FAFSA® 2020-21 Update

2019 NASFAA National Conference
June 26, 2019 3-4 p.m.

Misty Parkinson and Austin Hall
U.S. Department of Education
Key Staff Introductions

Misty Parkinson

Austin Hall
Agenda

What we’ve been working on

Application Processing statistics

What’s coming up
What we’ve been working on

Application Processing statistics

What’s coming up
What we’ve been working on (FAFSA.gov)

Summer 2018

Fall 2018

Winter 2019
Phase 1 – Making FAFSA.gov mobile responsive

• Parts of FAFSA.gov became mobile-friendly.
  • FAFSA.gov home and log in pages
  • Initial and renewal FAFSA form
  • Help and Hints replaced with Tool Tips
FAFSA.gov mobile device view

FAFSA.gov mobile device view includes options for Application Options, My FAFSA Progress, Student Address and Email, and various student information sections such as permanent mailing address, city (and country if not U.S.), state, and ZIP code. It also features options for Exit, Clear All Data, View FAFSA Summary, Save, and Help.
What we’ve been working on (FAFSA.gov)

Summer 2018
Fall 2018
Winter 2019
October 2018

- FAFSA home and help pages migrated to StudentAid.gov.

- Tool tip text resides on StudentAid.gov and features feedback option.

- Feedback is being used to improve text.
FAFSA.gov Homepage

Desktop View

FAFSA®: Apply for Aid

Use the Free Application for Federal Student Aid (FAFSA®) form to apply for financial aid for college or grad school.

NEW TO THE FAFSA® PROCESS?
Completing the FAFSA form is free. Fill it out now.

RETURNING USER?
Correct info • Add a school
View your Student Aid Report (SAR)

START HERE
LOG IN

FAFSA® Announcements
- The 2019-20 FAFSA form is here! Some states and schools have limited funds, so submit your application today. Also, check out the new myStudentAid app for iOS and Android.

The FAFSA form will be unavailable due to scheduled maintenance every Sunday from 2-7 a.m. Eastern time.

Mobile Device View

FAFSA®: Apply for Aid

Use the Free Application for Federal Student Aid (FAFSA®) form to apply for financial aid for college or grad school.

NEW TO THE FAFSA® PROCESS?
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START HERE

RETURNING USER?
Correct info • Add a school
View your Student Aid Report (SAR)

LOG IN
Enter your FSA ID username. If you verified your email address or mobile phone number during account creation, you can enter your email address or mobile phone number instead of your username.

**Note:** Your FSA ID email address may be different from your FAFSA email address.

This field is not case-sensitive. If you have forgotten your username, select “Forgot Username.”

**Related Topic**

What is an FSA ID, and will I need it to complete the FAFSA? →
What we’ve been working on (FAFSA.gov)

- Summer 2018
- Fall 2018
- Winter 2019
Phase 2 – Making FAFSA.gov mobile responsive

• More FAFSA.gov features became mobile-friendly.
  • Student Aid Report (SAR)
  • Standalone signature process
  • Standalone school code search
  • FAFSA4caster
The SAR summarizes the information you submitted on your 2019-2020 Free Application for Federal Student Aid (FAFSA).

Application Receipt Date: 10/01/2018
Processed Date: 10/02/2018
XXXX-0001 DE 03
EFC: 1643 C
DRN: 7353

Comments About Your Information

Learn about federal tax benefits for education, including the American Opportunity Tax Credit (AOTC).

Based on the information we have on record for you, your EFC is 1643. You may be eligible to receive a Federal Pell Grant and other federal student aid. Your school will use your EFC to determine your financial aid eligibility for federal grants, loans, and work-study, and possible funding from your state and school.

There is a limit to the total amount of Federal Pell Grants that a student may receive, which is the equivalent of 6 school years. Based on information reported to the National Student Loan Data System (NSLDS) by the schools you have attended, you have received Pell Grants for the equivalent of up to one half of a school year.

WHAT YOU MUST DO NOW (the checklist below to make sure that all of your issues are resolved.)

The National Student Loan Data System (NSLDS) indicates that you are in DEFAULT on one or more federal student loans. You are not eligible to receive any federal student aid until you resolve any loan default(s).

