents. It was a great night. Very rewarding.
- I liked how we were rewarded for completing the FASFA because it was a positive experience and the volunteers were very helpful to answer any questions that we had no matter how confusing or straightforward the questions were.

Ideas to implement next year

- One idea is to have an additional area (in addition to the computer lab) where students and families who bring their own computers can work on the FAFSA. This may help with spreading things out for an event as large as yours.

As a reminder, if you are looking for ideas to improve your event in any way please check out our Best practices document.

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2022 FAFSA Night Feedback Report Card

Overall Event Grade

A

School: Granger High School
- Students and families in attendance (approx.): 88
- Percent of the senior class in attendance: 11%
- FAFSA completion within week of the event: 45

Subjects	Grade	Volunteer Rubric
Overall FAFSA Event Grade	A	The event was well-organized and successful. I would highly recommend that others participate in this event next year.
Resources	A	The school was prepared and provided plenty of instruction to guide families throughout the event. Handouts were also available.
Staff Involvement and Assistance	A	High school staff were fully present and led the event. They guided families on where to go, helped with technology needs, and assisted with questions.
Technology	A	Computers were ready and accessible for families, websites needed were unblocked, the internet worked, and there were plenty of computers for the event.
Preparation and Completion	B	The majority of students and families were well prepared for the event with the necessary documents, and they were able to complete the FAFSA.

Positive feedback from volunteers, students, and families

- Having dinner was such a great touch. The handouts were comprehensive and also in Spanish. The space facilitated the night well and the staff was prepared for printing needs.
- The space was accessible and easy to find, which I did not see at other schools. I appreciated that there was a volunteer check-in process and a link to fill out our information. Monica was welcoming to families and students. Food and drinks were a plus as many families expressed coming directly from work.

Ideas to implement next year

- One idea is to have a printer more easily accessible for families that need to mail a signature, having one that is in the same room as the event or close to it is a good option.

As a reminder, if you are looking for ideas to improve your event in any way please check out our Best practices document.

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"Luckily the volunteers had the patience to help me through the steps and make sure that I'm doing each step right mostly on the money part. They were really helpful and I am grateful that they were there to help me through the FAFSA process."
- Granger High student, 11/9/2022

"I love the volunteers they helped so much. They provide many details easily. I'm glad they were able to offer this night because if I had to do it myself I would of been lost."
- Dixie High student, 10/6/2022

"I loved how the volunteers were there for my questions at all times. Also, how they were able to adequately give me relevant suggestions to my issues."
- Timpview High student, 10/19/2022

"The volunteers around the room I found very helpful. Any time I looked like I was struggling or did have a question they were right there to help. They answered all of my questions."
– Fremont High student, 10/21/2022

CONTACT US

We want to hear from you!

If you haven't reported about the events you attended, please share your experience with us! We have a <u>short survey</u> you can fill out to provide that feedback.

We would be happy to hear how the events went!

Questions?

If you have questions about FAFSA Nights, please contact the USHE FAFSA State Coordinator:

Dyllen Cafferty
dyllen.cafferty@ushe.edu
801-646-4562

Thank You!

UTAH SYSTEM OF HIGHER EDUCATION

FAFSA SIMPLIFICATION 2024-2025:

Better FAFSA Better Future

1/23/2023

CHANGES ARE COMING! ARE YOU READY?

Two pieces of federal legislation were passed that enabled the coming changes

Future Act: Expands access to federal student aid, and mandates Federal Student Aid to use data directly from the IRS-Passed December 2019

FAFSA Simplification Act included with the Consolidated Appropriations Act – Passed December 2020

Was to have started this year but an amendment moved to next FAFSA cycle

Simplifying the FAFSA

ChiefFamilyOfficer.com

FSA ID & TWO-STEP VERIFICATION PROCESS

FSA ID CHANGES

In July 2022, a Multi-Factor Authentication(MFA) process was added for anyone who is establishing their first FSA ID

Students and parents will be affected by this process if they are new to logging into the studentaid.gov website

Those who established an FSA ID prior to July 10 will be subjected to using MFA starting in November on a rolling basis over the next few months

Starting with the 2024-2025 FAFSA, you will not be able to access the FAFSA without an FSA ID set up prior to starting the form. EVERYONE NEEDS ONE!

