

# NEW ORLEANS

N A S F A A   C O N F E R E N C E   2 0 0 2

The NASFAA Conference 2002 ♪ July 21-24 ♪ New Orleans, LA



**FSA**  
F E D E R A L  
S T U D E N T A I D

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# ***2003-04 Application Processing System Update***



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# 2003-04 Application Processing System Update Agenda

- Application Processing Statistics
- Important Dates
- The 2003-04 Application Process
  - I. Getting Ready for 2003-04
  - II. Applying for Aid
  - III. Receiving and Reviewing Application Data
  - IV. Correcting Application Data
- Other Changes and Noteworthy News
- Questions

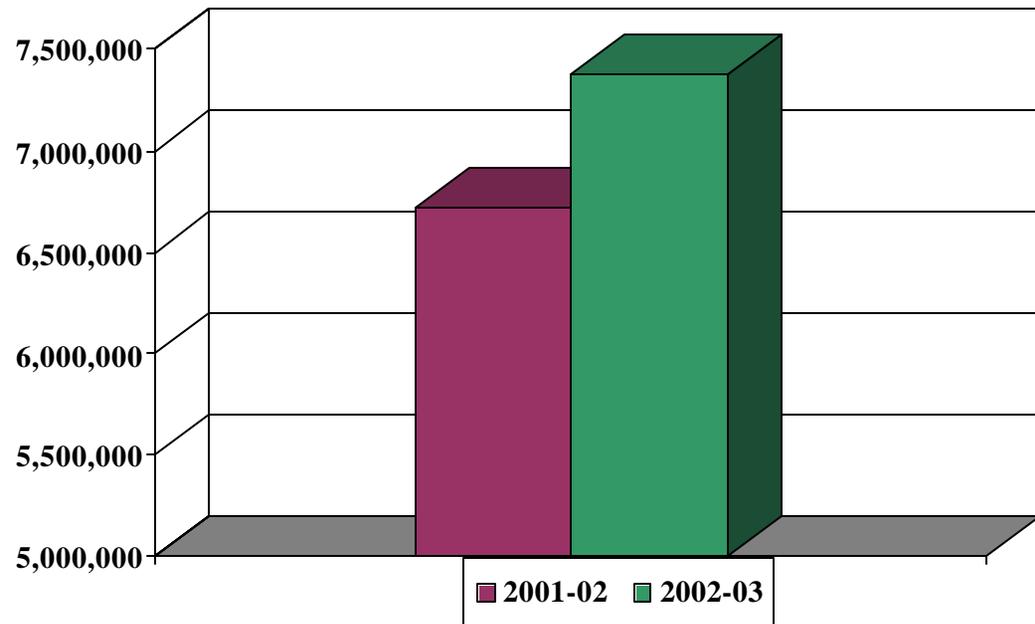


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## Application Volume 2001-02 and 2002-03

- **7,312,585**  
2001-02 FAFSAs  
processed as of  
July 15, 2001  
(week 28)
- **8,031,016**  
2002-03 FAFSAs  
processed as of  
July 14, 2002  
(week 28)



**That's a 9.8% increase!**

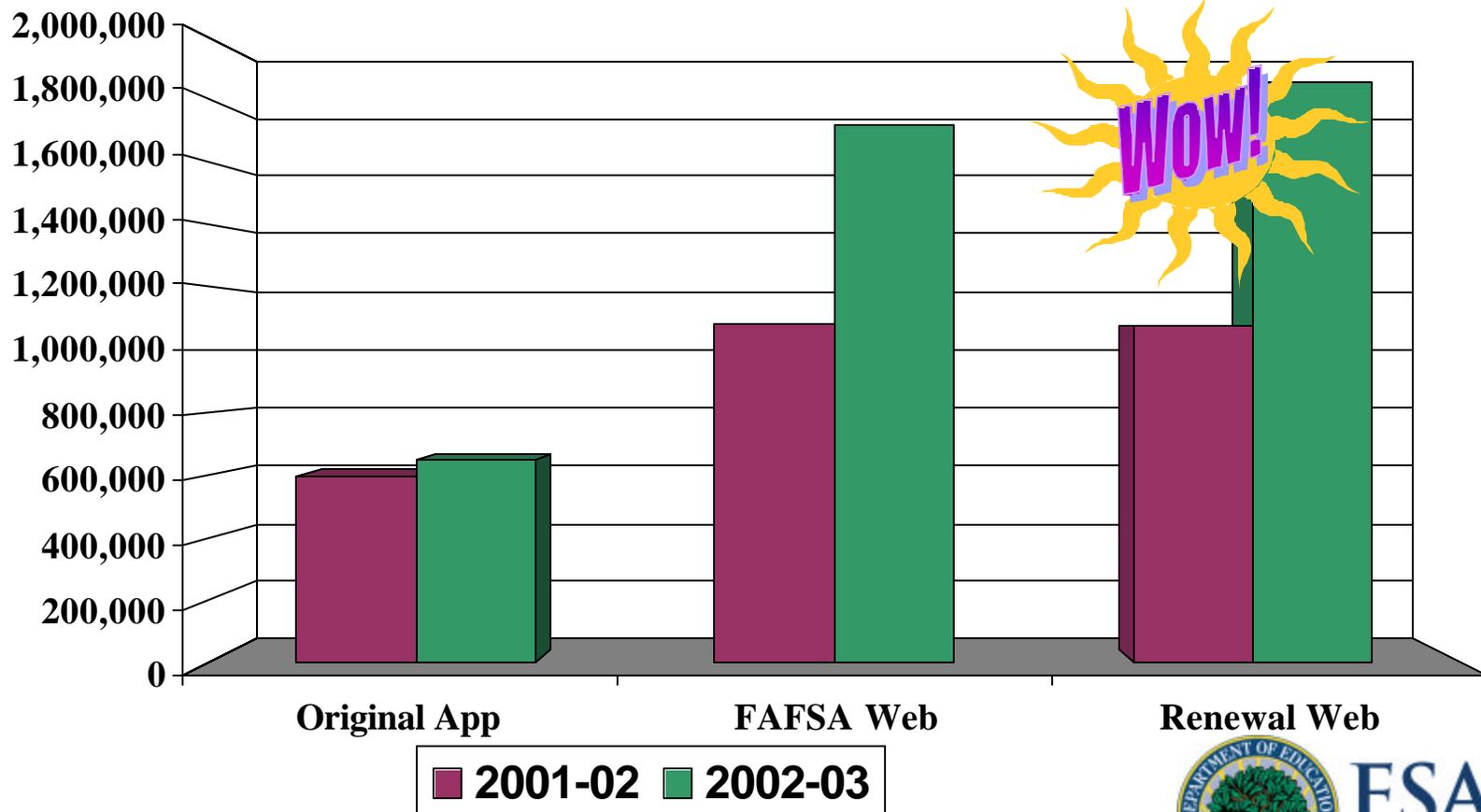


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# Electronic Applications 2001-02 and 2002-03

