

2017-18 FAFSA® Updates, Including Early FAFSA and Use of Prior-Prior Year Income

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2017-18 FAFSA Updates



FAFSA Communication Strategy



FAFSA Enhancements & Important Dates

2017-18 FAFSA Updates



FAFSA History

FAFSA Evolution

- 1992 – *Free Application for Federal Student Aid* (FAFSA)
- 1997 – *FAFSA on the Web*
- 2008 – IRS Data Retrieval Tool (2009-10 FAFSA)
- 2009 – Skip/Smart Logic (2010-11 FAFSA)
- 2016 – Earlier Launch & Collection of Earlier Income and Tax Information (2017-18 FAFSA)

2017-18 FAFSA Changes

2017-18 FAFSA Changes

Change #1: Earlier FAFSA Launch

- 2017–18 FAFSA available Oct. 1, 2016, at fafsa.gov
- Change to October 1 launch will be permanent

Change #2: Earlier Income Info Required

- 2015 tax/income information required
- IRS Data Retrieval Tool available at time of launch

Benefits of FAFSA Changes

- **Benefit #1: Alignment**
 - Many college application deadlines occur in the fall
 - Alignment of FAFSA availability = less confusion
- **Benefit #2: Certainty**
 - No need to estimate tax information
 - IRS Data Retrieval Tool available at launch
 - Earlier receipt of Expected Family Contribution (helps with assessing net costs)
- **Benefit #3: Less Pressure**
 - More time before (most) state and school financial aid deadlines
 - More time to compare school offers before College Signing Day

2017–18 FAFSA Changes

CHANGES TO THE FAFSA® PROCESS FOR 2017–18

SUBMIT A FAFSA EARLIER: Students will be able to submit a 2017–18 FAFSA as early as Oct. 1, 2016, rather than beginning on Jan. 1, 2017. The earlier submission date will be a permanent change, enabling students to complete and submit their FAFSAs as early as October 1 every year. (There is NO CHANGE to the 2016–17 schedule. The 2016–17 FAFSA became available Jan. 1, 2016.)

USE EARLIER INCOME AND TAX INFORMATION: Beginning with the 2017–18 FAFSA, students will report income and tax information from an earlier tax year. For example, on the 2017–18 FAFSA, students (and parents, as appropriate) will report their 2015 income and tax information, rather than their 2016 income and tax information.

Here's a summary of key dates for submitting the FAFSA depending on when you plan to go to school:

IF YOU PLAN TO ATTEND COLLEGE FROM	YOU WILL SUBMIT THIS FAFSA	YOU CAN SUBMIT THE FAFSA FROM	USING INCOME AND TAX INFORMATION FROM
July 1, 2015–June 30, 2016	2015–16	January 1, 2015–June 30, 2016	2014
July 1, 2016–June 30, 2017	2016–17	January 1, 2016–June 30, 2017	2015
July 1, 2017–June 30, 2018	2017–18	October 1, 2016–June 30, 2018	2015
July 1, 2018–June 30, 2019	2018–19	October 1, 2017–June 30, 2019	2016

