

# CSAC



CALIFORNIA  
**STUDENT AID**  
COMMISSION

## BETTER FAFSA, BETTER CADAA UPDATE

Student Impact, Outreach, and  
Communications Committee  
September 6, 2023





# 2024-2025 FAFSA Key Changes

# Summary of Key Application Changes

Number of questions dropped from 108 to 46. Questions removed:

- Housing choices
- Selective Service
- Drug Conviction
- Taxable income questions removed from *online* FAFSA

Students can list up to 20 colleges

Online FAFSA available in 11 most common languages spoken in U.S.

Paid preparation no longer permitted

Fewer FAFSAs selected for verification

# Financial Aid Formula Changes

Net value of businesses and farms of any size counted as an asset

- Prior to 2024-25, less than 100 employee businesses and farms not counted

Less aid for families with multiple children in college

- Number of children in college at the same time will no longer affect eligibility for federal need-based aid
  - Small impact on low-income families
  - Big impact on middle-income and high-income families



# More Federal Aid for Single Parents



More financial aid for single parent households. Two types:

- Dependent students with just one parent
- Independent students who are single parents

More student and parent income will be sheltered from the financial aid formula

Greater eligibility for the maximum Federal Pell Grant

- Single Parent: AGI  $\leq$  225% of the poverty guideline
- Not Single Parent:  $\leq$  175% of the poverty guideline



# New Terms

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## CONTRIBUTORS

- Role based completion –student, parent, other parent, student spouse
- All contributors will need a FSA ID
- Parents who are not US Citizens or permanent residents will be able to create an FSA ID