SUGGESTION: Host FSA ID set-up workshops for students AND parents this spring, summer but prior to October 1

FSA ID PROCESS FOR ALL USERS

- According to FSA, by the end of January 2023, EVERY person who has an FSA ID and attempts to log into studentaid.gov for any reason will be subjected to the MFA process.

- Students who have not renewed their FAFSA for next year will have this new MFA experience when they attempt to log-in and renew their FAFSA.

- It will be critical moving forward that information entered for the FSA ID match what is entered into the FAFSA. Users may receive a message to update information if different information is entered. Begin messaging to your students/parents/spouses that the data contained in the FSA ID be updated any time there is a change in address, phone number, email address, etc.

- **SUGGESTION: If your organization provides an FSA ID cheat sheet to write down all information when setting up the FSA ID, you may wish to issue an updated sheet to all those you serve that includes a field to write down any updated information they put in the FSA ID and add a field to write down the back up code provided.**

Create an Account (FSA ID)

Enable Two-Step Verification

Protect Your Account with Two-Step Verification

Whenever you sign in, we'll send a secure code to make sure it's really you. To keep your account protected, make sure your phone number and email are verified. We also suggest setting up verification using a secure authenticator app.

SMS Verification
5554324567   ⚠ Not Verified

[Verify]

Email Verification
johndoe.original@gmail.com   ⚠ Not Verified

[Verify]

Use an Authenticator App (Most Secure Option)

Use an authenticator app that you've downloaded from a mobile app store to view in-app secure codes—visible only to you—that can confirm your identity when you log in.

Learn More

⊕ Set Up an Authenticator App

[Previous]   [Continue]

Note: Setting up an
Authenticator App is
OPTIONAL but
strongly
recommended

Enable Two-Step Verification

Protect Your Account with Two-Step Verification

Whenever you sign in, we'll send a secure code to make sure it's really you. To keep your account protected, make sure your phone number and email are verified. We also suggest setting up verification using a secure authenticator app.

✓ Your verified method(s) can now be used to log in.

📱 **SMS Verification**
5554324567 ✓ Verified

✉ **Email Verification**
johndoe.original@gmail.com ✓ Verified

🔑 **Authenticator App**

✓ Verified

✓ Your authenticator app can now be used to log in.

8

Previous   Continue

Create an Account (FSA ID)

Step 7 of 7

Enable Two-Step Verification: Backup Code

> ℹ We recommend storing your backup code in a safe place.

Your backup code is a special code that lets you access your account in the event that you cannot use any other two-step verification method.

Your Backup Code Is:

CK3H1SM5MRET

☐ I have stored this backup code somewhere safe.

Previous   Continue

9

Log In

FSA ID Username, Email, or Phone

testuser001

Forgot My Username

Password

••••••••   Show Password

Forgot My Password

Log In

or

Create an Account

(No changes to the log in screen)

Two-Step Verification

You have the following two-step verification methods enabled. Select one to finish logging in.

Authenticator App (Most Secure)

Use the authenticator app you set up to use with your account to get a secure code.

Enter Code

SMS Verification

******4567

Send Code

Email Verification

jo***************@gmail.com

Send Code

Help me access my account

Two-Step Verification

Enter Secure Code

Enter the secure code we sent in a text message to your mobile phone: ******4567

Enter the secure code below

Resend code

Having Trouble? Try a different method.

Submit

or

Two-Step Verification

Enter Secure Code

Enter the secure code we sent to your email: jo****************@gmail.com

Enter the secure code below

Resend code

Having Trouble? Try a different method.

Submit

Two-Step Verification

Enter Secure Code

Open the authenticator app installed on your device to generate a secure code.

Enter the secure code below

or

Having Trouble? Try a different method.

12

Submit

Two-Step Verification

You have the following two-step verification methods enabled. Select one to finish logging in.

Authenticator App (Most Secure)

Use the authenticator app you set up to use with your account to get a secure code.

Enter Code

SMS Verification

******4567

Send Code

Email Verification

jo***************@gmail.com

Send Code

Help me access my account

Sign In a Different Way

✓ ——————— ② ———————
Enter Backup Code   Answer Challenge Questions

Answer Your Challenge Questions

To finish logging into your account, answer the questions below.