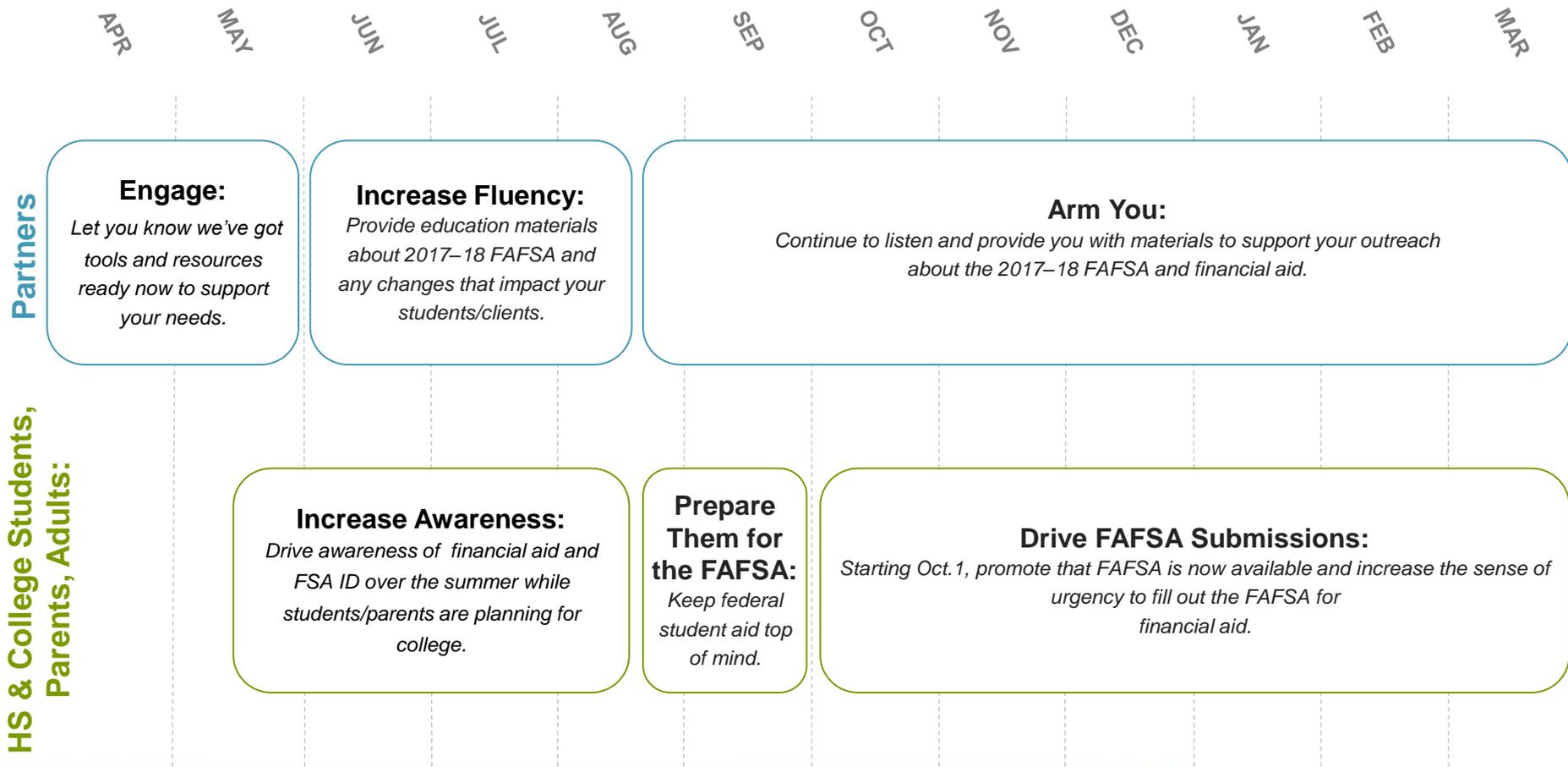
FAFSA Communication Strategy



Outreach Plan for 2017-18 FAFSA

High Level Outreach Plan

1 strategic campaign. 2 core audiences. 3 phases.



High Level Outreach Plan

- **Summer:** Prep for the fall! Tell rising seniors to get FSA IDs (full info: StudentAid.gov/fsaid) & research colleges
- **September:** Hold financial aid night
 - Remind students and parents about the FSA ID
 - Explain FAFSA is coming soon & importance of filling it out promptly

High Level Outreach Plan

- **October:** Hold FAFSA completion event
 - Provide hands-on help filling out FAFSA
 - Explain what happens next
- **November - April:** Help students interpret/compare aid offers
 - Emphasize importance of meeting deadlines set by colleges
 - Remind students to check e-mail

Resources for Counselors/Mentors

- Language on 2017-18 FAFSA that can be shared with students and parents via e-mails, newsletters, etc.
 - Focuses on
 - earlier availability of 2017-18 FAFSA
 - use of 2015 tax information
 - Contains information regarding securing an FSA ID over the summer

