

FAFSA[®] and Application System Processing Update

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U.S. Department of Education

Agenda

- Auto Zero (AZ) and Simplified Needs Test (SNT) Logic
- Application Updates

AZ/SNT Topics

- History
- Definitions of SNT and Automatic Zero EFC (AZ-EFC)
- Criteria for Dependent Student
- Criteria for Independent Student
- Key Data Elements
- Examples
- Scenarios
- Resources

Statutory History

- Section 479 of the Higher Education Act of 1965, as amended (HEA) – SIMPLIFIED NEEDS TEST
 - The Secretary shall develop and use a simplified application
 - Simplified Needs Test – permit family to submit only the data elements required for establishing SNT eligibility. i.e. no asset information collected
 - Automatic Zero EFC - permit family to submit only the data elements required for establishing AZ-EFC eligibility

Statutory History

Dependent Applicant

- The parents' combined AGI (for tax filers) or income earned from work (for non-filers) is less than \$50,000
- Parents filed or will file the IRS Form 1040A or 1040EZ, or were eligible to file a 1040A or 1040EZ but filed or will file a Form 1040 for no substantial reason or solely to claim an education tax credit
- One parent is a dislocated worker as defined in the Workforce Investment Act of 1998
- Anyone counted in the parents' household size received a means-tested federal benefit during the prior 24 months

Independent Applicant

- The student's and spouse's combined AGI (for tax filers) or income earned from work (for non-filers) is less than \$50,000
- Student and spouse filed or will file the IRS Form 1040A or 1040EZ, or were eligible to file a 1040A or 1040EZ but filed or will file a Form 1040 for no substantial reason or solely to claim an education tax credit
- Student or spouse is a dislocated worker as defined in the Workforce Investment Act of 1998
- Anyone counted in the student's household size received a means-tested federal benefit during the prior 24 months

So what does that mean?

- The SNT excludes assets from the Expected Family Contribution (EFC) calculation for low to moderate-income families who file simplified tax returns (1040A or 1040EZ or a tax return for Puerto Rico, Guam, American Samoa, or the Virgin Islands), meet the definition of a dislocated worker, or receive means-tested federal benefits.
- The AZ-EFC calculation is designed for low-income applicants who meet the criteria described above. The applicant will receive an EFC of zero and does not need to supply full income and asset information on the Free Application for Federal Student Aid (FAFSA).

SNT and AZ-EFC Flags in FAA Access

Total Student's Contribution (TSC):	
Parents' Contribution (PC):	
Student's Total Income (STI):	01368
Student's Allowance Against Total Income (SATI):	
Student's Income Contribution (SIC):	
Student's Discretionary Net Worth (SDNW):	
Student's Contribution from Assets (SCA):	
FISAP Total Income (FTI):	06581
Financial Aid Flags	
Auto Zero EFC Flag:	Meets criteria for Auto Zero EFC
SNT Flag:	SNT criteria were met
Pell Eligible Flag:	Eligible for a Pell Grant
Primary EFC Type:	SNT: Dependent
Secondary EFC Type:	None Calculated
EFC Change Flag:	No change

SNT and AZ-EFC Flags on the ISIR

Month 11:	
Month 12:	
Intermediate EFC Values:	
Total Income (TI):	05213
Allowances Against Total Income (ATI):	
State and Other Tax Allowance (SOTX):	
Employment Allowance (EA):	
Income Protection Allowance (IPA):	
Available Income (AI):	
Contribution from Available Income (CAI):	
Discretionary Net Worth (DNW):	
Net Worth (NW):	
Asset Protection Allowance (APA):	
Parents' Contribution from Assets (PCA):	
Adjusted Available Income (AAI):	
Total Parents' Contribution (TPC):	
Total Student's Contribution (TSC):	
Parents' Contribution (PC):	
Student's Total Income (STI):	01368
Student's Allowance Against Total Income (SATI):	
Student's Income Contribution (SIC):	
Student's Discretionary Net Worth (SDNW):	
Student's Contribution from Assets (SCA):	
ISIR Total Income (ITI):	06581
Auto Zero EFC Flag:	Meets criteria for Auto Zero EFC
SNT Flag:	SNT criteria were met
Pell Eligible Flag:	Eligible for a Pell Grant
Primary EFC Type:	SNT: Dependent
Secondary EFC Type:	None Calculated
EFC Change Flag:	No change