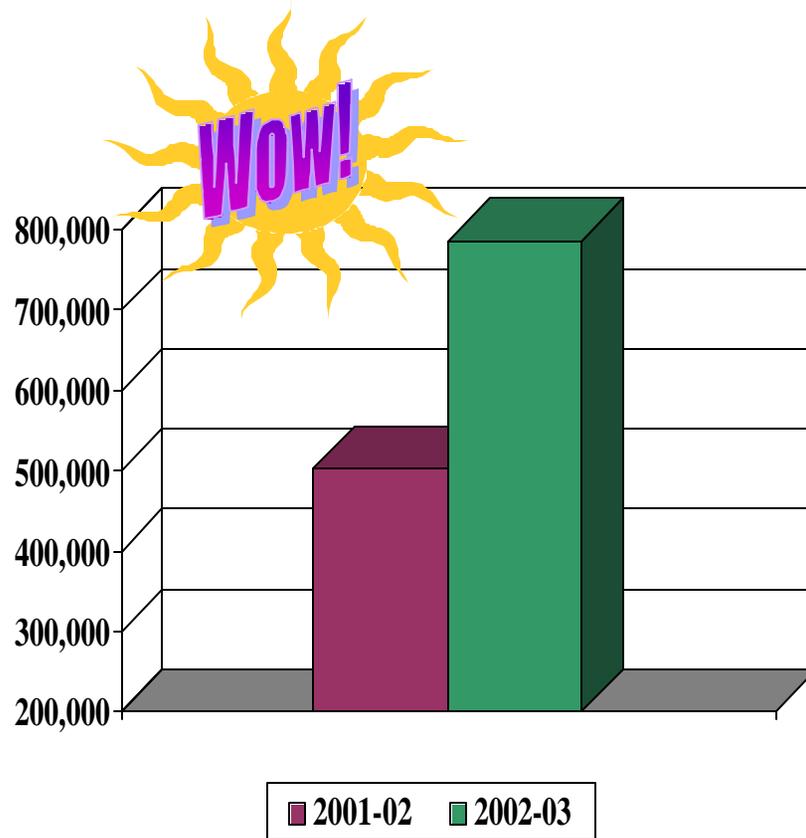
For the first 28 weeks of processing for  
2001-02 and 2002-03



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## Moving to a “Paperless Process” PINs and Electronic Signatures



- Since Nov. 1998, 21 million+ individuals have received PINs
- In 2001-02, over 500,000 students and parents signed their FAFSA electronically
- So far for 2002-03, already over 840,000 have signed with PIN



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## ***Moving to a “Paperless Process” E-mail Messages with Links to PIN and SAR***

- Over 3.3 million students provided e-mail addresses
- Since Jan. 1, 2002
  - Over 3 million PIN e-mails sent
  - Over 4 million SAR e-mails sent

**From:** "U.S. Department of Education - CPS" <cpspin@cpsemail.sfa.ed.gov> | [Block Addr](#)  
**Subject:** Your U.S. Department of Education PIN Request  
**To:** "Applicant WAZRDVM7M9F" · ..... · .....

Dear EMILY,

Your U.S. Department of Education PIN has been issued. We are sending this to you as a result of the request you made from the PIN Registration web site.



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# Important Dates



- Federal School Code file updates due July 15<sup>th</sup>
- Draft ISIR Layout available on IFAP and FSA Download



- Renewal Application Process Announcement on IFAP; Guide available on FSADownload



- Action Letter explaining application processing system changes on IFAP
- EDEXpress Action Letter on IFAP



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# Important Dates



- Guide to ISIRs on IFAP
- Web/PIN Action Letter on IFAP
- Revised ISIR Layout in 2003-04 Technical Reference
- Federal School Code List mailed
  
- **Jan 1:** FAFSA on the Web, Renewal FAFSA on the Web, Corrections on the Web available
- **Jan 1:** FAA Access available
- **Jan 2:** Application processing system starts up



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# Getting Ready for the 2003-04 Award Year



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## ***FAFSA on the Web Toolkits***

- Will be mailed early to mid-October to --
  - postsecondary schools
  - high schools
  - state agencies
  - libraries
  - PTAs
  - TRIO Centers
- Toolkits include materials you can use to encourage students to use the Web to apply for aid

*Applying for financial aid  
has never been easier!*

WWW.FAFSA.ED.GOV

**Easy as...**

**123**



*Complete your Free  
Application for Federal  
Student Aid (FAFSA) online*



## ***FAFSA on the Web Toolkits***

- For faster and more accurate processing, encourage students to—
  - Go to Section 1 on Home Page to see what documents they will need to complete FOTW
  - Use new and improved Pre-Application Worksheet instead of paper FAFSA to prepare for filling out FOTW
  - Provide e-mail address
  - Use PIN to electronically sign Web applications



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# Applying for Aid is **FREE!**

- Also use Toolkit to remind students that the first “F” in FAFSA stands for 
- Plenty of help available –
  - Federal Student Aid Information Center
  - Online Chat and other Help features within FOTW
  - Financial Aid Office
- Caution students about “dot com” Web sites with URLs similar to [www.fafsa.ed.gov](http://www.fafsa.ed.gov) that charge families to complete FAFSA!



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# The PIN

- Toolkits encourage students and parents without PINs to apply for one **NOW!**
- [www.pin.ed.gov](http://www.pin.ed.gov)



*Easier to use and navigate  
than ever before!*



WELCOME TO  
**PIN REGISTRATION**

[PIN HOME](#)

[PIN REQUEST AND INFORMATION](#)

[CHANGE INTERNET ACCESS](#)

[CONTACT US](#)

[SECURITY](#)

[US DEPARTMENT OF EDUCATION](#)

[FINANCIAL AID FOR STUDENTS](#)

[STUDENT GUIDE](#)

[FSA ELECTRONIC SERVICES](#)

This web site is your source of information for the U.S. Department of Education PIN. Select one of these links for more information about [what the PIN is](#) and [where you can use it](#) or select the [PIN Frequently Asked Questions](#) link.

If you have never received a U.S. Department of Education PIN or you are unsure if you already have a PIN, please select [Apply for PIN](#) to receive one. By accepting this PIN you agree to not disclose or share your PIN with anyone. Because your PIN serves as your electronic signature and provides access to your personal records, you should never give your PIN to anyone. Be sure to keep your PIN in a safe place; you will be able to use the same PIN in the future to apply electronically for student aid and access your U.S. Department of Education records.