Outreach Resources

Materials and Resources for Outreach

- **FAFSA**: FinancialAidToolkit.ed.gov/fafsa
- **Resources**: FinancialAidToolkit.ed.gov/resources
- **FAFSA Changes**: FinancialAidToolkit.ed.gov/fafsa-changes
 - Talking points
 - Table of FAFSA launch dates and tax years
 - Fact sheets for counselors and parents & college students
 - Outreach calendar
 - PowerPoint presentations
 - Information about upcoming webinars

FinancialAidToolkit.ed.gov

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

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Financial Aid Toolkit

Learn About Financial Aid

Conduct Outreach

Get Training

Search Financial Aid Tools and Resources

Help students and parents prepare for college or career school.

The Financial Aid Toolkit provides federal student aid information and outreach tools for counselors, college access professionals, nonprofit mentors, and others.



LEARN ABOUT FINANCIAL AID

Understand the basics of federal student aid, the FAFSA, and loan repayment.



CONDUCT OUTREACH

Get tips on hosting events; sample financial aid night PowerPoint presentations; and suggested messages for social media, e-mails, or newsletters.



GET TRAINING

Find training or conference opportunities and learn about the National Training for Counselors and Mentors (NT4CM) program.



SEARCH TOOLS AND RESOURCES

Search our resource library by content, audience, topic, and time of year.

ANNOUNCEMENTS

FAFSA CHANGES FOR 2017-18

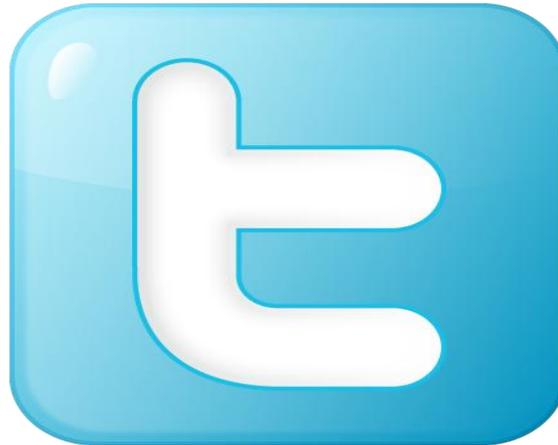
Connect With Us!



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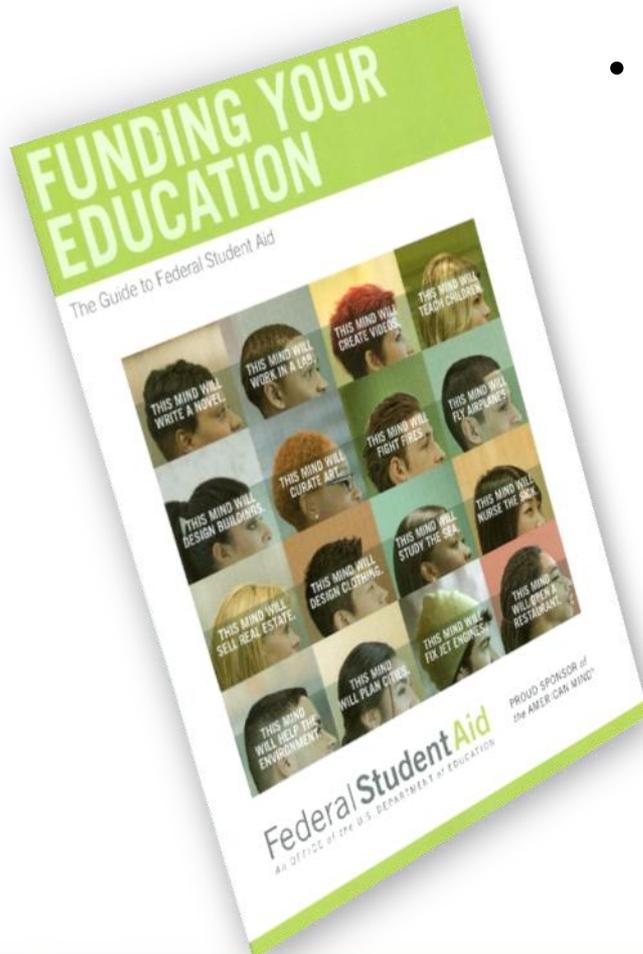
YOUTUBE

