AGENDA

01 Introduction

02 FAFSA® Updates

03 FAFSA® Completion Data

04 FSA Next Gen Updates

05 What’s Next
FAFSA® UPDATES
IRS CHANGES

FAFSA form is being updated to reflect changes to the 2018 IRS tax forms.

• Addressing elimination of 1040A and 1040EZ.

• Removing exemptions questions.

• Combining untaxed pensions and untaxed portions of IRA distributions questions.

Exemptions questions (38 and 87 on 2019-20 FAFSA form) will be removed.

IRS has combined untaxed portions of IRA distributions with untaxed pensions on IRS forms.

• Untaxed IRA distributions questions (44e and 92e) will now also include untaxed pensions.
  • “Untaxed portions of IRA distributions and pensions from IRS Form 1040 – line 4a minus line 4b. Exclude rollovers. If negative, enter a zero here.”

Data elements that are currently transferred using the IRS Data Retrieval Tool (DRT) will continue to be transferred as long as the questions remain on the FAFSA form.
MODIFY TYPE OF TAX RETURN RESPONSE OPTIONS

- Type of tax return filed questions (33 and 80) will be modified to remove IRS 1040A or 1040EZ response.
- IRS forms 1040NR and 1040NR-EZ will be added to foreign tax return response.
The elimination of IRS Forms 1040A and 1040EZ required FSA to develop a reasonable proxy for automatic zero (AZ) and simplified needs test (SNT) calculations of the Expected Family Contribution (EFC).

- Questions 35 and 82 will be repurposed to ask “Did (or will) you file a Schedule 1 with your 2018 tax return?”
  - Exact wording of questions will be determined through FAFSA form clearance process.
Children of Fallen Heroes

- Financial Aid Administrators will identify applicants who qualify.
- FAA Access to CPS Online will be used to report eligibility to CPS.
- Flag will be carried on ISIR and comment set on SAR.
- COD will receive indicator to allow for proper awarding and disbursing of funds.
• The question order on FAFSA.gov is being updated to align with myStudentAid.

• The student’s SSN at log in will be masked on FAFSA.gov.

• The SAR will be available in myStudentAid.

• FSA is working with the IRS to make the Data Retrieval Tool (DRT) mobile-responsive version.
FAFSA® COMPLETION DATA
SUBMITTED APPLICATIONS THROUGH MAY 31

