Agenda

1. Application processing statistics
2. Changes required by external sources
3. Enhancements as a result of feedback
4. Continuous improvement
Application processing statistics

Changes required by external sources

Enhancements as a result of feedback

Continuous improvement
Super Fun (FAFSA-ish) Facts

• Koalas have fingerprints. In fact, koala prints are very similar to human fingerprints, even to expert crime scene investigators.

• Clocking in at 100 mph, we can sneeze faster than cheetahs run, four-and-a-half times faster than Usain Bolt’s record, and 20 times faster than Michael Phelps.

• Tornadoes can develop over water creating “waterspouts,” and they suck up large amounts of lake or sea water—as well as whatever’s swimming in that water. As far as we know, there’s no tornado powerful enough to pick up sharks, but a fish-nado is entirely possible.
Submitted Applications Through Oct. 31

Submitted Applications

- 2018-19: 16,902,622
- 2019-20: 16,393,853

16,800,000
16,500,000
16,200,000
15,900,000
15,600,000
15,300,000
15,000,000
14,700,000
14,400,000
14,100,000
13,800,000

Proud Sponsor of the American Mind
Submitted Applications Month of October

<table>
<thead>
<tr>
<th>Month</th>
<th>2019-20</th>
<th>2020-21</th>
</tr>
</thead>
<tbody>
<tr>
<td>October</td>
<td>1,880,000</td>
<td>2,478,641</td>
</tr>
<tr>
<td></td>
<td>2,040,000</td>
<td>2,165,029</td>
</tr>
</tbody>
</table>
Submitted Applications From High School Seniors

- Submitted Apps month of Oct.
- Completed Apps month of Oct.

<table>
<thead>
<tr>
<th>Year</th>
<th>Submitted Apps</th>
<th>Completed Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td>680,000</td>
<td>700,000</td>
</tr>
<tr>
<td>2020-21</td>
<td>720,000</td>
<td>740,000</td>
</tr>
</tbody>
</table>

Bar chart showing the number of submitted and completed applications from high school seniors in October 2019-20 and 2020-21, with an increase in both categories over the years.
<table>
<thead>
<tr>
<th>Income</th>
<th>2019-20</th>
<th>Percentage</th>
<th>2020-21</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $10,000</td>
<td>349,693</td>
<td>16.15%</td>
<td>393,982</td>
<td>15.90%</td>
</tr>
<tr>
<td>$10,000 - $19,999</td>
<td>239,547</td>
<td>11.06%</td>
<td>267,949</td>
<td>10.81%</td>
</tr>
<tr>
<td>$20,000 - $29,999</td>
<td>234,396</td>
<td>10.83%</td>
<td>264,669</td>
<td>10.68%</td>
</tr>
<tr>
<td>$30,000 - $39,999</td>
<td>196,452</td>
<td>9.07%</td>
<td>225,920</td>
<td>9.11%</td>
</tr>
<tr>
<td>$40,000 - $49,999</td>
<td>151,635</td>
<td>7.00%</td>
<td>172,893</td>
<td>6.98%</td>
</tr>
<tr>
<td>$50,000 - $59,999</td>
<td>121,985</td>
<td>5.63%</td>
<td>137,859</td>
<td>5.56%</td>
</tr>
<tr>
<td>$60,000 - $69,999</td>
<td>103,979</td>
<td>4.80%</td>
<td>116,686</td>
<td>4.71%</td>
</tr>
<tr>
<td>$70,000 - $79,999</td>
<td>91,693</td>
<td>4.24%</td>
<td>102,347</td>
<td>4.13%</td>
</tr>
<tr>
<td>$80,000 - $89,999</td>
<td>83,227</td>
<td>3.84%</td>
<td>91,931</td>
<td>3.71%</td>
</tr>
<tr>
<td>$90,000 - $99,999</td>
<td>74,130</td>
<td>3.42%</td>
<td>83,366</td>
<td>3.36%</td>
</tr>
<tr>
<td>=&gt; $100,000</td>
<td>518,292</td>
<td>23.94%</td>
<td>621,039</td>
<td>25.06%</td>
</tr>
<tr>
<td>Sum:</td>
<td>2,165,029</td>
<td>100.00%</td>
<td>2,478,641</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
Number of Schools Listed on FAFSA® Form