Federal Student Aid

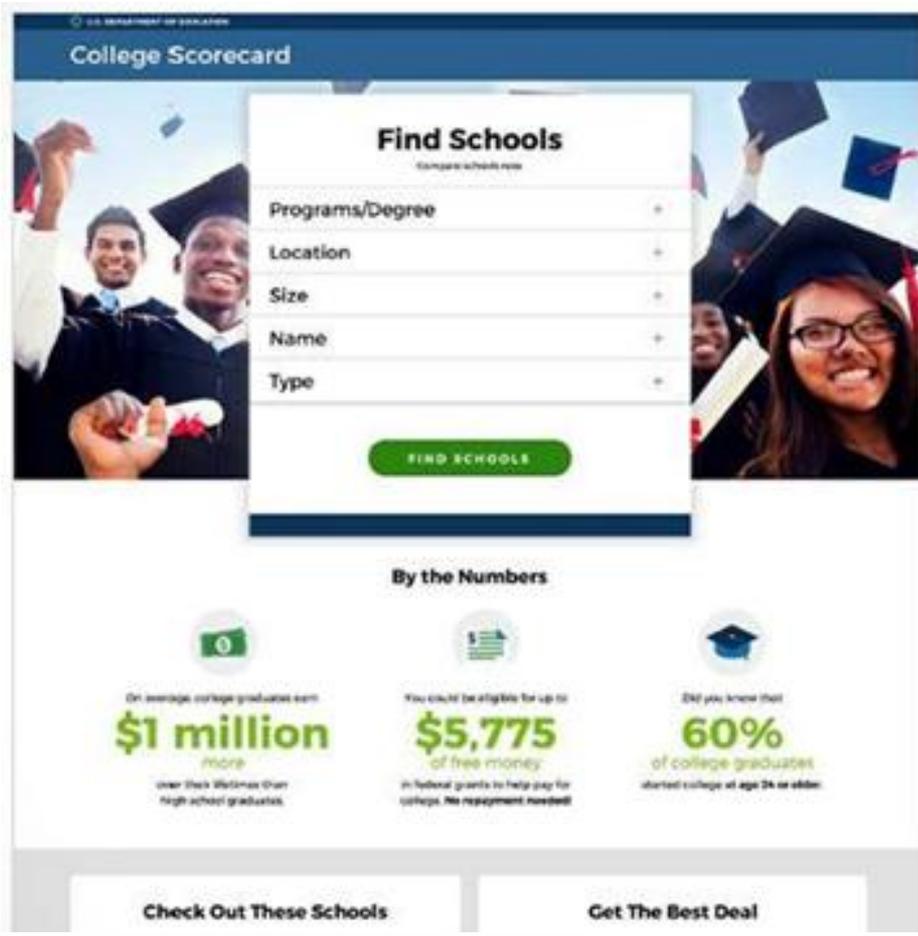
www.youtube.com/FederalStudentAid

Ordering Publications

- Order publications from FSA
Pubs: www.FSAPubs.gov



<https://collegescorecard.ed.gov/>



Federal Student Information Center (FSAIC)

FSAIC can answer questions via:

- E-mail
- Live Chat
- Toll Free Hotline

1-800-4FED-AID
(1-800-433-3243)

Monday through Friday
8:00 a.m. – 11:00 p.m. ET

Saturday and Sunday
11:00 a.m. – 5:00 p.m. ET

E-mail Us

You can email us anytime.

Chat with Us

Ask a live agent your questions via a web chat.

Call Us

1-800-4FED-AID
(1-800-433-3243)
International Caller? Can't make a toll-free call?
1-334-523-2691

Hours of Operation

Monday–Friday
8 a.m.–11 p.m. Eastern time (ET)

Saturday–Sunday
11 a.m.–5 p.m. Eastern time (ET)

We are closed on federal holidays, the day after Thanksgiving and on December 24th.