If you have received a PIN previously but no longer have access to it, select [PIN Request and Information](#) from the menu list on the left side of this page.

[APPLY FOR PIN](#) [CHANGE PIN](#) [PIN FAQ'S](#)





## *Ordering Paper FAFSAs*

- Watch for an announcement on IFAP later this Fall about placing orders for 2003-04 FAFSAs
- Due to continuing increase in electronic filing, consider reducing orders of paper FAFSAs



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# ***FAFSA on the Web***

PowerPoint  
presentation of FAFSA  
on the Web screen  
shots available on  
IFAP in early October  
for use at Financial Aid  
Nights



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# Web Demo Site

FOTW Demonstration Site will be available on 11/25/02

- <http://fafsademmo.test.ed.gov>
- User name: **eddemo**
- Password: **fafsatest**

**CPS Web Applications**  
Demos System

Welcome to the Department of Education's CPS Web Applications Demo System

This Web site is brought to you as part of the U.S. Department of Education's efforts to make its processing systems available in the format of a demonstration environment. This will allow users to become familiar with the CPS Web Applications products available to federal financial aid applicants. This site offers all the functionality features of the production site.

However, 2001-2002 applications are not available on this Demo system. The submitted applications are not processed and the data is deleted daily from the demo server. Processors that depend on statistical data such as renewal applications, correction applications, SAPF application records, application status check-out, electronic signature submits have been assigned an assessment of preloaded test data. These student IDs and PINs are given below.

Printed signature pages include a test sample watermark and areas if **NOT** be mailed to the processor. The demo signature page is **NOT** accepted or processed. Also, an estimated EFC is **NOT** calculated after an application is submitted. The EFC values are always 99999 for any test case on this test demo site.

**Preloaded Test Data**

2001 - 2002 Renewal FAFSA on the Web

Test Case	SSN	Name ID	DOB	PIN	Dependency Model
1	393-04-0001	DA	08/21/1980	1681	Dependent
2	293-04-0011	MC	08/21/1980	1271	Dependent
3	209-10-4101	FI	05/05/1980	1188	Dependent
4	493-04-0008	SM	07/22/1977	1818	Independent
5	265-60-1501	FA	08/25/1977	1934	Independent
6	293-04-0039	SM	08/21/1985	8820	Independent

2000 - 2001 FAFSA Corrections on the Web,  
Duplicate SAPS Request, Status Check and Electronic Signatures

Test Case	SSN	Name ID	DOB	Transaction Number	PIN	Dependency Model
1	555-11-4004	SM	02/15/1990	01	1337	Dependent
2	400-30-4204	ED	01/01/1981	01	1941	Dependent
3	400-30-4414	AD	08/21/1982	01	2319	Dependent
4	555-01-0014	ED	02/15/1990	01	1091	Independent
5	445-01-0060	BO	08/01/1971	01	2312	Independent
6	265-60-1501	FA	08/25/1979	01	1711	Independent

[Continue](#)



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# Renewal Application Process



- Announcement and Guide available on IFAP and FSADownload
- Network message asking FAAs to remind students to update permanent mailing address and e-mail address with CPS
- **10/7 – 10/31** Schools can request that PINs be sent to students instead of paper Renewal FAFSAs, to remind them to reapply
- **11/7 – 12/20** CPS mails Renewal FAFSAs to students



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# Renewal Application Process

- **11/7 – 12/20** PINs sent reminding students to reapply if --
  - Used Web in 2002-03
  - Indicated on 2002-03 FAFSA that they were a graduate or 5<sup>th</sup> year undergraduate student
  - School requested PIN be sent instead of paper Renewal FAFSA

<b><i>Renewal Reminders</i></b>	
Provided e-mail address on 02-03 FAFSA	Did NOT provide e-mail address
<b>PIN e-mail</b>	<b>PIN mailer</b>



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# ***The 2003-04 Application Process***

***Simplifying, “Electrifying,” and Streamlining  
the Process for Students and Schools***



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# *Student Applications*

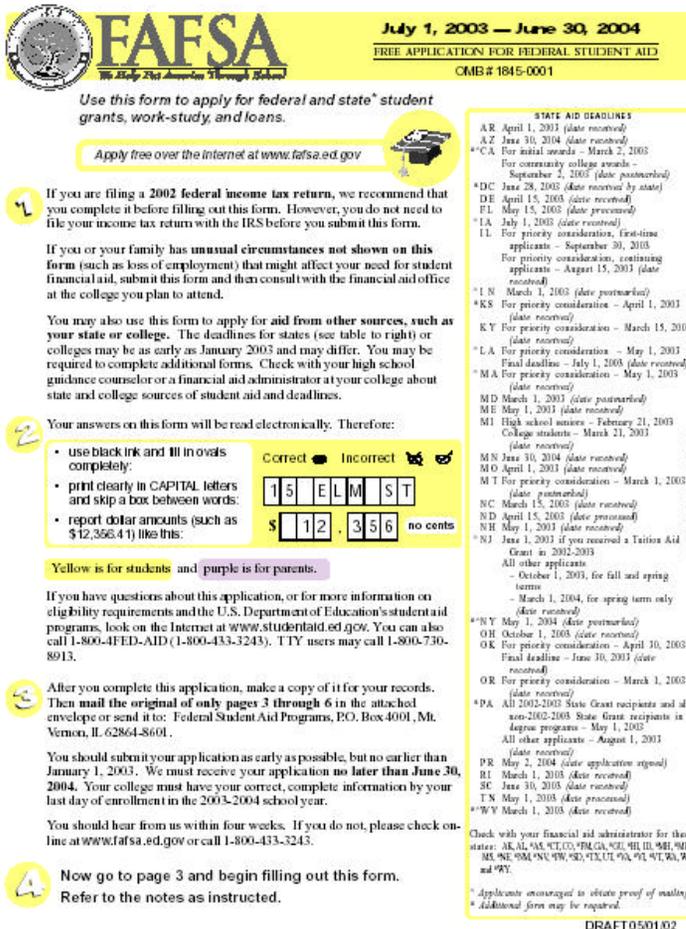


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# The Paper FAFSA

DRAFT 05/01/02



**FAFSA**  
We Help Put America Through School

July 1, 2003 — June 30, 2004  
FREE APPLICATION FOR FEDERAL STUDENT AID  
OMB # 1845-0001

Use this form to apply for federal and state\* student grants, work-study, and loans.

Apply free over the internet at [www.fafsa.ed.gov](http://www.fafsa.ed.gov)

**1** If you are filing a 2002 federal income tax return, we recommend that you complete it before filling out this form. However, you do not need to file your income tax return with the IRS before you submit this form.