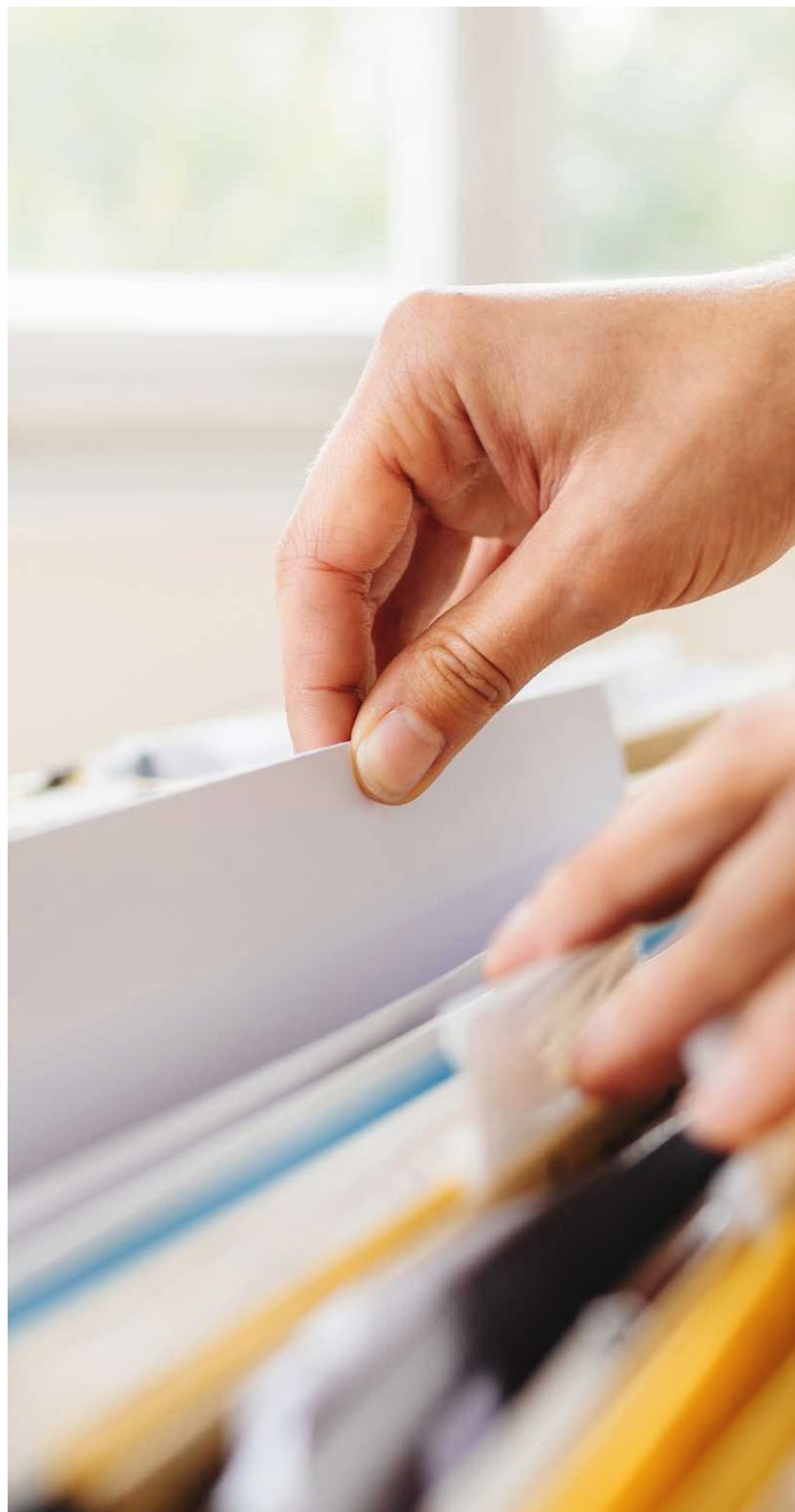
## CONSENT

- All students and contributors must provide consent for federal tax data to be transferred, used and shared.
- If a required contributor refuses to provide their information, it will result in an incomplete FAFSA form, and the student will become ineligible for federal student aid.



## STUDENT AID INDEX

- Expected Family Contribution (EFC) changes to Student Aid Index (SAI). SAI could be as low as -\$1,500
- New Pell Grant determination and formula that will expand eligibility by using the AGI, household type and size and federal poverty guidelines.



## Federal Tax Information (FTI)

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- **Direct Data Exchange to import applicant, parent, parent spouse, and/or student spouse FTI from the IRS.**
- **All contributors must consent to the use of their FTI on the FAFSA, even non -filers.**
- **Consent to redisclose to state entities, institutions, and scholarship organizations**
- **Only contributors may only see their own FTI**
- **Contributors can manually enter income and tax data manually on the FAFSA, but it will be rejected until consent is given.**



# FAFSA Demo

## August 17, 2023

### Dependent Student

# FAFSA Demo Screen Shot – Welcome



\_\_\_\_\_ I am starting the FAFSA form as a \_\_\_\_\_

☒ Student



☐ Parent



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# FAFSA Demo Screen Shot - Contributors

**FAFSA**<sup>®</sup> FORM 2024–25  Student Raya Tran

Understanding the FAFSA<sup>®</sup> Form

2 of 4

Contributors to the FAFSA<sup>®</sup> Form



### Parents or Spouses

Your answers on the FAFSA form will determine if any contributors need to be identified. These contributors will complete their own sections of the form and are asked to provide personal and financial information, but will not become financially responsible for your education.



### How to Invite

Contributors will need to log in with their own FSA ID to provide their information. To invite a contributor to your FAFSA form, you'll need to provide their name, date of birth, Social Security number, and email address.

Information or Documents You May Need ^

You might need the following information or documents as you fill out the FAFSA form:

- Tax returns
- Records of child support received
- Current balances of cash, savings, and checking accounts
- Net worth of investments, businesses, and farms

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# FAFSA Demo Screen Shot – What to Expect

**FAFSA**<sup>®</sup> FORM 2024–25 Student Raya Tran

Understanding the FAFSA<sup>®</sup> Form

3 of 4

**What To Expect**

How long will this take? ⌚ 1 hour

Every contributor must provide consent for you to be eligible for federal student aid. With your consent, we can obtain your federal tax information automatically from the IRS to help you complete the FAFSA<sup>®</sup> form. You can save the form and return to it later if you need more time.

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# FAFSA Demo Screen Shot – Consent & Sign

S0\_4 Provide Consent (10 of 67) Desktop (1440 x any) Preview Inspect Share 100%

An official website of the United States government. FOR DEMONSTRATION PURPOSES ONLY Help Center English Español

Federal Student Aid FAFSA Loans & Grants Repayment Loan Forgiveness

FAFSA FORM 2024–25 Student Raya Tran Save FAFSA Menu

## Provide Consent or Be Ineligible for Federal Student Aid

### Summary

Your consent is needed to retrieve and disclose federal tax information (FTI). With your consent, we can obtain tax return information automatically from the IRS to help you complete the FAFSA<sup>®</sup> form. If you don't provide consent, you will not be eligible for federal student aid, including grants and loans. You must provide consent even if you didn't file a U.S. federal tax return or any tax return at all.

- Get your 2022 tax return information for the 2024–25 FAFSA form.
- Tax return information is required to complete the FAFSA form.
- FTI is used to determine your eligibility for federal student aid.