Number of schools listed on the FAFSA form (Freshmen)

- 1: 47.76%
- 2-4: 24.97%
- 5+: 27.27%

Number of schools listed on the FAFSA form (All Filers)

- 1: 21.27%
- 2-4: 17.83%
- 5+: 60.89%
IRS DRT Use Oct.1 – Oct. 31

- Used DRT: 57.85% (2019-20), 61.76% (2020-21)
- Did Not Use DRT: 42.15% (2019-20), 38.24% (2020-21)
Number of SNT Applicants Month of October

<table>
<thead>
<tr>
<th>Year</th>
<th>SNT EFC</th>
<th>Not SNT EFC</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td>500,000</td>
<td>1,000,000</td>
<td>1,500,000</td>
</tr>
<tr>
<td>2020-21</td>
<td>1,000,000</td>
<td>1,500,000</td>
<td>2,000,000</td>
</tr>
</tbody>
</table>

Legend:
- SNT EFC
- Not SNT EFC
- Total
Total myStudentAid Downloads

2020-21 MyStudentAid App and FAFSA Weekly Report for Oct 1-Nov 10, 2019

Total FY20 App Downloads: 211,996
Total Downloads to Date: 1,438,151

iOS Downloads: 134,388
Android Downloads: 77,608

FY20 Operating System Downloads:
- iOS: 36.6%
- Android: 63.4%

Note: App downloads are based on device installs for the MyStudentAid app with 2020-21 FAFSA. It does not include updates or redownloads.

Source: iTunes App Store and Google Play Store
Application processing statistics

Changes required by external sources

Enhancements as a result of feedback

Continuous improvement
Just found out I got awarded the California Student Aid Grant and my FAFSA just processed can I get a hell yeah?

@FAFSA has 2020-2021 FAFSA application opened yet.

4:49 PM - 30 Sep 2019

Matt @MattFalduto · 28 Nov 2018
Ok. Misty Parkinson wins the opening session.

Jeff Shelby @jeffshelby1

Replies to @MattFalduto

Misty for President 2020!

7:42 AM - 28 Nov 2018
FAFSA Superheroes Read Mobile Comments

Me and my mother used to get so angry at the old way of filling this out. This app made it such a breeze to do it. Oh man I was so regretting having to do this before, but now I am so relieved. This app made it easy I can’t begin to tell you how this changed my existence for today. I am so less stress than when I started.

This app is beautiful. It’s smooth, easy to use and easy to read. I had no problems whatsoever. I applied for my student aid laying in bed! I am blown away. I fully expected it to be clunky and hard to navigate like many government apps/sites are, but this was so so so above and beyond. Please give the people who worked on this a raise! They did a stellar job!

It was all self explanatory..very easy..a click here and there and bam! Before I knew it, I was done.
Children of Fallen Heroes Indicator

<table>
<thead>
<tr>
<th>Step Three: Student Status</th>
<th>Selected GSR Value (Transaction ID)</th>
<th>Enter Correct Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>45. Student Born Before January 1, 1997?</td>
<td>Yes</td>
<td>$1000.00</td>
</tr>
<tr>
<td>46. Is Student Married?</td>
<td>No</td>
<td>$5000.00</td>
</tr>
<tr>
<td>47. Is Student a Veteran?</td>
<td>No</td>
<td>$0.00</td>
</tr>
<tr>
<td>48. Does Student Have Children In the Home?</td>
<td>No</td>
<td>$0.00</td>
</tr>
<tr>
<td>49. Is Student Eligible for Children's Disability Support?</td>
<td>Yes</td>
<td>$0.00</td>
</tr>
<tr>
<td>50. Is Student Eligible for Children's Special Education?</td>
<td>No</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Children of Fallen Heroes Indicator: Yes

Dependency Override: 1 - Eligible for CFH, 2 - Not Eligible for CFH
More Information on Children of Fallen Heroes