If you or your family has unusual circumstances not shown on this form (such as loss of employment) that might affect your need for student financial aid, submit this form and then consult with the financial aid office at the college you plan to attend.

You may also use this form to apply for aid from other sources, such as your state or college. The deadlines for states (see table to right) or colleges may be as early as January 2003 and may differ. You may be required to complete additional forms. Check with your high school guidance counselor or a financial aid administrator at your college about state and college sources of student aid and deadlines.

**2** Your answers on this form will be read electronically. Therefore:

- use black ink and fill in ovals completely.
- print clearly in CAPITAL letters and skip a box between words:
- report dollar amounts (such as \$12,356.41) like this:

Correct  Incorrect

1 5 E L M S T  
\$ 1 2 . 3 5 6 no cents

Yellow is for students and purple is for parents.

If you have questions about this application, or for more information on eligibility requirements and the U.S. Department of Education's student aid programs, look on the Internet at [www.studentaid.ed.gov](http://www.studentaid.ed.gov). You can also call 1-800-4FED-AID (1-800-433-3243). TTY users may call 1-800-730-8913.

**3** After you complete this application, make a copy of it for your records. Then mail the original of only pages 3 through 6 in the attached envelope or send it to: Federal Student Aid Programs, P.O. Box 4001, Mt. Vernon, IL 62864-8601.

You should submit your application as early as possible, but no earlier than January 1, 2003. We must receive your application no later than June 30, 2004. Your college must have your correct, complete information by your last day of enrollment in the 2003-2004 school year.

You should hear from us within four weeks. If you do not, please check online at [www.fafsa.ed.gov](http://www.fafsa.ed.gov) or call 1-800-433-3243.

**4** Now go to page 3 and begin filling out this form. Refer to the notes as instructed.

**STATE AID DEADLINES**

AR April 1, 2003 (date received)  
AZ June 30, 2004 (date received)  
CA For initial awards - March 2, 2003  
For community college awards - September 2, 2003 (date postmarked)  
DC June 28, 2003 (date received by state)  
DE April 15, 2003 (date received)  
FL May 15, 2003 (date processed)  
IA July 1, 2003 (date received)  
IL For priority consideration, first-time applicants - September 30, 2003  
For priority consideration, continuing applicants - August 15, 2003 (date received)  
IN March 1, 2003 (date postmarked)  
KS For priority consideration - April 1, 2003 (date received)  
KY For priority consideration - March 15, 2003 (date received)  
LA For priority consideration - May 1, 2003  
Final deadline - July 1, 2003 (date received)  
MA For priority consideration - May 1, 2003 (date received)  
MD March 1, 2003 (date postmarked)  
ME May 1, 2003 (date received)  
MI High school seniors - February 21, 2003  
College students - March 21, 2003 (date received)  
MN June 30, 2004 (date received)  
MO April 1, 2003 (date received)  
MT For priority consideration - March 1, 2003 (date postmarked)  
NC March 15, 2003 (date received)  
ND April 15, 2003 (date processed)  
NH May 1, 2003 (date received)  
NJ June 1, 2003 if you received a Tuition Aid Grant in 2002-2003  
All other applicants - October 1, 2003, for fall and spring terms  
- March 1, 2004, for spring term only (date received)  
NY May 1, 2004 (date postmarked)  
OH October 1, 2003 (date received)  
OK For priority consideration - April 30, 2003  
Final deadline - June 30, 2003 (date received)  
OR For priority consideration - March 1, 2003 (date received)  
PA All 2002-2003 State Grant recipients and all non-2002-2003 State Grant recipients in laptop programs - May 1, 2003  
All other applicants - August 1, 2003 (date received)  
PR May 2, 2004 (date application signed)  
RI March 1, 2003 (date received)  
SC June 30, 2003 (date received)  
TN May 1, 2003 (date processed)  
WV March 1, 2003 (date received)

Check with your financial aid administrator for these states: AK, AI, AS, CT, CO, FM, GA, GU, HI, IL, IN, MI, MO, MS, NE, NM, NV, OH, SD, TX, UT, VA, WI, WY, WA, WI, and WY.

\* Applicants encouraged to obtain proof of mailing.  
\* Additional form may be required.

DRAFT 05/01/02

- Color of the FAFSA
  - Yellow for Students (Pantone 100 CVU Yellow)
  - Purple for Parents (Pantone 263 CVU Purple)

- FAFSA will include insert and return receipt postcard
- Some new and reworded questions and instructions



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# The Paper FAFSA

- New logo to complement FSA logo:



- Improved notes for --
  - Questions 38 and 73: Answer “yes” if 1040 filed only to claim Hope or Lifetime Learning credits
  - Questions 47-49 and 82-84: If eligible for Simplified Needs Test, can skip asset questions
- No change to Drug Question (Question 35)





## *The Paper FAFSA*

- VA monthly benefits amount increased to 4 characters
- Added parents' marital status date question (Question 60)

60. Month and year they were married, separated, divorced, or widowed

MONTH		YEAR				
<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Changed layout of questions 59 – 70 to accommodate new Question 60



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## *The Paper FAFSA E-mail Address*

- New e-mail address field added to Step 6 allows FSA and schools to communicate electronically with students about application and results
- Student receives e-mail with links to PIN and SAR data on the Web as quickly as 24 hours after processing



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# *The Paper FAFSA Worksheet C*

- Clarification added to Worksheet C questions:
  - Expanded “child support paid” question to include support paid as a result of a legal requirement
  - Included more examples of “taxable earnings from need-based employment”
  - Reworded “student grant and scholarship aid reported to the IRS” question to clarify what part of Americorps awards should be reported





## *The Paper Renewal FAFSA*

- Includes same changes made to paper FAFSA, including new e-mail address field
- Barcode with student's Name ID added to bottom of each page of application



1 2 3 4 5 6 7 8 9 RO



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## *The Paper Renewal FAFSA*

- Will check NSLDS to determine school code(s) to be printed in Step Six
  - Only school codes for institutions that reported disbursements in 2002-03 will be printed
  - If no disbursement data exists, will print all schools listed on 2002-03 record used to create Renewal FAFSA
- Will pre-print answers to income questions for students who were eligible for Auto Zero EFC in 2002-03



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# FAFSA on the Web

## www.fafsa.ed.gov

**FAFSA**  
FREE APPLICATION FOR FEDERAL STUDENT AID  
*We Help Put America Through School*

Deadlines Pin Site Help Contact Us FAQs Site Map

**Discover Your Opportunities!**  
FAFSA opens the door to the federal aid process. Every step you can take gets you closer to achieving your education goals. Find out what you can expect from beginning to end. [More>>](#)