After submitting, you will be taken to your account dashboard.

What was the name of your first pet?

•••	Show Answer

In what city did your parents meet?

••••	Show Answer

Previous		Continue

BACK-UP CODES

- By the end of this month, users will be able to secure a new back-up code if they used their first one or cannot access the first one they were provided.

- If a user realizes they lost their backup code they can now go into Settings->Two-Step Verification and generate a new one. This will only work for users who can log in to their accounts.

Backup Code   ↻ Generate a New Backup Code

Your backup code lets you access your account in the event that you cannot use any other two-step verification method. Each backup code can only be used once.

FSA ID FOR THOSE WITHOUT A SOCIAL SECURITY NUMBER

- According to FSA, they are developing a process for people who do not have a social security number to be able to set up an FSA ID. For most, this will be a process to benefit our students who have undocumented parents.

- This will be necessary as everyone will need an FSA ID in order to log into the studentaid.gov website(accessing the FAFSA).

- Having an FSA ID to log into the form will also allow for an electronic signature and hopefully eliminate printing, signing and mailing a signature page.

- To date, FSA has not shared any specifics about what the process will look like or what type of information/documentation will be required to verify their identity and establish the FSA ID.

verified

FAFSA FORM & FORMULA CHANGES

NCAN

SIMPLIFICATION INCLUDES

Implementation for 2024-2025

Streamline the FAFSA Form

Expanding access to IRS information for majority of filers

Two ways to determine Pell eligibility- SAI formula or Federal Poverty Tables

Replacing the Expected Family Contribution(EFC) with the Student Aid Index(SAI)

STREAMLINING THE FORM

➢ **EVERYONE** will be required to click a permission box at the beginning of the form to allow their financial information to be transferred into the FAFSA form- including non-tax filers

➢ Process **REQUIRES** transferring of data from IRS whenever possible

➢ Very limited paths for people to manually enter their financial data-separated couples, non-US tax filers, undocumented parents

➢ Number of questions has been reduced

➢ Will confirm Non-filers which could reduce verification burden
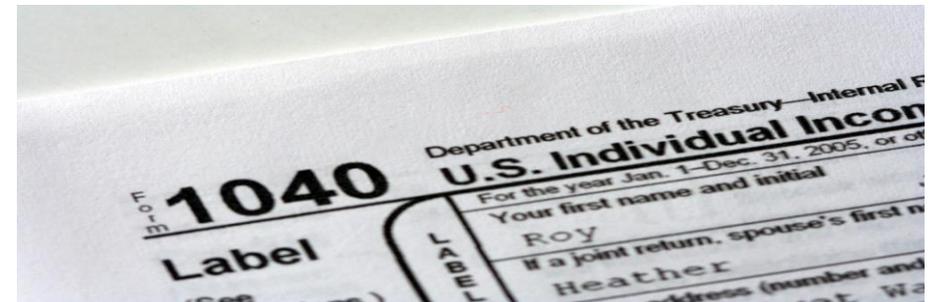
THE STUDENT AID INDEX (SAI)

New name for the **EFC**

> Better reflects the output from the FAFSA as an index, not as a reflection of what a family can or will pay

SAI could be as low as **-$1500**, allowing neediest students to receive aid in excess of the Cost of Attendance

> Non-tax filing families will receive automatic -$1500 SAI

SAI determines eligibility for all other types of federal student aid except maximum and minimum Pell awards from the Federal Poverty Tables

PELL GRANT –DETERMINING ELIGIBILITY

- Two ways to qualify for a Pell grant
- Will use federal Poverty Tables that match the income year to be reported on the FAFSA- next year 2022 income information and 2022 Poverty Table
- Pell eligibility determination:
  - Is the student eligible for Max Pell per the Poverty Table?
  - Is the student eligible for Pell by SAI?
  - Is the student eligible by Min Pell per the Poverty Table?
- Max/Min Pell is determined by family size, family composition, and AGI
  - Family composition- one or two parent household- for dependent students
  - Different tables for independent students-married or with dependents
- **Students will receive the most generous Pell Grant for which they are eligible, either by SAI or the new min/max Pell measures**