• For more information, attend session #5, Common Origination and Disbursement (COD) System Update

  • Wednesday, 12/04: 1:50 – 3:05 p.m., Hall 5
  • Thursday, 12/05: 10:05 – 11:20 a.m., Hall 5
DHS-SAVE 3rd Step Verification Update

DHS-SAVE 3rd Step Verification Update

• Version 3.0
  • Combines and updates all SAVE system process changes from last 2 electronic announcements
    • SAVE instructions 2.0 and
    • Resend record to matches functionality
  • How to resolve the “No Cases Found” error message
  • Changes to the “Additional Request” buttons (VAWA, Cuban/Haitian Entrant, and Fraud)
  • PDPA (Supervisor Third Step Only, STSO) User IDs are now enabled to view records and submit third step verification requests
  • DHS verification numbers will start with “00” followed by the last 2 digits of a year
  • How to advise students who need to correct, renew or replace their immigration documents
Email questions to applicationprocessingdivision@ed.gov, or Call APD voicemail at 202-377-4600 and leave message with:
  • Student’s DHS verification number
  • Your name
  • Your question
  • Your phone number
**Note: Do not call the SAVE Call Center because they do not have a full understanding of our unique SAVE system access**
Tax Changes – 1040NR & 1040NR-EZ

2019-20

What type of 2017 income tax return did your parents file?

- IRS 1040
- IRS 1040A or 1040EZ
- Foreign tax return
- A tax return with Puerto Rico, a U.S. territory or Freely Associated State

NEXT

2020-21

What type of 2018 income tax return did your parents file?

- IRS 1040
- Foreign tax return. IRS 1040NR or IRS 1040NR-EZ
- A tax return with Puerto Rico, a U.S. territory or Freely Associated State

NEXT
Tax Changes - Combining Untaxed Portions of IRA Distributions & Pensions

2019-20

Did you have any of the following items in 2017? Enter amounts for all that apply.

1. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter unearned combat pay reported on the 1099-MISC or the 1099-NEC.
   - [ ] $0.00

2. Student college grant and scholarship aid reported to the IRS in your income. Includes AmeriCorps benefits awarded, living allowances, and interest accrual payments as well as grant and scholarship portions of fellowships and internships.
   - [ ] $0.00

3. Education credits: American Opportunity Tax Credit or Lifetime Learning Tax Credit from IRS Form 1040 Line 29.
   - [ ] $0.00

4. IRA deductions and payments to self-employed SEP SIMPLE. (Keogh, and other qualified plans from IRS Form 5405-SIMPLE). (25-30)
   - [ ] $0.00

5. Tax exempt interest income from IRS Form 1040 Line 1a.
   - [ ] $0.00

6. Untaxed portion of IRA distributions from IRS Form 1040 Line 1a minus 15th. Exclude withdrawals of negative, enter a zero here.
   - [ ] $0.00

7. Untaxed portion of pensions from IRS Form 1040 Line 1b minus 16th. Exclude withdrawals of negative, enter a zero here.
   - [ ] $0.00

2020-21

Did you have any of the following items in 2018? Enter amounts for all that apply.

1. Combat pay or special combat pay. This should be zero for enlisted persons and warrant officers because their combat pay is entirely nontaxable. Only enter taxable combat pay included in your (and, if married, your spouse's) adjusted gross income.
   - [ ] $1.00

2. Student college grant and scholarship aid reported to the IRS in your income. Includes AmeriCorps benefits awarded, living allowances, and interest accrual payments as well as grant and scholarship portions of fellowships and internships.
   - [ ] $0.00

3. Education credits: American Opportunity Tax Credit or Lifetime Learning Tax Credit from IRS Form 1040 Schedule 1 Lines 25-30.
   - [ ] $0.00

4. IRA deductions and payments to self-employed SEP SIMPLE. (Keogh, and other qualified plans from IRS Form 5405-SIMPLE). (25-30)
   - [ ] $0.00