Dependent vs. Independent

- There is a big difference in the criteria for AZ-EFC depending on whether the applicant is dependent or independent
- [More information](http://studentaid.ed.gov/sites/default/files/fafsa-dependency.pdf)
(<http://studentaid.ed.gov/sites/default/files/fafsa-dependency.pdf>)

Dependent Student

Simplified Needs Test Criteria

- Indicate that the parents “Already completed” or “Will file” (Q80) a 1040A or 1040EZ or a tax return from PR, another U.S. territory or Freely Associated State (Q81) and their adjusted gross income (AGI) is less than \$50,000 (Q85), or
- Indicate that the parents are “Not going to file” a tax return (Q80) and their combined income earned from work is less than \$50,000 (Q88 + Q89), or
- Answer “Yes” to the parent dislocated worker question (Q84) and indicate that their AGI is less than \$50,000 (Q85), or...

Simplified Needs Test Criteria (cont.)

- Check at least one of the parent federal benefits boxes (with the exception of “None of the above”) (Q75 – 79) and indicate that their AGI is less than \$50,000 (Q85), or
- Indicate that the parents were “eligible to file a 1040A or 1040EZ” (Q83) and their AGI is less than \$50,000 (Q85)

Automatic Zero EFC Criteria

- A dependent student qualifies for an Automatic Zero EFC if the parents meet the Simplified Needs Test criteria and their AGI (tax filers) or combined income earned from work (non-tax filers) is \$24,000 or less

Independent Student

Simplified Needs Test Criteria

- Indicate that the student “Already completed” or “Will file” (Q32) a 1040A or 1040EZ or a tax return from PR, another U.S. territory or Freely Associated State (Q33) and his/her AGI is less than \$50,000 (Q36), or
- Indicate that the student is “Not going to file” a tax return (Q32) and his/her (and spouse’s) combined income earned from work is less than \$50,000 (Q39 + Q40), or
- Answer “Yes” to the student dislocated worker question (Q102) and indicate that the student’s AGI is less than \$50,000 (Q36), or

Simplified Needs Test Criteria (cont.)

- Check at least one of the student federal benefits boxes (with the exception of “None of the above”) (Q97 – 101) and indicate that the student’s AGI is less than \$50,000 (Q36), or
- Indicate that the student was “eligible to file a 1040A or 1040EZ” (Q35) and his/her AGI is less than \$50,000 (Q36)

Automatic Zero EFC Criteria

- An independent student qualifies for an Automatic Zero EFC if the student meets the Simplified Needs Test criteria and his/her AGI (tax filers) or combined income earned from work (non-tax filers) is \$24,000 or less, AND the student has dependents other than a spouse.
 - Married and number of family members greater than 2
 - Not married and number of family members greater than 1

Key Data Elements

- Student's state of legal residence (*FAFSA on the Web* only)
- Household size
- Financial information: tax filing status, type of tax return, AGI (tax filers only), income earned from work (non-tax filers only), dislocated worker status, receipt of means-tested federal benefits, and eligibility to file a 1040A or 1040EZ

Examples of Skip Logic

Note: screen shots are from 2014/2015 application.

Example #1- Dependent AZ (Skipping)

Parent Financial Information

What type of income tax return did your father file for 2013?

What was your father's adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$.00 [INCOME ESTIMATOR](#)

How much did your father earn from working (wages, salaries, tips, etc.) in 2013? This amount is the total of IRS Form 1040-lines 7+12+18.
\$.00

As of today, is your father a dislocated worker?

In 2012 or 2013, did your father receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**.

- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program ([SNAP](#))
- Free or Reduced Price Lunch
- Temporary Assistance for Needy Families ([TANF](#))
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of the above

You indicated that your father filed an IRS 1040. Was he eligible to file a 1040A or 1040EZ?