SAI FORMULA CHANGES

- Family size(not household size anymore) will be based on number of people claimed as exemptions on tax forms filed for the people being reported on the FAFSA
- Will be an option to modify that number if it no longer is an accurate reflection of family size.
- Parent info to be provided on the FAFSA will no longer be defined as primary custodial parent. New definition is "parent which provided the greater portion of the student's financial support".
- SAI will no longer be divided by number in college
- If required to report assets, the family would have to report the net value of any business or family farm —no more exemptions for number of business employees or farms on which the family residence is located

FORMULA CHANGE IMPLICATIONS

- With number in college removed from the formula-many students may have SAI double or triple with no change in family income

- Student may see reduction or loss of Pell Grant or state need-based grant

- For dependent students-income reported and family size may be for a household that they do not reside in

- Will states make any adjustments? To be seen.

- Will colleges make any adjustments for current students so to not lose enrollments?

- Families required to report assets may see large increases in SAI even though there may have been no or only a modest income change

- Enrolled college students may need to report different information than on their current FAFSA

ITEMS NO LONGER REQUIRED

- Cash support and other money paid on behalf of the student(529s in other people's names)
- Veteran's education benefits
- Workman's compensation
- Selective Service question
- Drug Conviction question
- Payments to tax-deferred pensions not on the federal tax return
- Other untaxed income sources
- Child support PAID out of the household

- NOTE: Child support received will be moved to asset section of the form-families that do not need to report assets means this won't be reported

MISCELLANEOUS QUESTION CHANGES

- Demographic survey questions will be part of the FAFSA form-not a survey at the end and will likely have expanded ethnicity and race options(over 30 choices)

- Students will be able to list up to 20 colleges on the form

- Parents/spouses will be aske to provide a full set of demographic information-full mailing address, email and phone number

- There will be no SAVE key any longer as everyone needs an FSA ID to log into the form

- Work-study earnings for students will now be a field that colleges will need to report annually in the COD system so that it can be subtracted from student income reported as that question is gone off the form

- There will be no option for independent students to provide parent information-implication for health profession students wanting to access health professions aid programs that require it

ch-ch-ch-changes

PROCESS CHANGES

PROCESS CHANGES

- Opening date for the FAFSA-NCAN and NASFAA have sent a letter to the Department to confirm what the opening date for the new form will be. The Department has stated the changes will be for the 2024-2025 FAFSA but has never committed to an opening date.

- When a student, parent or spouse logs into the FAFSA, if they do not check the "permission to transfer IRS data" box, they will be presented with a set of questions to manually enter but no SAI will be calculated. Colleges will receive an "unprocessed FAFSA" and need to contact the person to go back in and give permission or there will be no eligibility for federal aid.

- **Everyone** has to check the permission box-non-filers, people who file foreign tax returns, undocumented parents who do not file a tax form

- When a person is completing the FAFSA, the form will ask who else will contribute information to the form and request their information and email address. They will be sent a communication indicating that there is a FAFSA that needs their information.

- Pertinent parties will be labeled "contributors" for the form. To our knowledge-Parent 1 and Parent 2 references will no longer be there-may be Parent and Other Parent

- FAFSA resource materials are to be made available in multiple languages-we have no definition of which materials nor when they will be available.

MORE PROCESS CHANGES

- If a student is the first person into the form, they will be required to answer asset questions because the parent section is not completed and the system does not know if they are exempt from reporting assets. Once the parent or spouse completes their section, if they are not required to report assets, the student answers will not be used in the calculation.

- If no tax information is found at the IRS, FSA will continue to send the file for a match until a date in which the IRS indicates that tax filing is complete for that calendar year. This is more likely to affect those who file the form close to the opening date versus those who file after the date the IRS makes the indication.

- If the marital status for parents is not married but living together or the tax filing status is married filing separately, each person will be required to have an FSA ID to log in and have their financial information transferred over. This could also happen for a married students that file separately. Yes- each person will go through the FSA ID MFA process when they log in.

- The form will need to ask if the parent or student spouse is the one they were married to for the tax year being reported.

STILL MORE PROCESSING CHANGES

- FSA will need to write "business rules" for family size based on the number of exemptions that come over from the IRS. Example-Student lives with divorced parent who is not remarried. The divorce decree indicates that the non-custodial parent can claim the student and/or siblings. The custodial parent only claims one exemption. FSA will convert family size to 2(parent and student filing the form). This is a prime example of using the question to modify family size to reflect the total number of people in the student's household.

