Helping students navigate the financial aid process
Introductions

**Jenni Kimball**
*Education Impact Manager*, Treasure Valley Education Partnership *(former college/career counselor, Nampa School District)*

**Julie Bu**
*Director*, Boise State University TRIO Educational Talent Search

**Dana Kelly**
*Student Affairs Program Manager*, Idaho State Board of Education
Who’s in the room?

Please share:

1. Your name

2. Hopes & expectations for today’s session
Session Goal & Outcomes

Goal:

Prepare educators, counselors, school staff, and other student service providers to help students complete college applications and the FAFSA

Outcomes:

● Provide updates on 2016 College Application Week & SBOE scholarships

● Describe changes to the 2017-18 FAFSA and implications for practitioners

● Share best practices for implementation
Idaho College Application Week
Oct. 31 – Nov. 4, 2016

“Sometimes a student going to college is as simple as someone helping them to apply” (J. Watts, 2010)
The Basics:

- Occurs in Fall of the Senior year
- Takes place during the school day
- Costs are low – volunteers
- Requires collaboration (K-12/HE)
- Utilizes existing networks and infrastructure
- Builds “College Going Culture/Expectation”
Goal: Every H. S. Senior completes at least one College Application during the event!

Pilot Year was 2013
- 21 High Schools participated and 2,369 seniors completed 3,672 applications

2014
- 41 High Schools participated and 4,422 seniors completed 7,239 applications

2015
- 59 High School participated and 6,972 seniors submitted 10,098 college applications!

2016
- 101 High Schools and 14,686 seniors!
Tips for a successful CAW

- Tell students to memorize/bring SSN before the event
- Must have computer & internet access
- Give instructions or a handout to keep students engaged
- Post in the room: Graduation date, SAT test date, School address, School Code
- Have available: student transcripts, ACT/SAT scores, NACAC fee waiver forms
**Name:**

**Directions:** After you complete each item on the checklist, have a CHS staff person initial in the space below. Turn the completed checklist in to the counselor for the College Application Raffle.

<table>
<thead>
<tr>
<th>TASK</th>
<th>Staff Initial</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Complete at least one college application</td>
<td></td>
</tr>
<tr>
<td>☐ Submit the CAW Survey (use link or QR code)</td>
<td></td>
</tr>
<tr>
<td>☐ Fill out the Transcript Request Form</td>
<td></td>
</tr>
<tr>
<td>☐ Take an “I applied” picture and post it to social media  #iapplied</td>
<td></td>
</tr>
<tr>
<td>☐ Sign the “sign out” sheet and list all colleges where you applied</td>
<td></td>
</tr>
<tr>
<td>☐ Apply for your FSA ID-  <a href="https://fsaid.ed.gov/">https://fsaid.ed.gov/</a></td>
<td></td>
</tr>
</tbody>
</table>
Things to consider

1. Check your school calendar for conflicting events (assemblies, musicals, etc)
2. In-class, as an assignment is best practice (Econ, Gov’t, Sr English)
3. Publicize the goal and celebrate accomplishments!
1. Idaho Opportunity Scholarship (up to $3,000/year)
   a. 3.0 cumulative GPA
   b. Complete the FAFSA by March 1st 2017
   c. Online application opens OCTOBER 1st 2016

2. Idaho Governor’s Cup Scholarship ($3,000/year)
   a. 2.8 cumulative GPA
   b. Focus on community service and personal statement
Other scholarships

1. Institutional Scholarships
   - BSU - Feb 15
   - U of I - Dec. 1
   - CWI - ?
   - TVCC - March 15
   - ISU - Feb. 15
   - LCSC - March 1

2. Lightfoot Foundation
   - 2.5 GPA
   - Family income less than $95,000
   - Due April 15th
Navigating the financial aid process
What’s changing for 2017-18?

1. Students will be able to submit a FAFSA earlier! Students can submit a 2017-18 FAFSA starting **Oct. 1st 2016**
Students will use earlier income and tax information

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:

<table>
<thead>
<tr>
<th>IF YOU PLAN TO ATTEND COLLEGE FROM</th>
<th>YOU WILL SUBMIT THIS FAFSA</th>
<th>YOU CAN SUBMIT THE FAFSA FROM</th>
<th>USING INCOME AND TAX INFORMATION FROM</th>
</tr>
</thead>
</table>

StudentAid.gov/fafsa
Why changes are being made

1. **Alignment**
   
   Same time as the college application process

1. **Certainty**
   
   No more need to estimate income information. Families will have a more accurate idea of their anticipated financial aid and college costs.