Under penalty of law, I certify that I am the individual associated with the FSA ID log-in credentials used to access the FAFSA form to provide the necessary approval and consent for the disclosure and use of my federal tax information (FTI) from the U.S. Department of the Treasury. By accepting below, I approve and consent to:

- The U.S. Department of Education to disclose my Social Security number, last name, and date of birth to the U.S. Department of the Treasury in order to obtain my FTI only for the purpose of determining the eligibility for, and the amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program authorized under subpart 1 of Part A, Part C, or Part D of Title IV of the *Higher Education Act of 1965*, as amended.
- The use of my FTI by U.S. Department of Education officials and contractors (as defined in 26 U.S.C. § 6103(l)(13)), only for the purpose of determining the eligibility for, and amount of, federal student aid for myself or of others for which I participated and shared my FTI by a program authorized under Title IV of the *Higher Education Act of 1965*, as amended.
- The U.S. Department of Education to redisclose my FTI received from the U.S. Department of the



# FAFSA Demo Screen Shot – Dependent Personal Circumstances

FAFSA<sup>®</sup>

FORM 2024–25

Student Raya Tran

Save

FAFSA Menu

Your Personal Circumstances


Tell us about your marital status; your financial dependencies; your plans for college; and any other special circumstances that may impact your aid eligibility (including if you've been homeless or at risk of becoming so).


→ This information can affect how much aid you're eligible to receive.

→ Based on your answers, we may need to collect additional information from other people.

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Presented on September 6, 2023

# FAFSA Demo Screen Shot – Invite Parents

FAFSA<sup>®</sup>

FORM  
2024–25

Student Raya Tran

Save

FAFSA Menu

1

2

3

4

5

Personal Circumstances

Demographics

Financials

Colleges

Signature

Invite Parents to your FAFSA<sup>®</sup> Form

You will need to provide information for your parents

Based on your answers in the previous section, you'll need to provide information about both of your parents on your FAFSA form. You can invite your family members to your form to help you complete all required sections.

Enter names of parents, identified on the prior page, and we'll send electronic requests on your behalf.

Please make sure to provide information that your parents would use to login to StudentAid.gov.

Parent

First Name

Alcina

Last Name

Tran

Date of Birth

Month

Day

Year

05

05

1973

Parent Spouse

optional

First Name

Last Name

Date of Birth

Month

Day

Year

# FAFSA Demo Screen Shot – Invite Parents

FAFSA<sup>®</sup>

FORM

2024–25

Student Raya Tran

FAFSA Menu

You're Almost There!

The Student Section is complete!

Parent Contributors

Requirements for Dependent Students

Your FAFSA form is not complete until your parents complete the contributor section of the form and sign it. Once completed, your FAFSA form will be submitted for processing.

Parent Contributors	Date Request Sent	Status
<div>Alcina Tran</div>	07/13/2024	<div>Invite Sent</div> <div>Edit</div>
<div>Travis Tran</div>	07/13/2024	<div>Invite Sent</div> <div>Edit</div>

Track and Manage Your FAFSA Application and Your Contributors

View Status


This application has been added to My Activity in your StudentAid.gov account. Go there to:

Review, edit, or cancel any FAFSA application information.

Revise your household size, contact your schools.

Start your state application to apply for state-based financial aid




# FAFSA Demo Screen Shot – Parents Screen

 An official website of the United States government

Help CenterEnglish | Español

**FederalStudentAid**  
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

FAFSA ▾Loans & Grants ▾Repayment ▾Loan Forgiveness ▾

 Alcina ▾


## My Activity

### Currently Active


You have been requested to be a Contributor on a FAFSA for Raya Tran

The Free Application for Federal Student Aid (FAFSA) form helps students apply for federal grants, work-study, and loans.

[Decline Invitation](#)[Get Started](#)




