Processing Updates and the 2020-21 FAFSA® Form

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2019-2020 FAFSA ®

FAFSA on the Web Worksheet

- Available on StudentAid.gov, IFAP and on FAFSA on the Web.

- Orders will no longer be taken to mail the FAFSA on the Web Worksheet for 2019-2020.

- Electronic PDF worksheet prepares applicants for the online application process <u>only</u>.

2019-2020 FAFSA® Changes

Updated Look and Feel: to improve user experience from all types of devices

- Users will receive error notifications immediately upon moving off a given field rather than after reaching the end of the page.

The 2019-2020 FAFSA colors are yellow for student information and purple for parents

FAA Access to CPS Online

School's Primary Destination Point Administrator (DPA) needs to annually confirm FAA Access to CPS Online Services

- Monitor IFAP for announcements regarding active confirmation requirements
- Access could be revoked
- All FAA Access users must have an FSA ID and password and a register token device for a one-time password to login
- R2T4 on the Web moved to COD

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Children of Fallen Heroes Scholarship

- 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

Need Analysis Income Threshold

The income threshold for the automatic zero EFC has increased from 25,000 to 26,000 for the 2019-2020 Award Year.

- May 1, 2018 Federal Register Notice - 2019-2020 Need Analysis Tables
- EFC Formula Guide posted August 20, 2018

- No significant changes made to the text of the SAR/eSAR Acknowledgements and the SAR Comment Code Text

System Access for Professional Users

On June 16, 2019, several user access changes for the systems and websites behind Federal Student Aid's Access and Identity Management System (AIMS) were implemented

- User access to a system will be disabled if a user does not access a specific system for 90 calendar days
- After 365 calendar days of inactivity in a specific system, access will be permanently deactivated
- A new monthly report is available - Primary Destination Point Administrators (DPAs) monitor the activity status of all institutional users in the Primary DPA's portfolio.

System Access for Professional Users

- The number of days of inactivity will reset to zero when the user logs in to that specific system; however, the number of days of inactivity for other authorized systems will **not** reset to zero.
- A user that loses access to a system due to 90 days of inactivity will receive an error message when attempting to log in to that system.
- In order to restore system access, the user must call the customer service center of the system behind AIMS that the user needs to access.

SAVE System

A new link on IFAP (top right corner) has been established under "Information Pages" that leads to all things related to DHS-SAVE, Eligible Noncitizen.

- To create an account, see Electronic Announcement posted December 6, 2018 for version 2.0 SAVE Instructions
  - ❖ DHS-SAVE Help Desk 877-469-2563
  - ❖ SAVE.Help@uscis.dhs.gov

- Policy questions or to reset primary DPA SAVE passwords: applicationprocessingdivision@ed.gov

2020-21 FAFSA® Form

Creating a Better User Experience

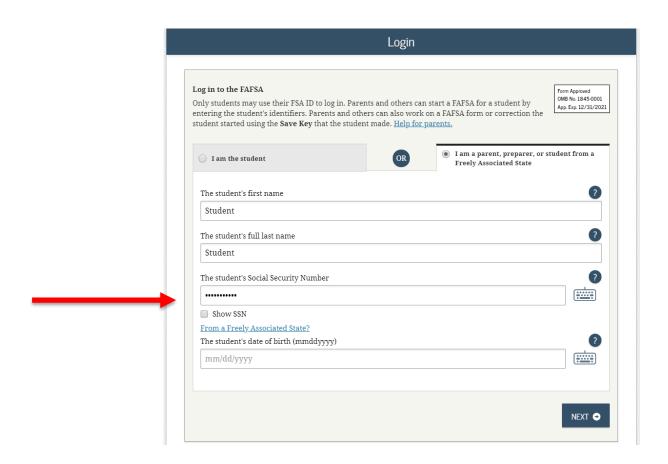Flow of fafsa.gov will be synchronized to align with myFAFSA

Protecting Applicant Privacy

Social Security number (SSN) will be masked by default on Login view

Users will have option to display SSN

Protecting Applicant Privacy

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Tracking myFAFSA Submissions

- Internally tracking mobile app submissions beginning 10/01/19

- Later in the processing cycle, will add the transaction source to the ISIR

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myFAFSA Enhancements

- SAR will be available in myFAFSA

- SAR comments will be tailored to correspond with role in which user is logged in to the mobile app

- Will have two processing cycles available

2018 Tax Form Changes

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

- Eliminated references to1040-A/EZ
- Added Schedule 1 question
- Removed exemptions questions
- Adjusted Foreign Tax return type answer response
- Combined untaxed pensions and untaxed portions of IRA distributions questions

Elimination of 1040-A/EZ

- Type of tax return filed questions (33 and 80) modified to remove eliminated forms

- Eligible to file 1040-A or 1040-EZ questions (35 and 82) replaced with Schedule 1 question

Schedule 1 Question

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

- Questions 35 and 82 repurposed to ask whether the applicant or parent did or will file a Schedule 1 with their 2018 tax return

IRS Changes

- Exemptions field eliminated on tax forms, therefore exemptions questions (38 and 87 on 2019-20 FAFSA form) were removed

- Addition of IRS Form 1040-NR and 1040-NR-EZ to response options for type of tax return filed questions (33 and 80)

IRS DRT and Forms 1040-NR/NR-EZ

If someone indicates they filed an IRS Form 1040 and uses IRS Data Retrieval Tool (DRT) but IRS indicates user filed IRS Form 1040NR/NR-EZ

- System treats it as a foreign tax return and therefore not eligible to have used IRS DRT

- IRS data does not get transferred

- Messaging displays indicating no data transferred and user must manually provide data

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."

2020-2021 MyStudentData

Availability of MyStudentData Download Guide for the 2020–21 FAFSA form – Electronic Announcement
June 7, 2019

- Allows students to download processed results from their FAFSA form into a machine-readable, plain text file.

- This function is available to students with a valid FSA ID for whom a FAFSA form has been processed.

Improvements

Notable changes resulting from FAFSA® form public comment period

- Income tax paid – adding language to report zero if taxes paid is negative number

- Assets – adding language to exclude ABLE (Achieving a Better Life Experience) accounts from assets

- Other untaxed income – adding language that untaxed foreign income not taxed by any government should be reported as untaxed income in questions 44h and/or 92h

- Questions 29 and 30 will be modified to provide more clarity

Improvements

IRS Data Retrieval Tool (DRT)

- Mobile-responsive version

- Data elements retrieved

Improving user experience

- Utilizing feedback from user experience testing, surveys and other sources to identify areas for improvement

Training Feedback

To ensure quality training, we ask all participants to please fill out an online session evaluation

- All registrants for this session will receive an email with a link to an electronic evaluation that we ask you to complete

- This feedback tool will provide a means to educate and inform areas for improvement and support an effective process for "listening" to our customers

Please register now for this Federal Training Session by entering this URL address on your phone or mobile device

https://cvent.me/kMMKQN

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Ask A Fed Goes Online!

FSA has implemented a new resource to assist Financial Aid Administrators obtain guidance about the FSA programs. Based on the popularity and effectiveness of the Ask A Fed desk at the annual FSA Training Conference, we have instituted a similar process using email.

Please send your inquiries about Title IV regulations to AskAFed@ed.gov.

The Ask A Fed email box is staffed every business day by a team of FSA Training Officers ready to assist schools with their questions.