1. **Less pressure, more time**
   
   More time to apply before state and school deadlines
Frequently asked questions

1. Will college financial aid priority deadlines stay the same?

   *It depends. Check with college financial aid offices or your admission rep*

2. Can a student choose to report different tax year info if the family situation has changed?

   *No. The student must report the information the FAFSA asks for. If the family’s income has changed substantially, the student will need to go through an appeal process with the college financial aid office.*

3. Will students receive financial aid offers from colleges earlier?

   *It depends on the college or university but most likely not this year*
Special Circumstances/Professional Judgment
(Could apply to 2016, 2017 or 2018 tax years)

- Colleges’ Financial Aid offices have the ability to recalculate an EFC based on significant hardships or new information

- Examples:
  - Significant reduction of income/loss of job
  - Death
  - Abuse
  - Divorce/Separation
  - One-time settlement income
  - Student marriage

If a student or family finds themselves in this situation, advise them to call the college financial aid office!
Special Circumstance: Marital Status

Scenario: Student’s mother is unmarried in 2015. Filed Head of Household on 2015 tax forms. Student’s mother married in 2016.

- 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.

  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.
Tips to make the FAFSA easier to complete

1. Inform students and parents early about the FSA ID (replaced PIN)
2. Help students create FSA ID (in-class assignment is best)
3. Help parents create one at back to school night or parent teacher conferences
Use IRS Data Retrieval Tool

- Easiest way to ensure FAFSA contains accurate tax information
- Transfers data from federal income tax returns into FAFSA form
- Parent needs a FSA ID to use Data Retrieval tool
- Link to IRS Data tool is embedded in the FAFSA
- Will be used more frequently now with Prior-prior year tax information being requested
Parent Tax Information

- Attention! You must provide financial information from your parents' 2015 tax return on the following pages.

- Application was successfully saved.

For 2015, have your parents completed their IRS income tax return or another tax return?
- Already completed

For 2015, what is your parents' tax filing status according to their tax return?
- Married-Filed Joint Return

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

Did you, the parents, file a Form 1040X amended tax return for 2015?
- Yes
- No

Did you, the parents, 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

Help and Hints

Fae a Puerto Rican or Foreign Tax Return?

If you, the parent(s), 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.?
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>m</td>
</tr>
<tr>
<td>Last Name</td>
<td>FSA</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>*** - ** - 1415</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>11 / 10 / 1980</td>
</tr>
<tr>
<td>Filing Status</td>
<td>Married-Filed Joint Return</td>
</tr>
<tr>
<td>City, Town or Post Office</td>
<td></td>
</tr>
<tr>
<td>State/U.S. Territory</td>
<td>Select One</td>
</tr>
<tr>
<td>ZIP Code</td>
<td></td>
</tr>
</tbody>
</table>
### Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

**Enter the following information from your 2015 Federal Income Tax Return.**

*Required fields *

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>GDIT</td>
</tr>
<tr>
<td>Last Name</td>
<td>data</td>
</tr>
<tr>
<td>Social Security Number</td>
<td>*** - ** - 2656</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>01/01/1992</td>
</tr>
<tr>
<td>Filing Status</td>
<td>Married-Filled Joint Return</td>
</tr>
<tr>
<td>Street Address</td>
<td>4050 ALPHA RD TEST</td>
</tr>
<tr>
<td>P. O. Box</td>
<td></td>
</tr>
<tr>
<td>Apt. Number</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>City, Town or Post Office</td>
<td>farmers branch</td>
</tr>
<tr>
<td>State/U.S. Territory</td>
<td>Texas (TX)</td>
</tr>
<tr>
<td>ZIP Code</td>
<td>75244</td>
</tr>
</tbody>
</table>

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person’s information may result in civil and criminal penalties.