#### Borrower Defense Case #07688447


 Action Required

Last Updated: 06/27/2022

#### PSLF Application

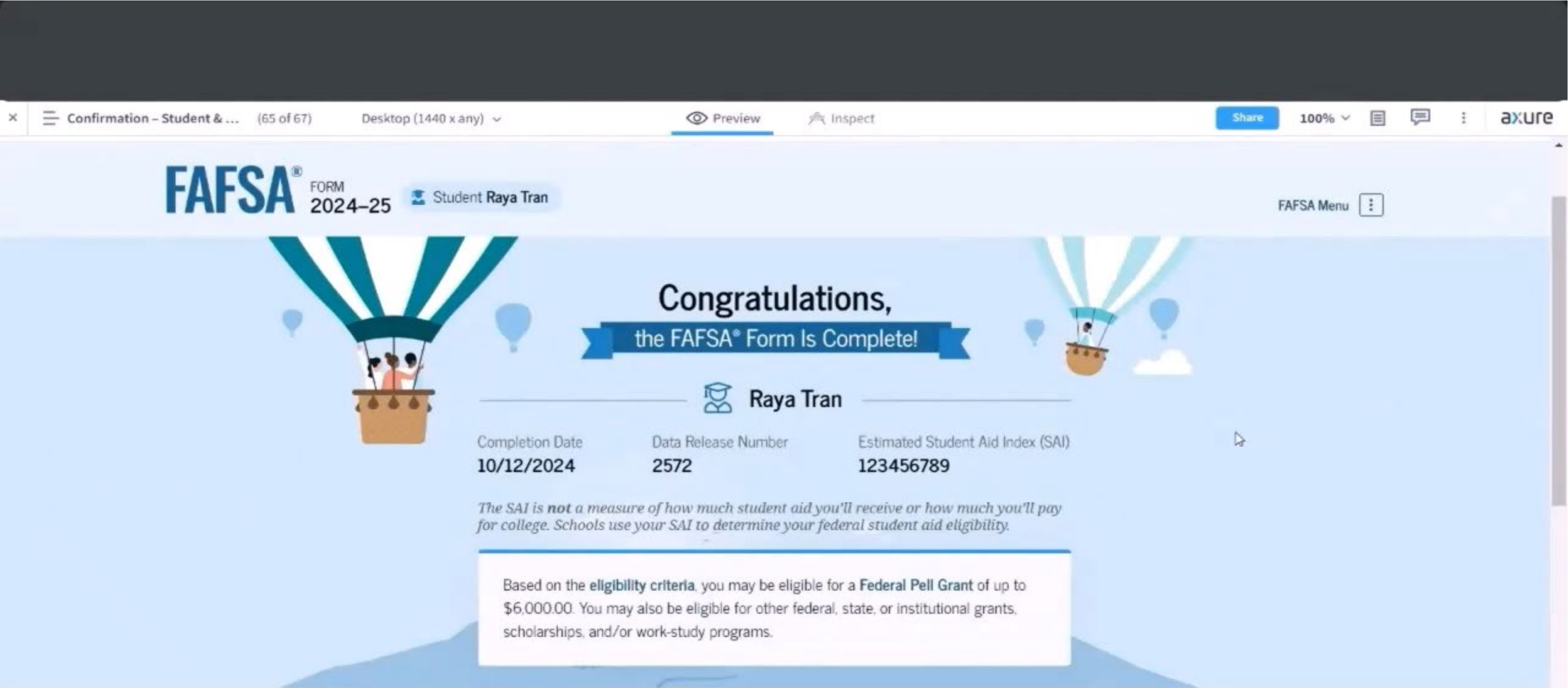
 Action Required

Last Updated: 06/22/2022

 The Peace Corps



# FAFSA Demo Screen Shot – Congratulations



## What Happens Next

 [Check Your Email](#)