Contact the following agency/ies regarding your defaulted or fraudulent federal student loans:

Rhode Island Higher Education Assistance Authority, 1-800-333-2314 (RIA 744)

If you need to make corrections to your information, click 'Make FAFSA Corrections' on the My FAFSA page using your FSA ID. If you need additional help with your SAR, contact your school's financial aid office or click the Help/faq icon on the FAFSA home page. If your mailing address or e-mail address changes, you can make the correction online.

Based on your EFC of 1643, you may be eligible to receive a Federal Pell Grant of up to $4,445 for the 2019-2020 school year provided you have not met or exceeded the lifetime loan amounts established for the Federal Pell Grant program.
FAFSA.gov Standalone Signature Process

Desktop View

Mobile Device View

Signature Status

You must sign your FAFSA. Click Provide Student Signature to sign your FAFSA.

Student Signature Needed

Signature Status: Unsigned

PROVIDE STUDENT SIGNATURE

Signature Status

You must sign your FAFSA. Click Provide Student Signature to sign your FAFSA.

Student Signature Needed

Signature Status: Unsigned

PROVIDE STUDENT SIGNATURE
• FAAs now have the ability to “Resend Record to Matches.”

• Instructional webinars are available now, with additional video series in the works!
What we’ve been working on (myStudentAid)

- Summer 2018
- Fall 2018
- 2019
August 2018

- Launch of the beta version of the mobile application!
  - Applicants able to begin, complete, and submit an initial FAFSA form for 2018-19.
  - Offered customized experience based on “role.”
  - Offered same data protections as FAFSA.gov.
What we’ve been working on (myStudentAid)

- Summer 2018
- Fall 2018
- 2019
October 2018

• Full version of the app launched!
  • Users can submit renewal applications.
  • Students and parents able to use IRS DRT to electronically transfer federal tax return information.
  • Students and parents from IA, MN, MS, NJ, NY, PA, and VT eligible to transfer their FAFSA information into a state aid application.
  • Students and parents able to view additional information about schools they selected on FAFSA form for easy comparison.
myStudentAid Mobile App

Welcome to myStudentAid
Federal Student Aid

Need money for college?
Submitting the 2019-2020 FAFSA® form is quick, and most importantly, it’s FREE.

START HERE

Before You Start
Customers using an Apple device may encounter some errors if the “smart punctuation” feature is enabled. You can disable this feature by going to Settings> General> Keyboards, and toggling Smart Punctuation to “off.”

If you want to complete your 2018-2019 FAFSA form, visit fafsa.gov.

Tell us who you are.

I am the Parent

I am the Student

I am a Preparer

myStudentAid
Federal Student Aid

You are logging in as the Student

FSA ID Username, Email, or Mobile #

Forgot username?

FSA ID Password

Forgot password?

LOG IN

Create an FSA ID account
Learn more about the FSA ID
myStudentAid Mobile App

Welcome to the 2019-2020 FAFSA®!
It’s easy to complete, and we promise to guide you the whole way.

- Section 1. Student Information
- Section 2. Student School Selection
- Section 3. Student Dependency Status
- Section 4. Parent Information
- Section 5. Parent Financials
- Section 6. Student Financials
- Section 7. Sign & Submit

Next

Parent Financials

Accurate parent tax return information from
the IRS Data Retrieval Tool (IRS DRT) helps
to ensure that you receive a more precise
financial aid package!

We saved your FAFSA® form so you can log out now and
have your parent log in to use the IRS DRT.

How do you want to proceed?

I’ll log out and have my parent use the IRS DRT

I’ll continue to manually provide my parent’s tax
information

Student Financials

Accurate student tax return information
from the IRS Data Retrieval Tool (IRS DRT)
helps to ensure that you receive a more
precise financial aid package!

Use the IRS DRT now to transfer your tax return
information into your FAFSA® form. For your protection,
your tax return information will not display on the IRS
website or in the FAFSA form.

How do you want to proceed?