Do you want to skip the remaining questions about your and your father's income and assets?
 Yes No

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

1

#2

#3

If parent filed 1040 A/EZ, this would not display

Still one more chance to qualify

Screening question asking to skip

Example #1- Dependent AZ (Skipping)

The Parent filed a 1040 and reported income below \$24,000

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information
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Parent Financial Information

What type of income tax return did your father file for 2013?
IRS 1040

What was your father's adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$20,000 .00
[INCOME ESTIMATOR](#)

How much did your father earn from working (wages, salaries, tips, etc.) in 2013? This amount is the total of IRS Form 1040-lines 7+12+18.
\$20,000 .00

As of today, is your father a dislocated worker?
No

[CHECK FOR ERRORS](#) [PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Example #1- Dependent AZ (Skipping)

Indicate "Yes" for Dislocated Worker Indicate "No" for Dislocated Worker

Parent Financial Information

What type of income tax return did your parents file for 2013?
IRS 1040

What was your parents' adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$20,000 .00

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2013? This amount is your Parent 1 (father's/mother's/stepparent's) portion of IRS Form 1040-lines 7+12+18.
\$19,000 .00

How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2013? This amount is your Parent 2 (father's/mother's/stepparent's) portion of IRS Form 1040-lines 7+12+18.
\$1,000 .00

As of today, is either of your parents a dislocated worker?
Yes

Do you want to skip the remaining questions about your and your parents' income and assets?
 Yes No

[CHECK FOR ERRORS](#) [PREVIOUS](#) [NEXT](#)

[VIEW FAFSA SUMMARY](#) [EXIT](#)

Screening question asking to skip

Parent Financial Information

What type of income tax return did your parents file for 2013?
IRS 1040

What was your parents' adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$20,000 .00

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2013? This amount is your Parent 1 (father's/mother's/stepparent's) portion of IRS Form 1040-lines 7+12+18.
\$19,000 .00

How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2013? This amount is your Parent 2 (father's/mother's/stepparent's) portion of IRS Form 1040-lines 7+12+18.
\$1,000 .00

As of today, is either of your parents a dislocated worker?
No

In 2012 or 2013, did your parents receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**.

- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program (SNAP)
- Free or Reduced Price Lunch
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of the above

[CHECK FOR ERRORS](#) [PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Federal Benefit Questions

Demonstration of Skip Logic

Reported SNAP Benefits

Eligible 1040A or 1040EZ- Last chance

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Parent Financial Information

What type of income tax return did your parents file for 2013?
IRS 1040

What was your parents' adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$20,000 .00 [INCOME ESTIMATOR](#)

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2013? This amount is your Parent 1 (father's/mother's/stepparent's) portion of IRS Form 1040-lines 7+12+18.
\$19,000 .00

How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2013? This amount is your Parent 2 (father's/mother's/stepparent's) portion of IRS Form 1040-lines 7+12+18.
\$1,000 .00

As of today, is either of your parents a dislocated worker?
No

In 2012 or 2013, did your parents receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**.

- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program ([SNAP](#))
- Free or Reduced Price Lunch
- Temporary Assistance for Needy Families ([TANF](#))
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of the above

Do you want to skip the remaining questions about your and your parents' income and assets?
 Yes No

[CHECK FOR ERRORS](#) [PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAJSA SUMMARY](#) [EXIT](#)

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Parent Financial Information

What type of income tax return did your father file for 2013?
IRS 1040

What was your father's adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$20,000 .00 [INCOME ESTIMATOR](#)

How much did your father earn from working (wages, salaries, tips, etc.) in 2013? This amount is the total of IRS Form 1040-lines 7+12+18.
\$20,000 .00

As of today, is your father a dislocated worker?
No

In 2012 or 2013, did your father receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**.

- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program ([SNAP](#))
- Free or Reduced Price Lunch
- Temporary Assistance for Needy Families ([TANF](#))
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of the above

You indicated that your father filed an IRS 1040. Was he eligible to file a 1040A or 1040EZ?
Yes

[CHECK FOR ERRORS](#) [PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAJSA SUMMARY](#) [EXIT](#)

Parent asset questions and all student income and asset questions skipped

Taken Directly To Sign and Submit Page

Sign & Submit

Application was successfully saved.