- NCAN continues to await additional information and guidance to determine if we will recommend that every student answer the alternative family size question.

- NCAN's current understanding is that any information transferred from the IRS(should be referred to as Federal Tax Information or FTI) will never be seen by the student, spouse or parent(s) in the FAFSA process-not on the screen as the transfer happens, not on final review before submitting page, or on the Student Aid Report. The questions and the "Transferred from the IRS" answers will completely disappear from the process.

- Do not reference the IRS Data Retrieval Tool with the new form. The new process is a direct transfer from the IRS-not a process where you have to enter the FSA ID in the middle of the form and have the address match what was on the tax return.

NCAN

STILL EVEN MORE PROCESSING CHANGES

- Renewal FAFSAs will bring over much more limited information due to question changes, definition of which parent belongs on the form, etc.

- When a student enters either parent demographic information or spouse information-when that person attempts to log-in with their FSA ID, it must match what the student typed in. If not, they will not get access to the form to complete their part. It will required the student to go back into their part and place the correct information that matches the parent FSA ID.

- How will completing the CSS Profile differ from the FAFSA or as it appears now. Not all answers are available. College Board has indicated that they will continue to use the number in college in the Institutional Methodology formula which creates potential for a wide variance in the federal SAI and IM calculation.

Let the new ride begin:

IMPLICATIONS & CHALLENGES WITH A NEW FORM AND PROCESS

IMPLICATIONS

- It is very likely that most or all of your resource materials related to the FSA ID or FAFSA will need to be revised. Accurate revisions may require waiting for FSA to release information and/or FSA producing updated resources for us to use.

- It is very likely that most or all of your website information related to the FSA ID or FAFSA will need to be updated when accurate information is available. Will you need or want to retain information about the 2023-2024 FAFSA as your clientele may continue to need that information if they are enrolling this fall?

- What efforts will you undertake to make sure all students, spouses and parents have an FSA ID before attempting to log in to the form? How can you include participation for undocumented parents?

- How flexible can your FAFSA Completion assistance supports be if there is any delay in the opening of the form?

- What strategies will be used at workshops or individual FAFSA completion occurrences to address the MFA process-accessing emails or texts verification codes, especially for a contributor that may not be in the room?

MORE IMPLICATIONS

- What messaging or supports will you provide to your current college students who are actually the ones who will experience the "changes" to the process and form?

- Your high school seniors and families that have never filed a FAFSA before will only know the "new" process as "the process". That is good news in that the changes will cycle out over the next few years.

- For families that experience an increase in their SAI as a result of reporting assets or the number in college not being used in the formula, what counseling strategies will you incorporate? How will you secure information about what your state aid agency is doing or if your local area colleges will make any modifications/professional judgements for these students?

- What changes, if any, will College Board make to the Profile or a simplified Profile that we understand they are developing? Will there be colleges that add completing the Profile due to a reduced amount of information coming on the FAFSA? Unintended consequence.

POTENTIAL CHALLENGES

- Timing of information and resources released by FSA – how quickly can organizations, advisors, counselors, etc. respond and prepare for and deliver FAFSA assistance?

- If there is a delayed release of the form-the rippling effects for state agencies, colleges, organizations, school districts(especially those with the FAFSA as a graduation requirement), students and families.

- Adequate training and resources-how and what will training everyone at your organization look like? How will retraining every school counselor in the country get accomplished? What collaborations can be done in your state to scale training efforts?

- What if there are flaws in the system? We have experienced system flaws in the last few years with FAFSA processing, FSA ID verifications, etc. What and how will FSA be able to address with system challenges?

- FSA has indicated that the verification process for 2024-2025 will revert to a random selection process. What percentage of students will be selected and what percentage of students you serve will be selected?

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CLOSING THOUGHTS

➢ NCAN has advocated for a simplified FAFSA for over a decade and we are thrilled to see it come to fruition.

➢ We will continue to advocate and collaborate with key partners for a smooth implementation of a new system, process and form.

➢ We are committed to our members to provide training, resources and tools so that you may assist the students and families you serve.

➢ We will be "Better Together" to deliver a "Better FAFSA Better Future"

QUESTIONS & DISCUSSION