5. Tax exempt interest income from IRS Form 1040 Line 2a.
   - [ ] $0.00

6. Untaxed portion of IRA distributions and pensions from IRS Form 1040 Line 1a minus 15th. Exclude withdrawals of negative, enter a zero here.
   - [ ] $0.00

7. Untaxed portion of pensions from IRS Form 1040 Line 1b minus 16th. Exclude withdrawals of negative, enter a zero here.
   - [ ] $0.00

8. Untaxed portion of pensions from IRS Form 1040 Line 1c minus 17th. Exclude withdrawals of negative, enter a zero here.
   - [ ] $0.00
Elimination of 1040-A & EZ

• The elimination of IRS Forms 1040-A and 1040-EZ required FSA to develop a reasonable proximation for automatic zero (AZ) and simplified needs test (SNT) EFC calculations.
Application processing statistics
Changes required by external sources
Enhancements as a result of feedback
Continuous improvement
Superheroes Read Tool Tip Feedback

- Q: Do you have driver’s license information that you want to provide?
  - A: “I’ve misplaced my license in the past couple days and haven’t had time to replace it.”
- Q: What is your marital status?
  - A: “Because I haven’t found the right man yet.”
- Q: Student’s high school name, city and state?
  - A: “I was homeschooled, so for some reason, my school is not listed.”
- Q: How many people in your parents’ household will be college students in 20-21?
  - A: “The answer is zero but it won’t let us put a zero.”
I assume that these questions will be used in part to determine eligibility for the simplified EFC formulas; however, this could eliminate populations of students who would have otherwise qualified with the 1040A. Applicants who file a Schedule 1 may be doing so for the following reasons, which were previously reported on the 1040A. Thank you for your consideration on this important matter.

Some impacted populations include:
- families that received unemployment compensation
- teachers who purchase school supplies from their own funds for their classrooms
- borrows who claim the student loan interest deduction
- people who make contributions to personal deductible IRAs
- Alaskan residents who received the Alaska Permanent Fund dividend
FAFSA Questions 35 & 82

2020-21 60-day FAFSA draft

35. Did (or will) you file a Schedule 1 with your 2018 tax return? See Notes page 9.

2020-21 30-day FAFSA draft

35. Did (or will) you file Schedule 1 with your 2018 tax return? Answer "No" if you did not file Schedule 1 or only filed it to report an Alaska Permanent Fund dividend. See Notes page 9 for other exceptions.

2020-21 final FAFSA question language

35. Did (or will) you file a Schedule 1 with your 2018 tax return? Answer "No" if you did not file a Schedule 1 or only filed a Schedule 1 to report an Alaska Permanent Fund dividend or one of the other exceptions listed in the Notes on page 9.
Synching of fafsa.gov with myFAFSA
Masking of SSN on Login View on fafsa.gov
Help Text Changes

Examples of help text updates based on user feedback:

- Did (or will) you file a Schedule 1 with your 2018 tax return?
- Are you a preparer?
- Create a Save Key
Examples of help text updates based on user feedback:

Did (or will) you file a Schedule 1 with your 2018 tax return?

This is question 35 on the paper Free Application for Federal Student Aid (FAFSA®) form.

*Generally, taxpayers file a Schedule 1 to report income or adjustments to income that can't be entered directly on Form 1040.*

This question is used to help determine if you may be eligible to skip certain questions in the FAFSA form.

Select “No” if you (and if married, your spouse) didn’t or won’t file a Schedule 1.

OR

Select “No” if you (and if married, your spouse) filed or will file a Schedule 1 but only to report one or more of the following six additions or adjustments to income on Schedule 1:

1. Capital gain (Line 13 may not be less than 0)
2. Unemployment compensation (Line 19)
3. Other income to report an Alaska Permanent Fund dividend (Line 21 may not be less than 0)
4. Educator expense (Line 23)
5. IRA deduction (Line 32)
6. Student loan interest deduction (Line 33)
Help Text Changes

Examples of help text updates based on user feedback:

Refer to the image below that shows you where to find the six exceptions on the Schedule 1.

Select “Yes” if you (or if married, your spouse) filed or will file a Schedule 1 to report additional income or adjustments other than one or more of the six exceptions listed above.