We are open on New Year's Day, Martin Luther King Jr.'s Birthday, and Washington's Birthday from 11 a.m.–5 p.m. ET.

Hearing Impaired?
TTY calls only.
1-800-730-8913

2016 FSA Webinar Series



Webinar Title	Target Audience	Date and Time
2017–18 FAFSA Update	Counselors, mentors, and the college access community	May 3, 2016 4:00–5:00 p.m. EST
Financial Aid Toolkit: A Walkthrough of the Toolkit and Available Resources	Counselors, mentors, and the college access community	May 24, 2016 4:00–5:00 p.m. EST
FSA ID Demo	Parents, students, counselors, mentors, and the college access community	June 9, 2016 4:00–5:00 p.m. EST
Tools, Resources, and Helpful Hints for Undocumented Students	Parents and students	June 15, 2016 4:00–5:00 p.m. EST
2017–18 FAFSA Update	Counselors, mentors, and the college access community	June 28, 2016 5:00–6:00 p.m. EST
FSA Tools and Resources	Counselors, mentors, and the college access community	July 7, 2016 2:00–3:00 p.m. EST
FSA ID Demo	Parents, students, counselors, mentors, and the college access community	July 12, 2016 4:00–5:00 p.m. EST
Tips for Using FSA’s Digital Engagement Resources	Counselors, mentors, and the college access community	July 21, 2016 3:00–4:00 p.m. EST

FAFSA Enhancements & Important Dates



Enhanced Messaging

- Issue: Students are confused about which FAFSA to complete when two cycles are active and the student has not completed a FAFSA for either year
- Solution: Messaging on the “Get Started” page has been enhanced for clarity



Welcome, mark Logout

SEARCH

STUDENT

Get Started

Welcome, mark potter!

Fill out your FAFSA (Free Application for Federal Student Aid)!
To receive federal student financial aid, you need to fill out a FAFSA every school year. Let's get started.

For which school year are you applying for financial aid?

2017-2018 school year

START 2017-2018
FAFSA

2016-2017 school year

START 2016-2017
FAFSA

If you are applying for a summer session, or just don't know which application to complete, check with the college you are planning to attend.

FSA ID

Last Time, Date FSA ID Used:

FSA ID Status:

[Create an FSA ID](#)

There is no FSA ID on file for the information you entered.

NEED HELP?

Enhanced Messaging

- Issue: Students and parents might not be sure which tax year data to report on the financial information pages
- Solution: Applicants and parents are instructed to provide financial information from their 2015 tax return



Help

SEARCH

Student Demographics

School Selection

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Sign & Submit

Confirmation

Student Tax Information

i ▪ **Attention!** You must provide financial information from your **2015 tax return** on the following pages.

✓ ▪ Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?

Select ▼

PREVIOUS

NEXT

NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

EXIT

Help and Hints

Student Filed 2015 Income Tax Return? Question 32

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you "Will file" a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your income. If your income is not similar, click **Income Estimator** for assistance estimating your adjusted gross income, and answer the remaining questions about your income to the

STUDENT



SEARCH

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

Student Financial Information continued

Enter the amount of your income tax for 2015. This amount is found on IRS Form 1040-lines (56 minus 46).

\$.00

Enter your exemptions for 2015. This amount is found on IRS Form 1040-line 6d.

Did you have any of the following items in 2015? Check all that apply and provide amounts.

2015 Additional Financial Information

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

2015 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 benefits
- Money received or paid on your behalf

Do you want to skip questions about your assets?

Yes No

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

**Student's 2015 U.S. Income Tax Paid
Question 37**

If you use the IRS Data Retrieval Tool and transfer your information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, enter your total tax amount for 2015.

This information may be on the following forms:

IRS Form 1040 – Subtract line 46 from line 56 and enter the total

IRS Form 1040A – Subtract

Enhanced Messaging

- Issue: There will be a larger population of applicants and parents for whom the income tax return won't provide the correct information due to a recent marital status change

Solution: Messaging and help text have been added



SEARCH

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Student Tax Information



- **Attention!** You must provide financial information from your 2015 tax return on the following pages.
- You indicated that you recently married or remarried. [To correctly answer the student financial questions](#), you must report information about you and your current spouse, even if you filed separate tax returns for 2015.



- Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?

Select

PREVIOUS

NEXT

NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

EXIT

Help and Hints

Student Filed 2015 Income Tax Return? Question 32

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you "Will file" a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your income. If your income is not similar, click **Income Estimator** for assistance estimating your adjusted gross income, and answer



[To correctly answer the student financial questions](#) links to the following help topic:

How to answer the student financial questions when student marital status changed after 2015

The FAFSA asks for marital status as of the day you fill it out, but it asks for income and tax return information from 2015. Therefore, your marital status may be different than it was when you filed your tax return.

Related Topics:

What if my marital status as of today is different than the marital status reported on my 2015 tax return?

What if my current spouse is different from the spouse listed on my 2015 tax return?

What if I am recently widowed?

What if my marital status as of today is different than the marital status reported on my 2015 tax return?

The FAFSA asks for marital status as of the day you fill it out, but it asks for income and tax return information from 2015. Therefore, your marital status may be different than it was when you filed your tax return.

- **If you filed a joint tax return for 2015 but you are no longer married when you fill out the FAFSA**, you will need to subtract your former spouse's tax return information to correctly answer the FAFSA questions only about yourself.
- **If you did not file a joint tax return for 2015 but you are married when you fill out the FAFSA**, you will need to add your current spouse's 2015 tax return information to correctly answer the FAFSA questions about yourself and your current spouse.

What if my current spouse is different from the spouse listed on my 2015 tax return?

The FAFSA asks for marital status as of the day you fill it out, but it asks for income and tax return information from 2015. Therefore, your marital status may be different than it was when you filed your tax return.

If you filed a joint tax return for 2015 but you are married to a different person when you fill out the FAFSA, you will need to subtract your former spouse's tax return information, and then add your current spouse's 2015 tax return information to correctly answer the FAFSA questions about yourself and your current spouse.

What if I am recently widowed?

The FAFSA asks for marital status as of the day you fill it out, but it asks for income and tax return information from 2015. Therefore, your marital status may be different than it was when you filed your tax return.

If you recently became widowed, you'll need to subtract the tax return information for your spouse to correctly answer the FAFSA questions only about yourself.

Enhanced Messaging

- Issue: Most applicants should have filed their 2015 taxes already
- Solution: Messaging reflects expectation that taxes have already been filed

Student Tax Information

 **The following error(s) have occurred:**

- You indicated that you will file taxes. If you have missed the 2015 tax filing deadline of April 2016 but still plan to file a 2015 income tax return with the Internal Revenue Service (IRS), click "OK." Otherwise, change your answer.

For 2015, have you completed your IRS income tax return or another tax return?

 Will file  [OK](#)

For 2015, what will be your tax filing status according to your tax return?

Married-Filed Joint Return 

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NEED HELP?

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IRS DRT Enhancements

- Issue: Filtering questions don't align with the collection of prior-prior year tax information
- Solution: Filtering questions have been modified



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Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?

Already completed

For 2015, what is your tax filing status according to your tax return?

Married-Filed Joint Return



To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, **answer the following question(s)**:

Did you file a [Form 1040X amended tax return](#) for 2015?

Yes No

Did you file a Puerto Rican or foreign tax return for 2015?

Yes No

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS DRT!

[LINK TO IRS](#)

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NEED HELP?

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CLEAR ALL DATA

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Help and Hints

Did you file a Puerto Rican or foreign tax return?

If you filed a Puerto Rican or foreign tax return, select **Yes**; otherwise, select **No**.

You are not eligible to use the [IRS Data Retrieval Tool](#) if you filed a Puerto Rican or foreign tax return.

Related Topics:

[Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?](#)

STUDENT



IRS DRT Enhancements

- Issue: Applicants who are eligible to use the IRS DRT are not using it
- Solution: Eligible applicants can only advance through FOTW if they use the IRS DRT or actively opt out of using the IRS DRT



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Student Tax Information

Application was successfully saved.

For 2015, have you completed your IRS income tax return or another tax return?