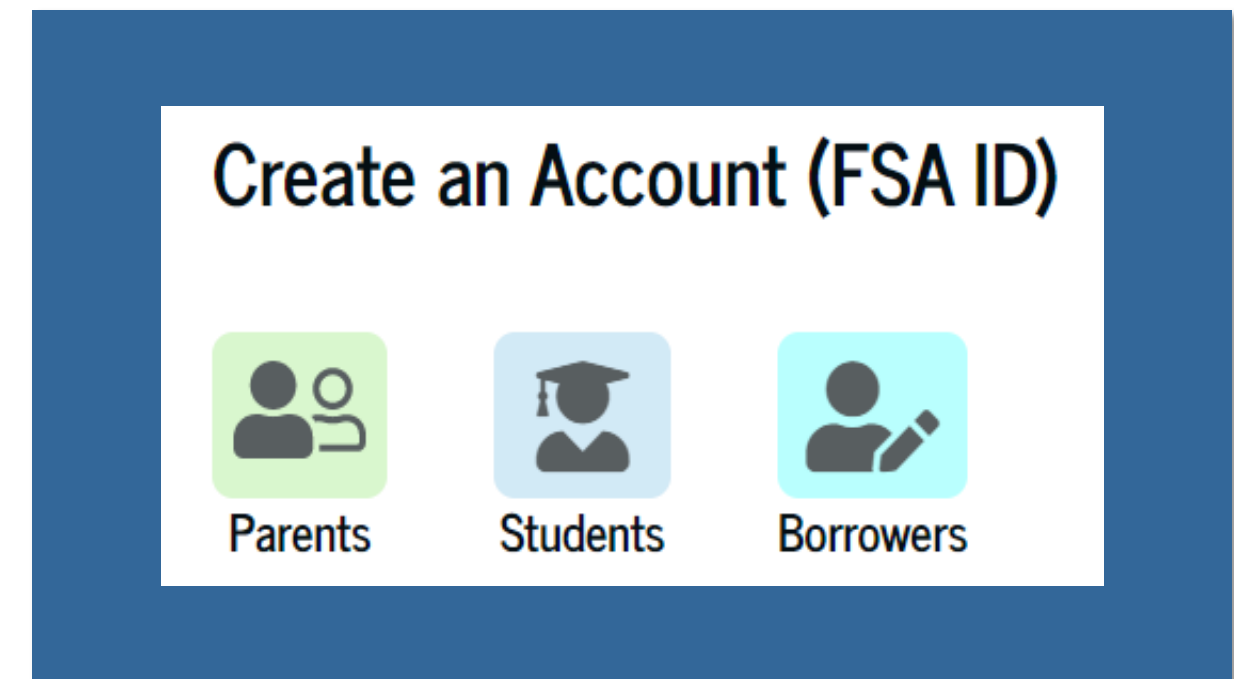
FSA ID



# Federal Student Aid (FSA) ID

The FSA ID is a digital signature used to:

- Sign the FAFSA, and Master Promissory Notes (Direct and Parent PLUS Loans)
- Access Federal Student Aid websites



**Each person creates their own FSA ID with SSN and Date of Birth**

(SSN no longer needed for parents who are not U.S. citizens)

**Student**

**Parent**



# FSA ID – Undocumented Parents

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- Impact to mixed status families
  - Current process –parents without an SSN can't create an FSA ID, but would submit a paper signature page
  - 2024 -25 –parents will be required to create an FSA ID
- FSA –verification through TransUnion
- If TransUnion not available, a process called “ID Proofing” or “knowledge -based identity” questions could become available
- No final process has been released.



# CSAC Better FAFSA, Better CADAA Efforts

# CSAC Teams

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## 1 FAFSA IMPLEMENTATION (TECHNICAL)

Technical specifications from FAFSA & ISIR changes are updated in Grant Delivery System to accept applications and process awards.

## 2 BETTER CADAA ENHANCEMENTS

Align application to all FAFSA changes and incorporate recommendations from undocumented workgroup

## 3 BETTER FAFSA PREPARATION

Develop and update communications, training, materials, and resources to support students and their families; high school counselors and educators; college financial aid administrators and professionals; and external community partners.



# Annual Statewide Financial Aid Workshops (ASF AW)

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- Events.com registration: [2023-2024 Annual Statewide Financial Aid Workshops](#)
- 60 In -Person Workshops and 5 Virtual Workshops scheduled for August through November
- Additional events in January and February after release of FAFSA/CADAA
- Currently over 9,000 registered for in -person and virtual sessions
- Focus on changes to FAFSA and CADAA, Cal Grant Reform, the success of All in for FAFSA/CA Dream Act, and how to continue with year 2
- First in person training was with Riverside County Office of Education on 8/31 and 9/1

# Educator and Professional Resources

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1

## Operations Memos and Special Alerts

- Communications centered on the upcoming changes around the 2024 applications -25 financial aid
- Released [GOM 2023 -13](#) in May 2023 and [GSA 2023 -47](#) on September 5, 2023
- Next communication scheduled in the Fall as more information becomes available

2

## Better FAFSA & CADAA Landing Page for Educators

- On CSAC homepage with a dedicated landing page for Better FAFSA, Better CADAA
- Upcoming key dates, milestones, targeted resources and events
- Resources from FSA, NCAN, and other partners