If you don’t know if you filed or will file a Schedule 1, select “Don’t know.”
Help Text Changes

Examples of help text updates based on user feedback:

- Did (or will) you file a Schedule 1 with your 2018 tax return?
- Are you a preparer?
- Create a Save Key
Did (or will) you file a Schedule 1 with your 2018 tax return?

Create a Save Key

Examples of help text updates based on user feedback:

**Are you a preparer?**

A preparer is anyone who charges a fee for helping you fill out your Free Application for Federal Student Aid (FAFSA®) form.

*If you’re a student filling out your own FAFSA form OR a relative or friend helping a student complete his or her form for free, then you’re NOT a preparer.*

Typically, high school counselors, school financial aid administrators, or other mentors don’t charge a fee to help you complete your application, so they’re not considered preparers unless you paid them for their services.

*If you’re charging a fee to help someone complete their FAFSA form, then you’re a preparer. Select “Yes.”*
Help Text Changes

Examples of help text updates based on user feedback:

Did (or will) you file a Schedule 1 with your 2018 tax return?

Are you a preparer?

Create a Save Key
Examples of help text updates based on user feedback:

Create a Save Key

- The save key is not the same as your FSA ID (which acts as a legal signature that you shouldn’t share). A save key allows you to return to an application or correction later from the point you left off if you need to stop and save your work. It also allows you to share access to your Free Application for Federal Student Aid (FAFSA®) application or correction if your parent needs to add information or sign it.

- The save key must be between 4 and 8 characters long. You can use any combination of numbers and/or uppercase and lowercase letters. For example, the save key “Student2” is different than the save key “SuDeNi2.”

- Try to choose a save key that you can remember but that would be hard for others to guess. Avoid using personal identifiers (for example, first name, last name, or date of birth) and simple save keys such as “1234” or “aaaa.”

- If you’re trying to log back in to your FAFSA form and have forgotten your save key, select the “I Forgot My Save Key” link and provide the requested information to access your FAFSA form.
Help Text Changes

Examples of help text updates based on user feedback:

- Did (or will) you file a Schedule 1 with your 2018 tax return?
- Are you a preparer?
- Create a Save Key
Tracking Mobile App Submissions

**Processing Information**
- **Transaction Number:** 01
- **Transaction Source:** Web Student
- **Date Application Completed:** 10/01/2019
- **Application Receipt Date:** 10/01/2019
- **Processed Date:** 10/01/2019
- **Signed By:** APPLICANT ONLY
- **EFC:** 9480

**Processing Information**
- **Transaction Number:** 01
- **Transaction Source:** mySA Mobile App
- **Date Application Completed:** 10/01/2019
- **Application Receipt Date:** 10/01/2019
- **Processed Date:** 10/01/2019
- **Signed By:** APPLICANT ONLY
- **EFC:** 9480
## Tracking Mobile App Submissions

### STEP SIX (Q103)
- School #1 001002 Housing #1 ON CAMPUS
- School #2 Housing #2
- School #3 Housing #3
- School #4 Housing #4
- School #5 Housing #5
- School #6 Housing #6

### STEP SEVEN (Q104 - Q106)
- Date Completed: 2/5/2020
- Signed By: APPLICANT AND PARENT
- Preparer’s Social Security Number
- Employer Identification Number (EIN)
- Preparer’s Signature

### OFFICE INFORMATION
- Primary EFC Type: 5
- Secondary EFC Type: 
- Transaction Processed Date: 3/31/2020

### Transaction Data Source/Type:
- MYSTUDENTAID MOBILE APP APPLICATION

### Source of Detriment
- School

### Federal School Code Indicator
- 001002

### Reject Override Codes:
- A: B: C: G: J: K: N: W:
- 3: 12: 20: 21:

### Assumption Override Codes:
- 1: 2: 3: 4: 5: 6:
Student Aid Report (SAR) in myFAFSA

Current Application Status:
Processed Successfully

These are the processing results of your 2020-2021 FAFSA® form. If you need to change any of the information displayed, go to fafsa.gov

Click here for information about privacy and eligibility.