Already completed

For 2015, what is your tax filing status according to your tax return?

Married-Filed Joint Return

To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, answer the following question(s):

Did you file a [Form 1040X amended tax return](#) for 2015?

Yes No

Did you file a Puerto Rican or foreign tax return for 2015?

Yes No

Applying is faster and easier if you transfer your tax return information into this FAFSA with the IRS DRT!

[LINK TO IRS](#)

PREVIOUS

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NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

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Help and Hints

Did you file a Puerto Rican or foreign tax return?

If you filed a Puerto Rican or foreign tax return, select **Yes**; otherwise, select **No**.

You are not eligible to use the [IRS Data Retrieval Tool](#) if you filed a Puerto Rican or foreign tax return.

Related Topics:

[Why can't I use the IRS Data Retrieval Tool if I filed a tax return outside the U.S.?](#)





Home



Help

Welcome, [Logout](#)

[SEARCH](#)

STUDENT

Applying is faster and easier with the IRS DRT!

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. The [IRS Data Retrieval Tool](#) allows users to link to the IRS Web site and securely transfer original IRS tax return information into their FAFSA.

If you use the IRS DRT, you will not have to provide additional IRS documentation later to qualify for federal student aid.

[LINK TO IRS](#)

[No, Thanks](#)





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Leaving *FAFSA on the Web*

You have entered answers to one or more income questions. *FAFSA on the Web* will delete these responses and replace them with information contained in your tax return when you transfer your IRS tax information into this FAFSA.

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address

[Create an FSA ID](#)

FSA ID Password

Click **Proceed to IRS Site** to continue. Otherwise, click **Skip IRS Transfer**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

SKIP IRS TRANSFER

PROCEED TO IRS SITE



Other Enhancements

- Potential conflicting information due to the collection of income and tax information from the same year for both 2016-17 and 2017-18
- Medicaid added to the list of means-tested benefits
- Enhanced guidance for foster youth
- Elimination of FAFSA booklet



Help

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STUDENT

Student Financial Information

What income tax return did you file for 2015?

IRS 1040

What was your adjusted gross income for 2015? This amount is found on IRS Form 1040-line 37.

\$ 12,321.00

[INCOME ESTIMATOR](#)

How much did you earn from working (wages, salaries, tips, etc.) in 2015? This amount is the total of IRS Form 1040-lines 7+12+18.

\$ 1,212.00

As of today, are you a dislocated worker?

No

In 2015 or 2016, did you or anyone in your household, receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above**. If, at the time you are completing the FAFSA, you or anyone in your household, did NOT receive any of these benefits during 2015 or 2016, but do receive any of them on or before December 31, 2016, you must return to the FAFSA and update your response.

Answering these questions will not reduce eligibility for student aid or these programs.

- Medicaid
- 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 income and assets?

Yes No

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[NEED HELP?](#)

[SAVE](#)

[CLEAR ALL DATA](#)

[VIEW FAFSA SUMMARY](#)

[EXIT](#)

Help and Hints

Is Student or Spouse a Dislocated Worker Question 102

In general, a person may be considered a dislocated worker if he or she:

- is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- has been laid off or received a lay-off notice from a job;
- was self-employed but is now unemployed due to economic conditions or natural disaster;
- is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of

Important Dates

August 2016

- 2017-18 Electronic Data Exchange (EDE) Technical Reference (FINAL)
- 2017-18 EFC Formula Guide
- 2017-18 SAR Comment Codes and Text Guide
- 2017-18 ISIR Guide

Important Dates

September 2016

- 2017-18 Summary of Changes for the Application Processing System
- 2017-18 FAFSA on the Web Preview Presentation
- 2017-18 CPS Web Applications Demo System availability (September 25, 2016)

Important Dates

October 2016

- 2017-18 FAFSA on the Web availability (October 1, 2016)
- 2017-18 IRS Data Retrieval Tool availability (October 1, 2016)
- 2017-18 FAA Access to CPS Online availability (October 1, 2016)
- 2017-18 EDExpress for Windows 2017-18, Release 1.0 (October 3, 2016)

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