**Welcome to FAFSA on the Web, U.S. Department of Education**

**FAFSA ALERTS:**  
**Deadlines:** Submit 2002-2003 FAFSA on the Web Applications by **midnight Central Daylight time**, June 30, 2003. [More>>](#)

**Scheduled Maintenance:** FAFSA on the Web will be unavailable on every Sunday from 5 a.m. to 11 a.m. (Eastern Standard Time). We apologize for any inconvenience this may cause. [More>>](#)

**Get Your PIN**  
To apply for your PIN online, go to the Department of Education's [PIN Site](#). [More>>](#)

Before Beginning a FAFSA	Filling Out a FAFSA	FAFSA Follow-up
<p><b>Get organized!</b> To simplify filling out the application, gather the required documents and other information.</p> <ul style="list-style-type: none"> <li>▶ Determine my eligibility</li> <li>▶ Gather documents and information</li> <li>▶ Check deadlines</li> <li>▶ Register for a PIN</li> <li>▶ Find my school codes</li> <li>▶ Interactive Worksheets</li> <li>▶ More Options &gt;&gt;&gt;</li> </ul>	<p><b>Fill out the application!</b> FAFSA has seven steps that ask about you, your school plans, financial information and more.</p> <ul style="list-style-type: none"> <li>▶ Fill out a FAFSA</li> <li>▶ Llenar una FAFSA en Español</li> <li>▶ Fill out a Renewal FAFSA</li> <li>▶ Continue working on saved FAFSA</li> <li>▶ Provide Electronic Signature</li> <li>▶ More Options &gt;&gt;&gt;</li> </ul>	<p><b>Find your FAFSA online!</b> You can go back to your FAFSA to check status, make corrections to a processed FAFSA, and get other information.</p> <ul style="list-style-type: none"> <li>▶ Check status of a submitted FAFSA</li> <li>▶ Print Student Aid Report (SAR)</li> <li>▶ Make Corrections to a Processed FAFSA</li> <li>▶ Student Access</li> <li>▶ More Options &gt;&gt;&gt;</li> </ul>

FSA ELECTRONIC SERVICES    PRIVACY & SECURITY    STUDENT GUIDE

- Site improved throughout to make application process faster and easier to understand
- New logo
- Dynamic “Late-breaking news” section added
- “Fill Out a FAFSA” button more prominent



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## ***FAFSA on the Web***

- Fields pre-populated based on applicant's answers to other questions –
  - 'Number in College' set to '1' if independent and 'Household Size' is '1'
  - 'Were you born before 1/1/80?' pre-populated based on answer to 'Date of Birth' question
  - 'Are you married?' pre-populated based on answer to 'Marital Status' question
- More use of skip logic



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## ***FAFSA on the Web and Renewal FOTW***

- Added barcode consisting of student's Name ID to signature page to improve accuracy and reduce processing time



- Added more instructions at end of application to ensure students successfully transmit



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## *Simplified FOTW*

- Will implement a 'Simplified' FOTW --
  - Law provides that a family that meets criteria for Automatic Zero EFC or Simplified Needs Test (SNT) can complete a 'simplified' FAFSA

*"The simplified application form shall... permit such family to provide only the data elements required for the purposes of establishing eligibility for student financial aid"*

- Web technology offers advantage of helping students determine if they qualify



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## *Simplified Application*

- Implemented January 1, 2003
- Applies to FOTW, RFOTW, and COTW
- Questions reordered to determine if applicant qualifies for Auto Zero EFC or SNT
- New Pre-Application Worksheet can be printed from FOTW; will follow questions as presented and reference paper FAFSA question numbers
- Students from certain states will not be able to skip questions because data is required for state programs



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# *Simplified Application*

- Applicants notified that school or health professions programs may need answers to all FAFSA questions
- If student qualifies for Auto Zero EFC, student (and parents) has option to skip --
  - Income taxes paid and number of exemptions claimed
  - Worksheets A, B, C questions
  - Asset net worth questions
- If student qualifies for SNT only, student (and parents) has option to skip asset net worth questions
- If student does not qualify for Auto Zero EFC or SNT, student completes all remaining FAFSA questions
- COTW will detect if eligibility changes and prompt students to provide additional information



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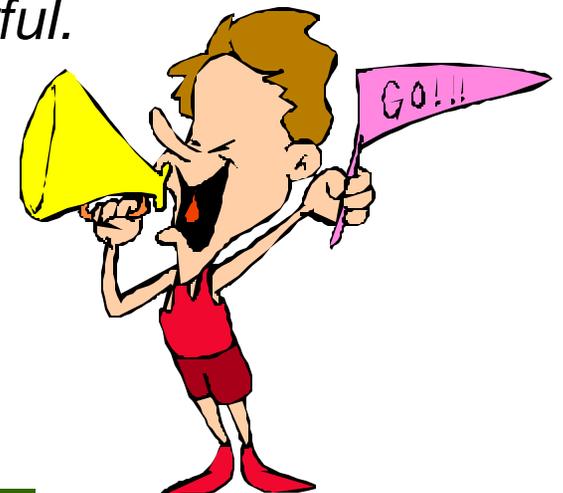
# ***FAFSA on the Web*** ***www.fafsa.ed.gov***

☀ *I completed the FAFSA on-line approximately 25 hours ago and I just received an e-mail that it has been processed, with a link to view my processed data. I am truly impressed with the quick turn-around time.*

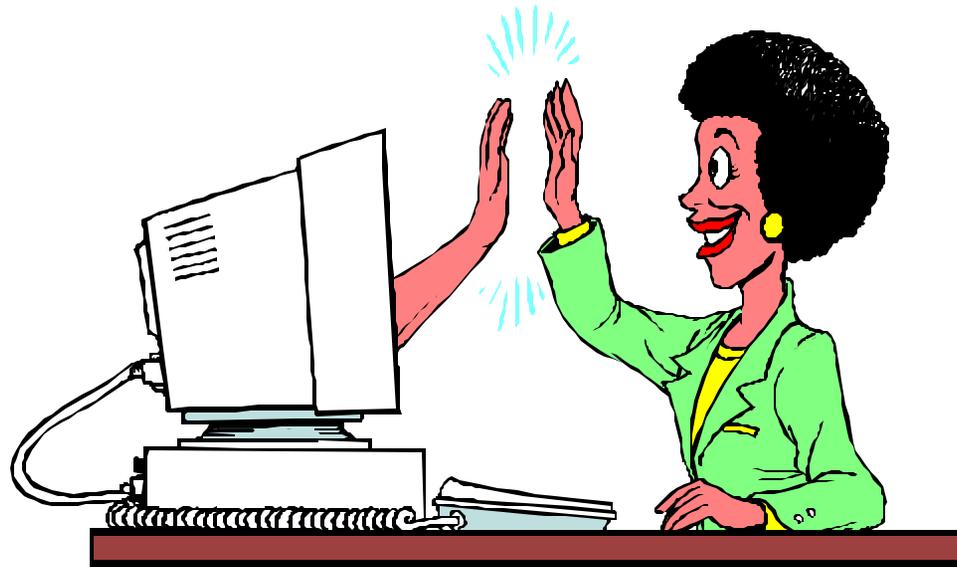
☀ *This is a wonderful new site, I actually enjoyed going through the questions, they were so easy to read and complete.*