Oct. 1, 2016 - May 31, 2018

- 2017-18: 18,898,032
- 2018-19: 18,466,001

Oct. 1, 2017 - May 31, 2019

- 2017-18: 18,898,032
- 2018-19: 18,466,001
SUBMITTED APPLICATIONS THROUGH MAY 31

Oct 1, 2017 - May 31, 2018
- 2017-18
  - 12,771,709

Oct 1, 2018 - May 31, 2019
- 2018-19
  - 12,277,431

- 2019-20
  - 12,277,431
SUBMITTED APPLICATIONS FROM HIGH SCHOOL SENIORS

Oct. 1, 2018 - June 30, 2019
Oct. 1, 2017 - June 30, 2018

2019-20  2018-19
IRS DRT USE OCT. 1 – MAY 31

2018-19

- 52.57% Used DRT
- 47.43% Did not use DRT

2019-20

- 48.36% Used DRT
- 51.63% Did not use DRT
## APPLICATIONS BY INCOME

### TABLE 1: APPLICATIONS BY INCOME 2018-19 AND 2019-20 CYCLES

<table>
<thead>
<tr>
<th>INCOME</th>
<th>2018-19</th>
<th>PERCENTAGE</th>
<th>2019-20</th>
<th>PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $10,000</td>
<td>2,726,491</td>
<td>21.35%</td>
<td>2,448,019</td>
<td>19.94%</td>
</tr>
<tr>
<td>$10,000 - $19,999</td>
<td>1,736,590</td>
<td>13.60%</td>
<td>1,608,895</td>
<td>13.10%</td>
</tr>
<tr>
<td>$20,000 - $29,999</td>
<td>1,550,699</td>
<td>12.14%</td>
<td>1,466,178</td>
<td>11.94%</td>
</tr>
<tr>
<td>$30,000 - $39,999</td>
<td>1,195,630</td>
<td>9.36%</td>
<td>1,154,261</td>
<td>9.40%</td>
</tr>
<tr>
<td>$40,000 - $49,999</td>
<td>866,930</td>
<td>6.79%</td>
<td>845,819</td>
<td>6.89%</td>
</tr>
<tr>
<td>$50,000 - $59,999</td>
<td>670,759</td>
<td>5.25%</td>
<td>657,978</td>
<td>5.36%</td>
</tr>
<tr>
<td>$60,000 - $69,999</td>
<td>551,191</td>
<td>4.32%</td>
<td>542,104</td>
<td>4.42%</td>
</tr>
<tr>
<td>$70,000 - $79,999</td>
<td>475,405</td>
<td>3.72%</td>
<td>465,760</td>
<td>3.79%</td>
</tr>
<tr>
<td>$80,000 - $89,999</td>
<td>416,913</td>
<td>3.26%</td>
<td>410,656</td>
<td>3.34%</td>
</tr>
<tr>
<td>$90,000 - $99,999</td>
<td>364,459</td>
<td>2.85%</td>
<td>359,745</td>
<td>2.93%</td>
</tr>
<tr>
<td>&gt;= $100,000</td>
<td>2,216,642</td>
<td>17.36%</td>
<td>2,317,998</td>
<td>18.88%</td>
</tr>
<tr>
<td>SUM:</td>
<td>12,771,709</td>
<td>100.00%</td>
<td>12,277,413</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
NUMBER OF SCHOOLS LISTED ON FAFSA FORM

All Filers
- 75% listed 1 school
- 16% listed 2-4 schools
- 9% listed 5+ schools

Freshmen
- 50% listed 1 school
- 25% listed 2-4 schools
- 25% listed 5+ schools

NUMBER OF SCHOOLS LISTED ON FAFSA FORM

1 school  | 2-4 schools  | 5+ schools
---------|--------------|----------
75%      | 16%          | 9%       |

1 school  | 2-4 schools  | 5+ schools
---------|--------------|----------
50%      | 25%          | 25%      |
FAFSA® COMPLETION DATA BY HIGH SCHOOL & PUBLIC SCHOOL DISTRICT
WHAT DOES THIS DATA REFLECT?

- The data reflects the number of submitted and completed FAFSA® forms from applicants who are identified using several criteria to reflect likely high school seniors (first-time filing, entering college freshmen with high school diploma, who are no older than 19 years of age).

- Only numbers of submitted and completed FAFSA forms are available. No personally identifiable information for FAFSA filers is shared through this process.

- This is not student-level data. That data can only be accessed through an agreement with a state’s education agency.
Submitted applications include all FAFSA® forms submitted to Federal Student Aid. These applications, however, can be subsequently rejected by the Central Processing System if they are missing key pieces of information. Applications that are not rejected are referred to as completed applications.

Completed applications, therefore, are a subset of all submitted applications. If a FAFSA form is submitted but not complete, the student will receive an email from the Department of Education asking him or her to correct the FAFSA form. A completed FAFSA form is necessary to determine eligibility for federal student aid and often other forms of financial aid.
WHAT ARE THE TWO REPORTS?

Select FAFSA Data by State/Territory:

Alabama

Go

Completion Report Archives:

January 31, 2018

Go

Files ending in 18 year olds use the previous age assumption that applicants be no older than 18. All other files use the current assumption that applicants be no older than 19.
WHAT IS IN EACH REPORT?

- **FAFSA® Data by State/Territory**: This report contains data by high school and district. For each high school, the number of submitted and completed applications is reported for the current application cycle (2018-2019) and the previous application cycle (2017-2018) through the same calendar day.

- **Completion Archives**: Compares high school submissions and completions for the current and previous cycles through the same calendar month.

- Each file also has the previous cycle data through June 30th and December 31st.
**HIGH SCHOOL SUBMISSION DATA**

- The data is displayed in spreadsheets broken down by state or territory and includes the high school name and city.
- Additional tabs within each spreadsheet include estimates of public school district FAFSA® completion rates for both cycles as well as state level maps presenting this data.
- Importantly, the district level data only includes applicants reporting public high schools and does not consider private schools that are geographically within a district.