I’ll use the IRS DRT

I’ll manually provide my tax information
What we’ve been working on (myStudentAid)

- Summer 2018
- Fall 2018
- 2019
• School search button renamed.
• State of Legal Residence guidance view removed.
• “Student” added to the headers for Sections 2 and 3.
• Log in page updated with language to remind user what role they are signing in as.
• Signature process updated from a swipe signature to a checkbox at the end of the terms and condition.
• Student’s SSN masked at log in.
• Edit text now role based.
myStudentAid Mobile App

![myStudentAid Mobile App](image)

**Parent Agreement of Terms**

By signing this application or any document related to the federal student aid programs electronically using a username and password, you certify that you are the person identified by the username and password, and have not disclosed that username and password to anyone else. If you purposely give false or misleading information, you may be fined up to $20,000, sent to prison, or both.

1. I certify that the information I have provided is true and complete to the best of your knowledge and you agree, if asked:
   1. to provide information that will verify the accuracy of your completed form
   2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

Federal Student Aid

P.O. Box 881
Washington, D.C. 20044-0881

www.StudentAid.gov

1-800-4-FED-AID

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June 2019

- myChecklist provides users with guidance regarding student aid next steps.
- myFAFSA checklist views now show what role the user is logged in as.
- Push notifications now enabled.
myStudentAid Mobile App

Welcome to the myStudentAid app. You’ve completed a milestone!

Need money for college? Welcome NASFAA Mickey’s in the House! Let’s Party!

Before You Start

The IRS Data Retrieval Tool will be unavailable from May 25 at 8pm to 7am Eastern time May 26. Students can still complete and submit a FAFSA® form by entering the necessary tax return information manually.

Customers using an Apple device may encounter some errors if the “smart punctuation” feature is enabled. You can

Federal Student Aid
Proud Sponsor of the American Mind®
myStudentAid Mobile App

Track your progress!
Use these checklists to find out your next steps. Learn more about how we save your progress.

- I am Considering College
- I am Applying for Aid
- I am Signing my Promise to Repay (MPN)
- I am In College
- I am Repaying my Loans

Before senior year:
- Estimate your financial aid with FAFSA4caster
- Save for college and create a budget
- Talk to counselors and other mentors about your options
- Learn about the FAFSA process
- Create an FSA ID for yourself

CLEAR ALL  SAVE
What we’ve been working on

Application Processing statistics

What’s coming up
Submitted Applications through May 31

Oct. 1, 2016 - May 31, 2018
18,898,032

Oct. 1, 2017 - May 31, 2019
18,466,001

2016-17  2017-18  2018-19
Submitted Applications through May 31

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

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

2018-19
2019-20
Submitted Applications from High School Seniors


- 2019-20
- 2018-19
# 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><strong>Sum:</strong></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**
- 1 school: 16%
- 2-4 schools: 75%
- 5+ schools: 9%

**Freshmen**
- 1 school: 50%
- 2-4 schools: 25%
- 5+ schools: 25%
myStudentAid Downloads

Total App Downloads: 849,025

- iOS Downloads: 522,585
- Android Downloads: 326,440

Average Rating:
- iOS: 3.2
- Android: 4

Operating System Downloads:
- iOS: 61.6%
- Android: 38.4%

Note: App downloads are based on device installs for the MyStudentAid app with 2019-20 FAFSA. It does not include updates or redownloads.

Source: iTunes App Store and Google Play Store
What we’ve been working on

Application Processing statistics

What’s coming up
2020-21 Processing Cycle and Beyond

- 2020-21 Start Up
- Potential Enhancements
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
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.
Schedule 1 Question

• The elimination of IRS Forms 1040A and 1040EZ required FSA to develop a reasonable proxy for automatic zero (AZ) and simplified needs test (SNT) EFC calculations.

  • 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.
IRS Changes

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

• IRS has combined untaxed portions of IRA distributions with untaxed pensions on IRS forms
  • Untaxed IRA distributions questions (44e & 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.”
IRS Changes

• Data elements that are currently transferred using the IRS DRT will continue to be transferred as long as the questions remain on the FAFSA.
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.
2020-21 Processing Cycle and Beyond

2020-21 Start Up

Potential Enhancements
myFAFSA Potential Enhancements

- Tracking of mobile app submissions.
- Availability of limited corrections.
- IRS DRT becoming mobile responsive.
Continuous Improvements

• Our focus is on improving the user experience.

• Utilizing feedback from usability testing, surveys, and other sources, we identify areas with opportunities for improvement.

• We are committed to modernizing our products.