☀ *The way the application is laid out is wonderful. You almost can't make a mistake.*

☀ *This is the best thing since sliced bread!*



# ***FAA Applications***





# FAA Access to CPS Online

- Newest Web application product for FAAs
- Implemented May 1, 2001
  - Check status of batches
  - View students' SAR information
- On April 9, 2002, enhanced to allow FAAs to –
  - Enter and submit FAFSA and Renewal FAFSA data
  - Correct application data



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## **FAA Access to CPS Online Enhancements**

- Renamed product to make its purpose clearer
- Reformatted and simplified application screens
  - Less on-screen help text
  - More use of scrolling to limit number of application pages
  - Dependency Override field added after last dependency question



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## FAA Access to CPS Online Enhancements

- Signature Hold File –
  - To receive automatically, must sign up
  - Option to receive file –
    - Continuously, or
    - One-time only
- Due to extremely low usage, removed duplicate Renewal FAFSA print feature



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# *FAA Access to CPS Online and EDEExpress*

- Schools will have ability to link to FAA Access --
  - From within the view menu of EDEExpress while in a student record
  - EDEExpress will launch the PCs default browser and bring up the FAA Access home page



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## ***EDExpress*** ***Enhancements***

### ■ Apps

- Schools will be able to open a student record using either the Original SSN or Current SSN

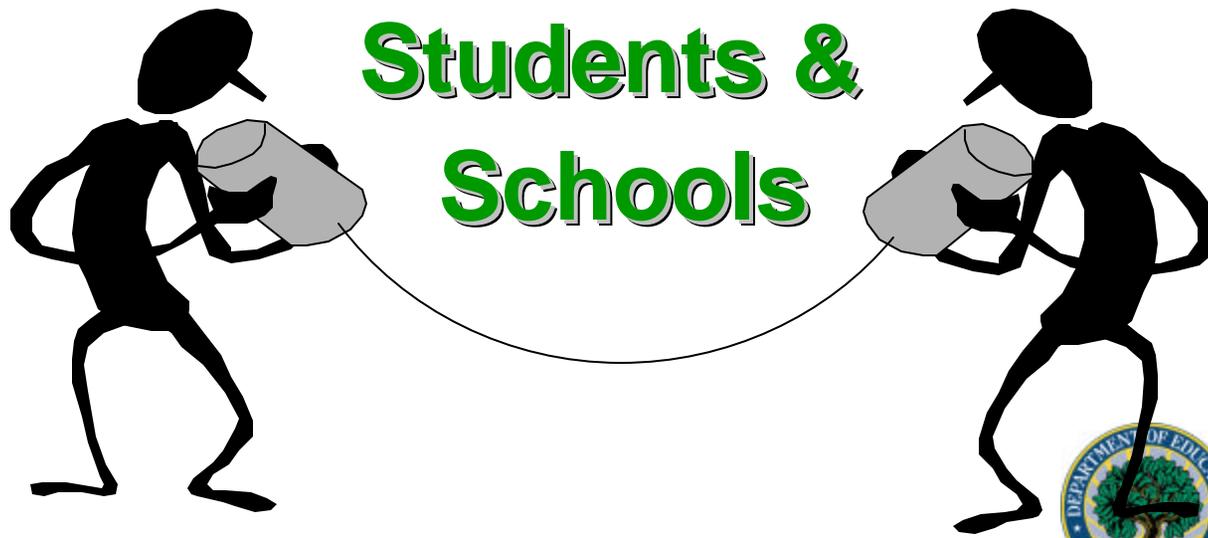
### ■ Global

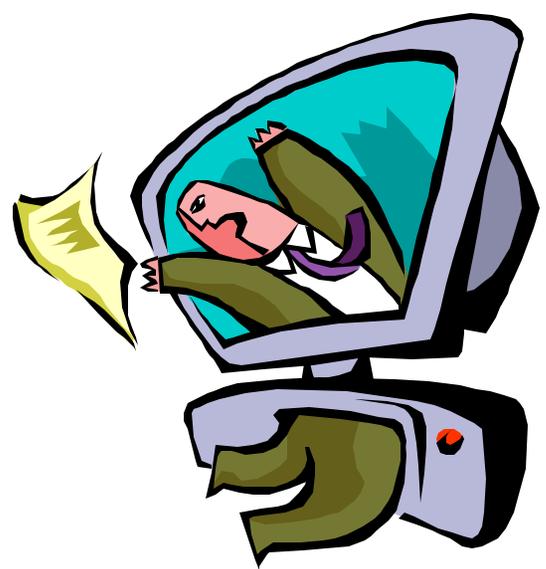
- Schools will be able to --
  - Send documents through e-mail to students
    - Document tracking letters
    - Award letters
    - Other student letters
    - *New Student Summary Report*
- Float in student's first or full name after the "Dear" in greetings of student letters



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# *Application Results: Receiving and Reviewing Applicant Data*





# *Student Output*



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## **Response to Submitted FAFSA No E-mail Address Provided**

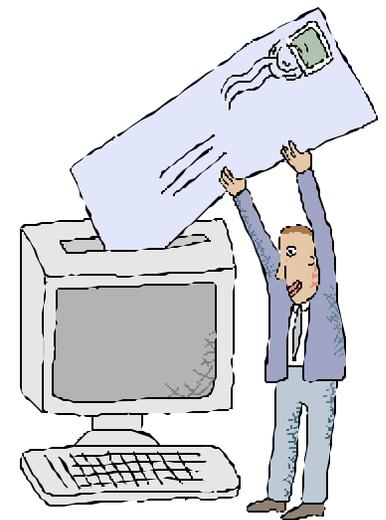
<b>2003-04</b>	<b>Paper Filers</b>	<b>Web, EDExpress Filers</b>
<b>Type of Acknowledgement Received</b>	<ol style="list-style-type: none"> <li>1. Postcard</li> <li>2. PIN Mailer</li> <li>3. Paper SAR</li> </ol>	<ol style="list-style-type: none"> <li>1. PIN Mailer</li> <li>2. Paper SAR Acknowledgement</li> </ol>