3

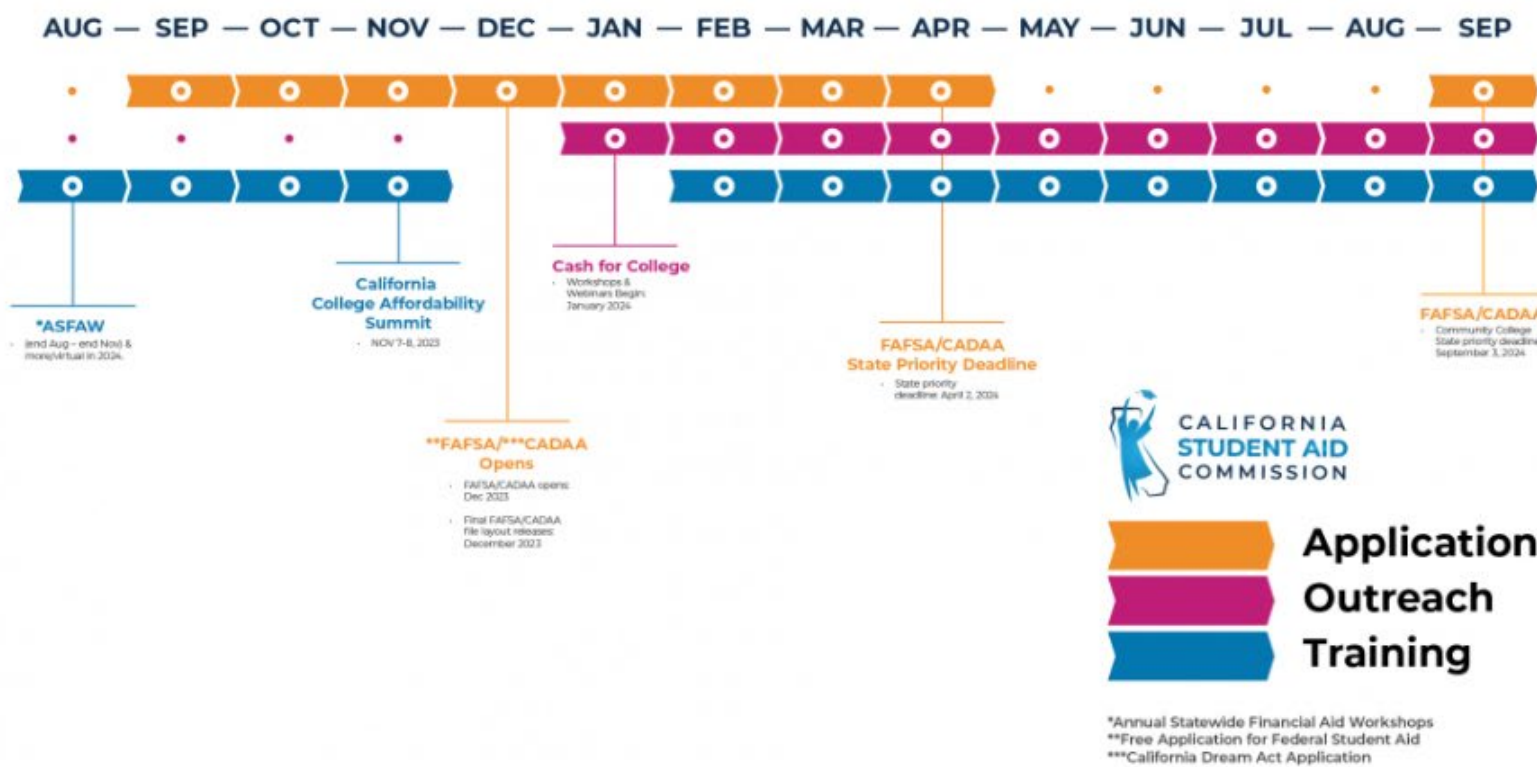
## Better FAFSA & CADAA Bulletin/Newsletter

- Periodic bulletin sent to list serve recipients with updates, best practices, and reminders of upcoming training events
- Content of bulletin will be embedded in the e-mail communication

# Better FAFSA, Better CADAA Landing Page



## Better FAFSA, Better CADAA Timeline





# Student Communications

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## CURRENT STUDENTS (Renewals)

- Inform of the changes to the FAFSA for the 2024 -25 school year and enhancements to CADAA.
- Provide the new deadline for both Better FAFSA and Better CADAA.
- Remind students to confirm their FSA ID and add any new contributors if applicable



## NEW STUDENTS (High school seniors)

- Using submitted GPA data
- Provide the new deadline for both Better FAFSA and Better CADAA.
- Encourage students to complete their FSA ID requirement for all contributors before the FAFSA opening
- Promote the Cash for College webinars starting on January 2024.





# Thank you!



@CASTUDENTAID

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VISIT US AT [WWW.CSAC.CA.GOV](http://WWW.CSAC.CA.GOV)

SIOC Committee

Presented on September 6, 2023