[VIEW OR PRINT YOUR FAFSA INFORMATION](#)

Are you a [preparer](#)?
 Yes No

Student Signature

Student's Social Security Number

Student's last name Don't have a PIN? [Apply For A PIN](#)
It takes only a few minutes to get your PIN.

Student's date of birth

What is your (the student's) PIN?

[Other options to sign and submit.](#)

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN or by signing a signature page and mailing it to us, YOU, THE STUDENT, certify that you:

- will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
- are not in default on a federal student loan or have made satisfactory

Terms of Agreement - Student
 Agree Disagree

Parent Signature

Information about the Father:

Father's Social Security Number

Father's last name

Father's date of birth

What is your (the parent's) PIN?
[Apply For A PIN](#)
[I Forgot/Don't Know My PIN](#)

[Other options to sign and submit.](#)

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN or by signing a signature page and mailing it to us, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

- to provide information that will verify the accuracy of your completed form
- to provide U.S. or state income tax forms that you filed or are required to

Terms of Agreement - Parent
 Agree Disagree

Confirmation Page Shows Auto Zero

2014-2015 Confirmation Page

[PRINT THIS PAGE](#)

Confirmation Number: F 08933959907 04/30/2014 14:32:24
Data Release Number (DRN): 9999

Congratulations, test! Your FAFSA was successfully submitted to Federal Student Aid.

 **Does your brother or sister need to complete a FAFSA?** If so, you can [transfer your parents' information into a new FAFSA](#) for your brother or sister to save time. Your parents will have to provide a signature again, but that's all.

What Happens Next

- In 7-10 business days, we will mail you a Student Aid Report (SAR) notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

School(s) on your FAFSA:

School Name	Graduation Rate	Retention Rate	Transfer Rate	Additional Information from College Navigator
ADLER SCH OF PROFESSIONAL PSYCHLGY	NA	NA	NA	NA

Eligibility Information

Estimated Expected Family Contribution (EFC) = 00000

The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.

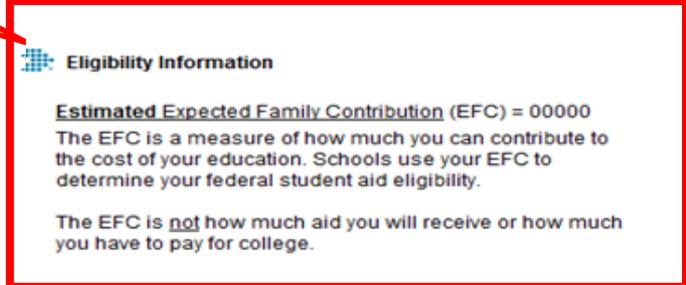
The EFC is not how much aid you will receive or how much you have to pay for college.

Based on the [eligibility criteria](#), you may be eligible for the following:

[Pell Grant](#) Estimate - \$5,730.00

[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.

Auto Zero EFC



Example #2 - Dependent AZ (No Skipping)

PARENT

Student Demographics | School Selection | Dependency Status | Parent Demographics | **Financial Information** | Sign & Submit | Confirmation

Parent Financial Information

What type of income tax return did your father file for 2013?
IRS 1040

What was your father's adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$20,000.00 [INCOME ESTIMATOR](#)

How much did your father earn from working (wages, salaries, tips, etc.) in 2013? This amount is the total of IRS Form 1040-lines 7+12+18.
\$1,000.00

As of today, is your father a dislocated worker?
No

In 2012 or 2013, did your father receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**.

- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program ([SNAP](#))
- Free or Reduced Price Lunch
- Temporary Assistance for Needy Families ([TANF](#))
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- None of the above

You indicated that your father filed an IRS 1040. Was he eligible to file a 1040A or 1040EZ?
Yes

[PREVIOUS](#) [NEXT](#)

[NEED HELP?](#) [SAVE](#) [CLEAR ALL DATA](#) [VIEW FAFSA SUMMARY](#) [EXIT](#)

Help and Hints
Parents Eligible to File a 1040A or 1040EZ?
Question 83
Select **Yes** if your parent (or both of your [parents](#) if you are reporting information for both parents):

- filed or will file a 1040 or a foreign tax return but were eligible to file a 1040A or 1040EZ
- filed a 1040 only to claim *Lifetime Learning Tax Credit* but would have otherwise been eligible to file a 1040A or 1040EZ
- filed a 1040 and were not required to file a tax return

Select **No** if either of your parents filed or will file a 1040 and were not eligible

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Answered the same as first scenario

No skipping question!

Example #2- Dependent AZ (No Skipping)

Student's Income & Assets **Very High**

STUDENT

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information
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Student Financial Information

What income tax return did you file for 2013?
IRS 1040

What was your adjusted gross income for 2013? This amount is found on IRS Form 1040-line 37.
\$999,999 .00 [INCOME ESTIMATOR](#)

How much did you earn from working (wages, salaries, tips, etc.) in 2013? This amount is the total of IRS Form 1040-lines 7+12+18.
\$151,110 .00

[PREVIOUS](#) [NEXT](#)

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Site Last Updated: Tuesday, February 25, 2014

Privacy

STUDENT

Student Financial Information continued

Enter the amount of your income tax for 2013. This amount is found on IRS Form 1040-line 55.
\$50,000 .00

Enter your exemptions for 2013. This amount is found on IRS Form 1040-line 6d.
2

Did you have any of the following items in 2013? Check all that apply and provide amounts.

Additional Financial Information

- American Opportunity Tax Credit or Lifetime Learning Tax Credit
- Child support paid
- Taxable earnings from Work-study, Assistantships or Fellowships
- Grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

Untaxed Income

- Payments to tax-deferred pension and retirement savings plans
- IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- Child support received
- Tax exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pensions
- Housing, food, and other living allowances paid to military, clergy, and others
- Veterans noneducation benefits
- Other untaxed income not reported such as workers' compensation or disability
- Money received or paid on your behalf

Confirmation Page

2014-2015 Confirmation Page

 Your confirmation page has been sent to you at the e-mail address: zelma.gonzalez@ed.gov

[PRINT THIS PAGE](#)

Confirmation Number: F 08900058109 05/01/2014 15:34:41
Data Release Number (DRN): 7450

Congratulations, FIRSTNAMEFN! Your FAFSA was successfully submitted to Federal Student Aid.

 Does your brother or sister need to complete a FAFSA? If so, you can [transfer your parents' information into a new FAFSA](#) for your brother or sister to save time. Your parents will have to provide a signature again, but that's all.

What Happens Next

- You will receive an e-mail version of this page.
- In 3-5 business days, you will receive an e-mail notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

pl(s) on your FAFSA:

School Name	Graduation Rate	Retention Rate	Transfer Rate	Additional Information from College Navigator
ALABAMA AGRCLTL & MECHL UNIV	32%	68%	NA	NA

Eligibility Information

Estimated Expected Family Contribution (EFC) = 000000

The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.

The EFC is not how much aid you will receive or how much you have to pay for college.

Based on the [eligibility criteria](#), you may be eligible for the following:

[Pell Grant](#) Estimate - \$5,730.00

[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.

In addition, you should learn about [federal tax benefits for education](#), including the *American Opportunity Tax Credit (AOTC)*.