## ***Response to Submitted FAFSA Paper FAFSA, E-Mail Address Provided***

- Students who file paper FAFSA and provide e-mail address will receive e-mails –
  - With link to PIN
  - With link to SAR
- If missing signatures, application immediately rejected and full paper SAR sent to student for signatures





## ***Response to Submitted FAFSA Web Filer, E-Mail Address Provided***

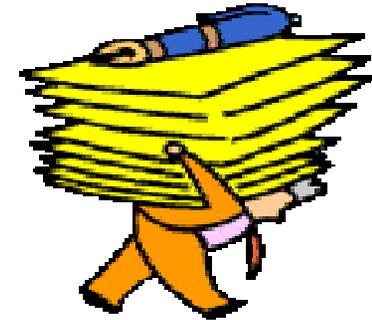
- Students who apply on the Web and provide e-mail address will receive e-mails –
  - With link to PIN
  - With link to SAR
- Web filers with missing signature(s) will receive --
  - E-mail with link to FOTW where student can print signature page or sign electronically
  - Full rejected paper SAR if all required signatures not provided within 14 days



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# Paper Student Aid Report (SAR)



- 2003-04 SAR will be **YELLOW**
- SAR will follow the order of questions on paper FAFSA
- E-mail address is numbered and can be corrected on paper SAR
- Student ID barcode added to correction pages
- DRN moved to bottom left hand corner of SAR to eliminate confusion with EFC
- Statement added to page 2 that student must notify FAA if drug conviction status changes





# SAR on the Web

- In addition to accessing SAR data via an e-mail message, students with PINs can view their SAR data on the Web by going to Student Access on the Web →
- This applies to paper, Web, and EDEXpress filers

**FAFSA Follow-up**

**Find your FAFSA online!**  
You can go back to your FAFSA to check status, view a Student Aid Report and get other information.

- ▶ Check status of a submitted FAFSA
- ▶ Print Student Aid Report (SAR)
- ▶ Student Access
- ▶ More Options >>>





# SAR on the Web

- Will display full SAR comment text
- HTML and PDF printouts will be the same and will include all fields on paper SAR, including EFC
- Students can click on new 'Make Correction' button included in SAR comment text and go directly to Corrections on the Web

**STUDENT on the Web ACCESS**

Help Contact Us

- Transactions
- Computed Information**
- You the Student
- Income/Assets
- Parent Information
- School Information
- NSLDS
- SAR Comments
- Print Summary

Computed Information	
Transaction Number:	03
DRN:	5699
Date Application Completed:	02/23/2002
Application Receipt Date:	02/23/2002
Processed Date:	06/07/2002
Signed By:	STUDENT
EFC:	01010

- Will refer students to NSLDS website for most current financial aid history information



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# ***FAA Output***



## ***FAA Access to CPS Online Student Inquiry Enhancements***

- FAAs can view applicant data on the Web
- Improved Student Inquiry features --
  - Student's full name, name ID, and academic year displayed on all pages
  - All FAA information will be included on SARs printed from FAA Access
  - Will use text instead of codes for application flags in the FAA Information section

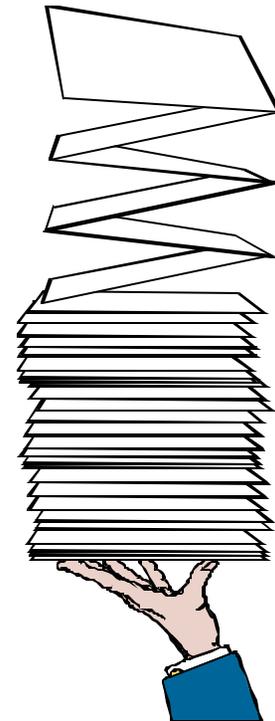


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# *Institutional Student Information Report (ISIR)*

- ISIR record layout will follow order of paper FAFSA questions, with exception of 'Parent Marital Status Date'
- New values in FAFSA 'record type' for paper Spanish FAFSAs (value 55)
- Will add 'field verify' flags for 3<sup>rd</sup> Party Servicers
  - When values questioned by CPS value were "verified," (same value was re-entered on a correction) or when value was corrected to a different value



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# ISIR

## Financial Aid History Information

### ■ Discharge Flag –

#### ➤ Additional values added:

- D= Death
- R= Reaffirmed
- C= Conditional
- P= Permanent
- M= Multiple
- N= None



#### ➤ SAR 'C' Code will be set for all values **except** "N" and will use one generic comment for all conditions (comment 115)

### ■ Added Direct Loan PLUS MPN Flag, with same values as MPN Flag for student borrowers

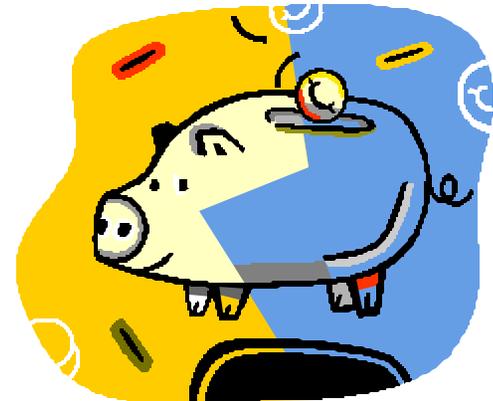




# ***ISIR***

## ***Financial Aid History Information***

- Changed title of second section of NSLDS History to 'Defaulted/Discharged Loan Detail Information'
- Pell Grant Data –
  - NSLDS will provide CPS with Pell 'Attended' instead of 'Reporting' school code
  - Deleted 'Remaining Amount to be Paid' field



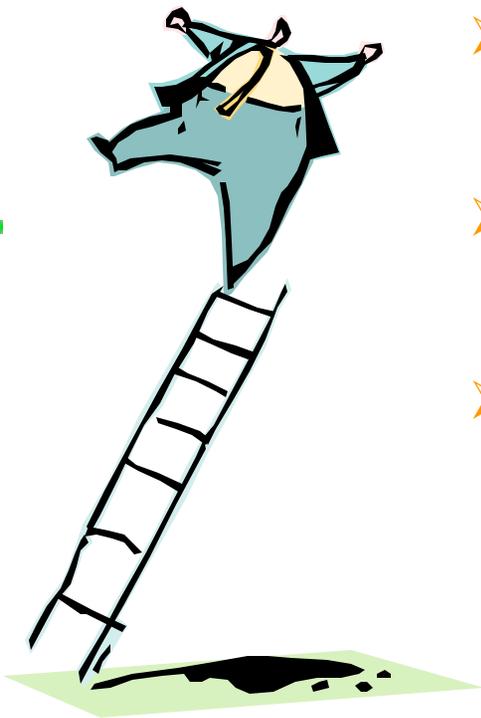


# ISIR

## *Financial Aid History Information*

### ■ Loan limit edits –

- Deleted separate edit when student exceeds loan limits
- Modified remaining edit to include both approaching and exceeding limits
- Added new comment for postscreening reason codes 09 (exceeded subsidized limit) and 10 (exceeded combined limit)