### Free Application for Federal Student Aid (FAFSA) Submissions by High School

Applications processed through May 25 of the first year of each cycle

<table>
<thead>
<tr>
<th>Name</th>
<th>City</th>
<th>State</th>
<th>2018/2019 Cycle</th>
<th>2017/2018 Cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Through May 25</td>
<td>Through May 25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Applications</td>
<td>Applications</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Submitted</td>
<td>Complete</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Through June</td>
<td>Applications</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Applications</td>
<td>Complete</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Through December</td>
<td>Applications</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Complete</td>
</tr>
<tr>
<td>ABBEVILLE CHRISTIAN ACADEMY</td>
<td>ABBEVILLE</td>
<td>AL</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td>ABBEVILLE HIGH SCH</td>
<td>ABBEVILLE</td>
<td>AL</td>
<td>29</td>
<td>25</td>
</tr>
<tr>
<td>ACCEL DAY AND EVENING ACADEMY</td>
<td>MOBILE</td>
<td>AL</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>ADDISON-HIGH SCH</td>
<td>ADDISON</td>
<td>AL</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>ALABAMA CHRISTIAN ACADEMY</td>
<td>MONTGOMERY</td>
<td>AL</td>
<td>59</td>
<td>59</td>
</tr>
</tbody>
</table>
From October through June, data releases are weekly for the data by State/Territory. For the remainder of the calendar year, data releases occur every other Friday. Archive files are posted monthly.

For high schools to track their progress, Federal Student Aid regularly updates estimates for the first 15 months of an application cycle.
HOW DO I GET TO THE DATA?

Search “FAFSA® Completion by High School” on any of the following sites:

- StudentAid.gov
- FinancialAidToolkit.ed.gov
- Google
FSA NEXT GEN UPDATES
A blueprint for transforming every aspect of federal financial aid—from application through student loan repayment—for millions of students, parents, and borrowers

Program Goals

- Improve customer experience
- Modernize the technology and operational components that support the federal student aid programs, products, and services

2018 Next Gen Program Achievements

- Launched FSA’s first-ever mobile app, myStudentAid
- Provided ability to complete the FAFSA® via the myFAFSA component within myStudentAid mobile app
- Mobile-optimized fafsa.gov
We have also improved the myStudentAid mobile app for the next FAFSA® application cycle. Some notable improvements include:

- Renamed the School Search button
- Removed the State of Legal Residence guidance view
- Added “Student” to the headers for Sections 2 and 3
- Updated the Log In page with language to remind a user what role they are logging in as
- Updated the signature process from a swipe signature to a checkbox at the end of the terms and conditions
- Masked a student’s SSN at login
- Updated the edit text to be role-based
- Enabled push notifications
- myFAFSA checklist views now show what role the user is logged in as
- myChecklist provides users with guidance regarding student aid next steps
myStudentAid MOBILE APP

Log In page updated with the role a user is logging in as.

Student’s SSN masked at login.

Edit text now role-based (i.e., the student’s first name).

Signature process updated from a swipe signature to a checkbox at the end of the terms and conditions.

Student’s SSN masked at login.

Edit text now role-based (i.e., the student’s first name).

Signature process updated from a swipe signature to a checkbox at the end of the terms and conditions.
myStudentAid MOBILE APP

- myFAFSA checklist shows the logged in user’s role.
- School Search button renamed.
- Push notifications enabled.
myStudentAid MOBILE APP

myChecklist provides users with guidance regarding student aid next steps.
Within Next Gen, we are developing the Digital & Customer Care Platform (DCC) solution to optimize and improve customer experience.

**DCC Goals**
- To enable a world-class customer experience with FSA products and servicers across the student aid life cycle
- To ensure our customers are informed about their options, understand their obligations, and are satisfied with their federal student aid experience
- To encourage customers to use the mobile/digital/automated self-service technology

**DCC Objectives**
- Digital: Deliver a new, enterprise-wide, FSA-branded digital platform
- Customer Care: Consolidate and enhance customer care capabilities across phone, chat, virtual assistant, email, text, and social channels onto a single platform enabling an omni-channel experience
- Communications: Streamline and personalize customer communications and outreach
FSA REMINDERS

FSA Webinar
• Federal Policy Update Thursday, September 12, 2019 at 1:30 p.m. EST
• Archived webinars can be found at StudentAid.ed.gov/sa/resources.

FSA Partner Emails
• Sign up at FinancialAidToolkit.ed.gov; under the CONTACT US page