You and your parent(s) indicated that you had filed an IRS tax return when you provided your financial information and it appears that you were eligible to use the [IRS Data Retrieval Tool](#), which allows you to view information from your IRS tax return and transfer that information directly into your FAFSA. The benefit of using the tool is that it's the easiest way to provide accurate tax information, and it also eliminates the need for providing a copy of your and your parents' tax return to the financial aid office

Even though student data was provided, still has an Auto Zero EFC

Example #3 - Independent SNT

- Dependent students who qualify for SNT do not have to report parent or student assets
- Independent students who qualify for SNT do not have to report student assets

Asset Threshold Question

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Additional Financial Information

- American Opportunity Tax Credit or Lifetime Learning Tax Credit
- Child support paid
- Taxable earnings from Work-study, Assistantships or Fellowships
- Grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

Untaxed Income

- Payments to tax-deferred pension and retirement savings plans
- IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- Child support received
- Tax exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pensions
- Housing, food, and other living allowances paid to military, clergy, and others
- Veterans noneducation benefits
- Other untaxed income not reported such as workers' compensation or disability
- Money received or paid on your behalf

As of today, does the total amount of your current [assets](#) exceed \$2,500.00?
 Yes No

- Question displays and is dynamic, to include appropriate APA based on marital status and age
- If an independent student answers no, it looks very similar to an Independent SNT (but not AZ) student
- If a dependent student, the asset threshold question is present for parent, but not present for student. The student is **required** to provide asset information

Scenario #1

- Billy, a Maryland resident, was born on October 31st, 1985. He is a very busy guy working full time and raising his daughter on his own. His 1040A income tax return last year reported his income at \$19,500. One of his friends suggests that he could take night classes at the local community college as a way to boost his work place skills and possibly get a pay increase
- Billy completes his online FAFSA to see what he might qualify for. What path would he be on?



Scenario #2

- Sally, from South Dakota, is an independent single student with no dependents. She was recently let go from her job and meets the criteria for a dislocated worker. She is working hard to recover, but with the economy, the only work she could find is filling in as a barista. Much to her dismay and her love of shoes, her 1040 shows she is now only making \$24,000. She decides that she might need to go back to school and wants to see if she qualifies for federal student aid.
- What path on *FAFSA on the Web* would she be on?



Scenario #3

- George, 30 and Judy, 29 are residents of Louisiana and are newlyweds. They have many reasons in their life to celebrate as Judy was just accepted to law school. However, they are a little worried about the finances because with Judy returning to school their 1040A shows that they make \$22,000 a year from George's income. Judy decides to complete her online FAFSA to see what they would qualify for
- What path would she be on?



Additional Resources

- [EFC Formula Guide](http://www.ifap.ed.gov/efcformulaguide/attachments/091913EFCFormulaGuide1415.pdf)
(<http://www.ifap.ed.gov/efcformulaguide/attachments/091913EFCFormulaGuide1415.pdf>)
- Justification of Data Elements
- Demo Site: fafsademotest.ed.gov
User name: eddemo
Password: fafsatest

Application Updates

Data - Application

January 1 st - March 31 st Applications Processed	2014-2015 App Cycle	2013-2014 App Cycle	Change in Apps
Independents	3,859,557	4,008,160	-3.71%
Dependents	4,967,028	4,846,178	2.49%
Total	8,826,585	8,854,338	-0.31%
Original	3,693,276	3,703,813	-0.28%
Renewal	5,133,309	5,150,525	-0.33%
Total	8,826,585	8,854,338	-0.31%

- The number of applications processed from January 1st- March 31st has decreased by .31% from the prior year.

Data – Web completion times

App Types	2013-2014	2014-2015
EZ FAFSA	0:25:47	0:25:24
EZ Renewal	0:14:43	0:14:54
FAFSA	0:33:03	0:32:29
Renewal	0:21:54	0:21:27
All Types	0:25:45	0:25:20

- As of March 30th, the average amount of time it takes to complete the 2014-15 *FAFSA on the Web* is 25 mins and 20 seconds.*

Data - Where are we at?