# **ISIR**

## **NSLDS Postscreening Match**

- Will be implemented Jan. 13, 2003
- Postscreening will be weekly
- Postscreening reason codes –
  - Added capability to report up to 3 codes
  - Added new values:
    - 11 = No longer exceeds subsidized loan limit
    - 12 = No longer exceeds combined loan limit
    - 13 = Change in discharge status



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# ***SAR and ISIR New Rejects***



- In anticipation of IRS match, for dependent students we will --
  - Reject if both parent SSN fields are left blank or do not fall within valid SSN range
    - Reject is non-verifiable
    - To avoid or eliminate reject parent SSN must be provided
    - If parent is non-citizen, and does not have an SSN, must enter 000-00-0000
  - Require one parent SSN and last name on Web applications



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# ***SAR and ISIR New Rejects***

- Modifying current reject that applies when taxes paid amount equals AGI –
  - Non-verifiable
  - Expanded to include students and parents whose taxes paid amounts are GREATER than AGI
- Modifying current warning edit for 'taxes paid is greater than 35% of AGI' –
  - Verifiable
  - Taxes paid percentage increased to 40%



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## ***SAR and ISIR New Rejects***

- New verifiable reject for students whose 'Date of Birth' does not match SSA
- Will modify current reject A (applicants who are 75 years or older) and reject B (applicants who are 17 years old or younger) –
  - Will not reject if reported DOB matches SSA's records, and SSN match flag is '4'
- Will process, but reject, records for students who signed paper FAFSA prior to 1/1/03



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## Database Matches

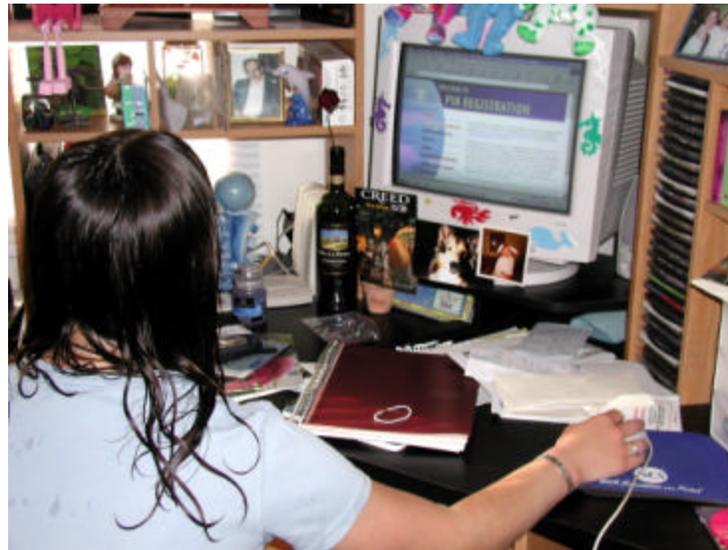
- Will not implement Prisoner's Match in 2003-04
- INS Match:
  - Will hold records for up to 3 compute cycles pending results of automated secondary confirmation before sending ISIR
  - Procedure will affect 'Processing Date'





# ***Correcting Application Information***

## ***Student Corrections & School Corrections***



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## *Making Corrections*

- Students can still use paper SAR to correct application



- Better yet, students can use Web to correct application data

- Will prompt students to carefully review and update e-mail address

Strengthened pop-up message that appears when student tries to correct transaction that resulted from a school's correction



# *Student Web Corrections*

## ► Make Corrections to a Processed FAFSA

- Corrections on the Web processed 'real time' –
  - CPS edits will be applied immediately
  - 'Official' EFC will be provided instantaneously
  - No match will occur with NSLDS, but postscreening match will be conducted no more than one week later
  - ISIR will go out in daily batch transmission



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## **FAA Access to CPS Online Web Corrections**

- FAA Access to the CPS Online corrections will be 'real time'
- Correction screens reformatted for easier use
- Codes will appear next to fields so FAAs can tell which were changed
  - An '#' indicates field corrected on current transaction
  - An '@' indicates field corrected on earlier transaction



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# *Other Changes and Noteworthy*



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## *IRS Match*

- Proposed legislation has been sent to Hill for consideration during this session of Congress

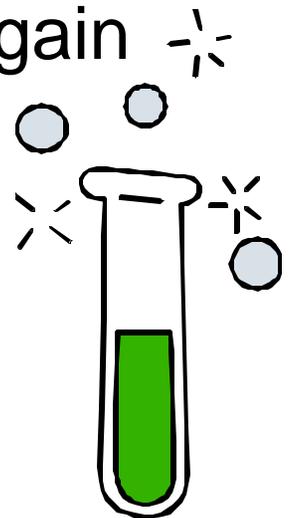


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## Other News

- Retiring FAFSA Express
- Further improvements to verification selection criteria
- Mainframe Test System available once again
  - Available mid-November
  - Allows testing of application and correction data
  - Participants must have TG number, but not required to have federal school code



**FSA**  
FEDERAL  
STUDENT AID

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## ***EDExpress—Pell/Direct Loan***

- EDExpress schools will be full-participants in the Common Origination and Disbursement process for 2003-04
- Combo schools using EDExpress to create and transmit data to FSA in conjunction with another system
  - Will still use the same flat files for External Add Import and Export and External Change



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## ***E**DE**Express***



### ■ Important Release Dates:

- December, 2002 – Application Processing
- December, 2002 – Packaging Module
- March, 2003 – COD Modules (Pell/Direct Loan)
- May, 2003 – Quality Analysis Tool
- June, 2003 – Direct Loan Tools



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## *Looking ahead...*



- Working to create ISIR in XML format for the 2004-05 application processing year



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## *Upcoming Conferences*

- 2003-04 Application Processing Update Videoconference in October 2002
- Electronic Access Conferences:



November 4-6  
Orlando, Florida



December 3-6  
Las Vegas, Nevada



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# Questions?

We appreciate your feedback!  
Send your questions and  
suggestions to:

**Email: [fafsaweb@ncs.com](mailto:fafsaweb@ncs.com)**

**Phone: 1-800-433-3243**



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