Processing Results

Your estimated Expected Family Contribution (EFC) is 35603.

Learn about tax benefits and other types of aid that may be available to you.

Application Receipt Date: 10/22/2019
Processed Date: 01/01/2020
DRN: 3304
WWW.20202021SAR.COM

PRINT

Federal Student Aid
An Office of the U.S. Department of Education
<table>
<thead>
<tr>
<th>SAR Comment Code</th>
<th>Web Text</th>
<th>Mobile Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>006</td>
<td>If you need to make corrections to your information, you may either make them online at <a href="https://fafsa.gov">https://fafsa.gov</a> using your FSA ID, or by using this SAR. If you need additional help with your SAR, contact your school’s financial aid office or visit <a href="https://fafsa.gov">https://fafsa.gov</a> and click the “Help” icon on the FAFSA home page. If your mailing address or e-mail address changes, you can make the correction online or send in the correction on your SAR.</td>
<td>If you need to make corrections to your information, make them <a href="https://fafsa.gov">online</a> using your FSA ID. If you need additional help, contact your school's financial aid office or visit our <a href="https://fafsa.gov">help page</a>.</td>
</tr>
<tr>
<td>030</td>
<td>The Selective Service reported that you have not registered with them. If you are female or were born before 1960, registration is not required. Otherwise, if you are not yet registered, are male, and are 18 through 25 years of age, to receive aid you must do one of the following: (1) answer “Male” to Item 21 and “Register Me” to Item 22 on this SAR, (2) complete a Selective Service registration form at your local post office, or (3) register online at <a href="https://sss.gov">https://sss.gov</a>. If you believe you have already registered or are exempt, please check the Selective Service Web site at <a href="https://sss.gov">https://sss.gov</a>, select “registration info” and then “Who Must Register?”. If you have documentation proving an exemption, submit it to your school to save time. Contact the Selective Service at 847-688-6888 only after reviewing the SSS Web site information.</td>
<td>The Selective Service reported that you have not registered with them. If you are female or are not 18 through 25 years of age, registration is not required. Otherwise, to receive aid you must: (1) answer &quot;Male&quot; to Item 21 and &quot;Register Me&quot; to Item 22 on this SAR, (2) complete a Selective Service registration form at your local post office, or (3) register <a href="https://sss.gov">online</a>. If you believe you have already registered or are exempt, check the Selective Service <a href="https://sss.gov">Web site</a>. If you have documentation proving an exemption, submit it to your school.</td>
</tr>
<tr>
<td>039</td>
<td>To resolve your Federal Pell Grant overpayments, your Financial Aid Administrator must access NSLDS for additional Pell overpayment information.</td>
<td>Contact your Financial Aid Administrator to resolve your Pell overpayment.</td>
</tr>
</tbody>
</table>
myFAFSA – Two Processing Cycles

2019-20

Current Application Status: Not Submitted

The student's 2019-2020 FAFSA® form has been started but not submitted.

Would you like to continue? You can also start over, but doing so will delete all information that’s been entered so far.

2020-21

Current 2020-2021 Application Status: No FAFSA® Form on File

You have not started your 2020-2021 FAFSA form yet.

START A NEW FAFSA

Welcome first last

Please select your school year

2020-2021

2019-2020
myFAFSA Signature Process - Previous

• “A better signature capturing area or no signature required”
• “Just fixing the signature box”
• “Just the signature part; doesn't come out or actually 'look' anything like my signature”
• “I think the signature box was difficult on my cell phone. But I got it done”
READ BEFORE PROCEEDING:

By signing this application electronically using your FSA ID (username and password), YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one institution.

I, [first last], agree to the terms outlined above.

Submit
The "Continuing graduate/professional or beyond" response option is confusing for students and many of them choose it because they are high school graduates. They do not realize that they may be inadvertently stating that they have a Bachelor's Degree.
FAFSA Question 29
FAFSA Question 30

Please provide additional description after "Graduate or Professional degree". Every year we have a large number of graduating high school seniors erroneously select Graduate or Professional degree causing them to become independent on the FAFSA when they should be dependent.