- ACSI (American Customer Satisfaction Index):
 - The FAFSA average customer satisfaction score has been in the mid to high 80s for the past 5 cycles
- Peak:
 - The highest number of applications were submitted on Friday, February 28th, when 273,191 applications were submitted using FAFSA on the Web
 - Our highest number of concurrent sessions occurred on Thursday, February 27th at 9:07p.m., when we had 33,998 active sessions

Data - New Marital Status

Dependents- Parents' Marital Status Code	Marital Status	January 1 st - March 28 th	Percentages
1	Married/Remarried	3,000,967	61.74%
2	Never Married	526,122	10.82%
3	Divorced/Separated	1,122,239	23.09%
4	Widowed	129,320	2.66%
5	Unmarried and Both Parents Living Together	27,615	.57%
Blank		54,334	1.12%
Total		4,860,597	100.00%

Data - MyStudentData Downloads

January 1 st - March 31 st	Visits to MyStudentData Web page	MyStudentData download counts
2013-14 application cycle	22,834	8,398
2014-15 application cycle	69,965	25,614



MyStudentData Download

The MyStudentData Download function allows you to download a portion of your FAFSA information in a simple, machine-readable file (CSV format) that you can share - at your own discretion - with third parties that develop helpful consumer tools.

The MyStudentData Download function is separate from the process of applying for financial aid and is completely optional. The schools you have listed on your FAFSA will receive your financial aid information directly and do not need a copy of your MyStudentData file.

WARNING: The MyStudentData Download file contains your personal information, including your name and any financial information reported on your FAFSA. Do not leave this file on a public computer or in an unsecured location.

For more information about the MyStudentData Download functionality, go to www.StudentAid.gov/resources/mystudentdata-download.

The table below lists information about your 2014-2015 FAFSA and any corrections you've made to your FAFSA. Your most recent transaction is displayed first.

You can choose the language in which the file may be downloaded. Verify that the third party with whom you are sharing the file can use the language selected.

#	Status	Submitted	Submitted By	Processed	
03	Processed Successfully	01/03/2014	Student	01/01/2014	MyStudentData Download (English) MyStudentData Download (Español)
02	Processed Successfully	01/02/2014	Student	01/01/2014	MyStudentData Download (English) MyStudentData Download (Español)
01	Processed Successfully	01/01/2014	Student	01/01/2014	MyStudentData Download (English) MyStudentData Download (Español)

Freely Associated States

Issue:

FSA would like to provide guidance to students who are from the Freely Associated States to use the same SSN assigned to them each year when they complete the FAFSA.

Solution:

FSA is working on multiple solutions for 2015-16 start up that will encourage students to use their assigned SSN.

Foster Care Youth

Issue:

Congress has issued a bill asking for the FAFSA to identify individuals who are in Foster Care.

Solution:

FSA will be modifying the FAFSA to message to Foster Care Youth about potential resources available to them.

New Marital Status

Issue:

While there has always been some level of confusion regarding who is considered a parent on the FAFSA, the new “Unmarried and both parents living together” marital status and the change to the definition of marriage have increased confusion.

Solution:

FSA is working to create an infographic to assist dependent applicants in the determination of whose information to report on the FAFSA.

IRS DRT Clarification

Issue:

There is a desire in the community to improve the clarity and completeness of the help and authentication pages related to the IRS DRT.

Proposed Solution:

Update the existing IRS help topics, create new IRS help topics, and review authentication guidance on IRS pages.

IRS DRT Promotion

Issue:

There is a desire to increase usage of the IRS DRT and provide guidance regarding how to access it.

Solution:

FSA is creating an infographic to promote the IRS DRT and provide general information about how to access it.

Important Dates



Important Dates

- August 2014
 - **2015-2016 Electronic Data Exchange (EDE) Technical Reference** draft (including the ISIR Record Layout and ISIR Cross-Reference)
- August 2014
 - **2015-2016 Application Processing System Specifications for Software Developers** draft
- End of October 2014
 - **2015-2016 EFC Formula Guide** on the IFAP website, pending final 2014 IRS tax legislation

Important Dates

- October 2014
 - *2015-2016 CPS Test System User Guide*
- October 2014
 - *2015-2016 Electronic Data Exchange (EDE) Technical Reference - Final*
- October 2014
 - *2015-2016 ISIR Guide* on IFAP

Important Dates

- November 2014
 - *2015-2016 SAR Comment Codes and Text*
- November 2014
 - *2015-2016 Summary of changes for Application Processing Guide (SCAPS)*
- December 2014
 - *The CPS Test System is made available*

Contact Information

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Any Questions?

Thank you for coming!