[Return to FAFSA](#)  [Submit](#)
## Parent 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

<table>
<thead>
<tr>
<th>My Tax Information</th>
<th>FAFSA Question Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Year</td>
<td>2015</td>
</tr>
<tr>
<td>Name(s)</td>
<td>Gitit Data</td>
</tr>
<tr>
<td>Social Security Number</td>
<td><strong>-</strong>-2656</td>
</tr>
<tr>
<td>Filing Status</td>
<td>Married - Filled Joint Return</td>
</tr>
<tr>
<td>Type of Tax Return Filed</td>
<td>1040</td>
</tr>
<tr>
<td>Adjusted Gross Income</td>
<td>$33,400</td>
</tr>
<tr>
<td>Income Earned From Work</td>
<td>$35,430</td>
</tr>
<tr>
<td>Income Tax</td>
<td>$8,900</td>
</tr>
<tr>
<td>IRS Exemptions</td>
<td>1</td>
</tr>
<tr>
<td>Education Credits</td>
<td>$5,900</td>
</tr>
<tr>
<td>IRA Deductions and Payments</td>
<td>$4,400</td>
</tr>
<tr>
<td>Tax-Exempt Interest Income</td>
<td>$4,650</td>
</tr>
<tr>
<td>Untaxed IRA Distributions</td>
<td>$7,900</td>
</tr>
<tr>
<td>Untaxed Pensions</td>
<td>$6,900</td>
</tr>
</tbody>
</table>

Print this page for your records before choosing an option below.

---

**Transfer My Tax Information into the FAFSA**

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA.

Check this box if you are choosing to transfer your information.

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

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.

You may still use this tax information to input the data into your FAFSA.

IRPS Privacy Policy
Make sure the student submits the correct FAFSA
There’s so much! Where do I start?

TO-DO LIST:
1. EVERYTHING
Ideas for implementation

Form a Go On task force (team)

• District and school level (Principal, teachers, students, parents, alumni)
• Set goals around CAW, FAFSA, IOS
• Meet monthly
• Track and frequently monitor your numbers, follow up
Combine the initiatives into one big campaign- November is Go On month!

- **Find incentives**: coffee cards, free/discounted dance tickets, swag from colleges
- **Staff buy-in**: publicize the goal, work with teachers, wear college t-shirts, classroom reminders, Lunch & Learn
- **Partner with a classroom teacher**
Host FAFSA Completion events at your school or in the community (or both)

- Provide space and assistance to help families complete the FAFSA
- Invite college admissions reps and financial aid advisors, TRiO partners, Spanish speakers if needed, alumni
- Provide food and child care if possible
- Fall and Winter events
- Saturday event- give each senior a set Appointment Time”
- Parent volunteers call other parents
- Hold a FAFSA Pep Rally
- FAFSA Finish Line Week
- Student Ambassadors
- Advertise on Radio, TV, Community Events page
Using student level FAFSA data

- NEW online portal that provide a list of students who have submitted/completed the FAFSA-
  https://fafsa.highered.colorado.gov/Reports/Summary

- Must sign data agreement form from SBOE, scan & email to Andy.Mehl@osbe.idaho.gov

- Use the list to target students who have not completed or who have submitted but not completed
Other ideas to increase completion

• Screensavers on school computers with FAFSA messaging
• Make announcements at football, volleyball, basketball games to remind parents
• Use texting services such as “Remind”
• Discount on Homecoming/prom tickets for completing the FAFSA
• T-shirts for counselors and volunteers to wear at FAFSA events
• Involve your town mayor for a “FAFSA kick off event”
• Partner with churches to host events or distribute materials
• Hand out FSA ID/FAFSA change info at Registration, Back to School Night, Open House, Parent-teacher conferences
• Federal aid Web Banners on websites
One-on-one help works best

Need to brush up on your FAFSA skills?

Attend a u-aspire training!

Webinar: College Affordability Planning
October 20th 8:30 am - 9:30 am
Register: http://goo.gl/sVDWIB
Where to find resources/materials

Financial Aid/FAFSA resources:

• Cash for College Handbook- [https://sites.google.com/site/cashforcollegeidaho/home](https://sites.google.com/site/cashforcollegeidaho/home)
• Federal Student Aid- [https://studentaid.ed.gov/sa/](https://studentaid.ed.gov/sa/)
• Next Steps Idaho- [https://nextsteps.idaho.gov/](https://nextsteps.idaho.gov/)
• Help for homeless students - [http://www.naehcy.org/educational-resources/higher-ed](http://www.naehcy.org/educational-resources/higher-ed)
• Form Your Future- [http://formyourfuture.org/](http://formyourfuture.org/)
Questions?