Inserting the word “school” to yield “Graduate School or Professional School Degree” might reduce the error rate.
FAFSA Question 30

2019-20

2020-21
So far, we're (and other schools in our region) are seeing a significant increase (400%) in the number of families that are reporting "Combat Pay" vs. previous years.

We have over 80 families reporting combat pay for 2020 when last year we had roughly 20 for the entire year. Is there a greater issue going on related to this?

We have a dependent student whose parents linked their taxes and their ISIR has combat pay included. Neither parent has served in the military and received combat pay so there is a bigger issue here.

We have a family where the parent and student did not have combat pay and the combat pay is the same amount as the parent AGI and the student AGI. Both the parent and the student are having their AGI double reported as combat pay.
2019-20 FAFSA Question 93e

Parent Questions for Tax Filers Only

Did your father have any of the following items in 2017? Enter amounts for all that apply.

Combat pay or special combat pay. Only enter the amount that was taxable and included in your father’s adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 12, Code Q

0.00
Did your father have any of the following items in 2018? Enter amounts for all that apply.

Combat pay or special combat pay. This should be zero for enlisted persons and warrant officers (including commissioned warrant officers) because their combat pay is entirely nontaxable. Only enter taxable combat pay included in your father's adjusted gross income.
How much combat pay or special combat pay did your parents report in their adjusted gross income?

This is question 91e on the paper Free Application for Federal Student Aid (FAFSA®) form.

**Enlisted persons and warrant officers**—Combat pay is entirely nontaxable, and your parent(s) should report zero for combat pay or special combat pay.

**Commissioned officers**—To calculate the taxable amount, use the total combat pay from the leave and earnings statements of your parent(s) and subtract the untaxed portion, which is reported in box 12 of the W-2 form with code Q.

Round to the nearest dollar. Don’t include commas or decimal points.
IRS DRT

2019-20


49 GREEN MILLS TEST
United States
TOPEKA
California (CA)
98425

By submitting this information, you are identifying yourself to the IRS system and may result in civil and criminal penalties.

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*** - ** - 8925
07 / 28 / 1995
Head of Household
Mobile-responsive IRS DRT
Mobile-responsive IRS DRT

2018 Federal Income Tax Information
Ema Iewf

Based on the information you provided, the Internal Revenue Service (IRS) located your income tax return. With your permission below, the IRS will securely transfer your tax information to the U.S. Department of Education (ED) to populate any applicable FAFSA® questions.

For your protection, the IRS will not display your tax information and will further encrypt any tax information transferred using the IRS DRT; therefore, ED is unable to display your tax information on your FAFSA form.

The data retrieved from your tax return is limited to the items listed below as you reported to the IRS:

- Tax Year
- Name(s)
- Social Security Number
- Filing Status
- IRS Exemptions
- Type of Return Filed
- Adjusted Gross Income
- Income Earned from Work
- Income Tax
- Education Credits
- Untaxed Portion of IRA Distributions & Pensions/Annuities
- Tax-exempt Interest Income
- IRA Deductions and Payments
- Status of Amended Returns Received

Refer to your tax records if you have a question about the values you reported.

Transfer My Tax Information into the FAFSA Form

The tax information provided to fafsa.gov will populate the aneare to the appropriate FAFSA questions. After the FAFSA questions are populated, your IRS session will end, and you will return to your FAFSA form. Check this box if you are choosing to transfer your information.

Transfer Now

Do Not Transfer My Tax Information and Return to the FAFSA Form

By clicking the “Do Not Transfer” button, you are choosing not to transfer your tax information electronically. Your IRS session will end, and you will return to your FAFSA form.

Do Not Transfer
Application processing statistics
Changes required by external sources
Enhancements as a result of feedback
Continuous improvement
Continuous Improvements

- Planning for 2019 tax form changes
- Schedule 1 DRT question
- Usability studies
  - Mobile-responsive IRS DRT
  - Targeting specific areas of web/mobile FAFSA form to improve
    - Federal School Code search
    - High school search
    - Editing data prior to submission
The End