Today’s Agenda

- FAFSA Terminology
- FAFSA Notable Changes
- Formula: EFC to SAI
- Preparing to Apply
- 2024-25 FAFSA Application
- Online Resources
What is FAFSA Simplification?

FAFSA simplification was passed by Congress to make changes to the FAFSA application, including the first major redesign of the FAFSA process. The goal is to make applying for federal student aid easier for students.
When will the FAFSA application open?

The new application will open in December 2023. The Department of Education has not released the exact date yet.
What are the benefits?

- A more streamlined application process
- Reduced barriers for certain student populations (e.g., homeless and unaccompanied youth, incarcerated students, English language learners, and students from low-income backgrounds)
- A better user experience for the FAFSA form
- Expands eligibility for federal financial aid
Prominent Changes

Change #1:

Student, Parent(s), Guardian(s), and Spouse will now be referred to as contributors

- All contributors must make an FSA ID and consent to the FAFSA receiving their information from the IRS

Change #2:

“Household Size” will now be changed to “Family Size”

- FAFSA Contributor (student and/or parent) is given opportunity to manually update family size if it has changed since filing the tax return
Prominent Changes

Change #3:

Expected Family Contribution (EFC) will now be changed to Student Aid Index (SAI)

- SAI will be used from now on when referring to the amount that your family can help contribute towards your education

Change #4:

Contributors without a social security number must make an FSA ID

- If the individual does not have an SSN or ITIN, they will be directed through the knowledge-based identity authentication process. This will allow anyone, including undocumented individuals, to create an FSA ID.
Prominent Changes

Change #5:

Rather than importing their tax information using the IRS Data Retrieval Tool, your Federal tax information (FTI) will be transferred directly from the IRS to your FAFSA via FUTURE Act Direct Data Exchange (DDX)

- This will make it easier for families to input their tax information into the FAFSA and simplifies the applicant’s experience.

Change #6:

All contributors must consent

- Applicants will consent to providing their Federal Tax Information (FTI) via a direct data share with the IRS.
Change #7:

Dependency Status will now be changed to **Student Personal Circumstances**

- Your answers to questions on the FAFSA form determine whether you are considered a dependent or independent student.

Change #8:

**Student Aid Report (SAR) will be changed to FAFSA Submission Summary**

- This is the summary that is sent to you after you have submitted your FAFSA, which includes all of the information answered and the SAI that was calculated.
Prominent Changes

Change #9:

Number in college question will still be reported on the FAFSA but will no longer be used in your SAI calculation.

- You can still submit an appeal if there are special circumstances affecting the SAI amount calculated.

Change #10:

SAI can now be -1500.

- Before the lowest EFC was 0, but now it can go as low as -1500. This will increase Pell eligibility for students.
Q: How is my SAI calculated?
A: Most of the questions on your application will be used to calculate your SAI which is a measurement of your family’s financial strength. It will be used to determine your eligibility.

Q: How do I find out my SAI and how will it be used?
A: It will be listed on your FAFSA Submission Summary. It will be used to help prepare your financial aid offer, and to help you meet your financial need.

COA – SAI – Other Financial Assistance = Financial Need
Question Changes

Q: Will the questions be the same?

A: Several questions have been removed or changed including:

- Number in College (Changed)
- Housing question (Removed)
- Selective Service question (Removed)
- Drug conviction question (Removed)
- Room and Board (Changed)
- Pell Grant Calculation (Changed)
Pell Eligibility

The new need-analysis formula allows for a negative SAI calculation and implements separate eligibility criteria for Federal Pell Grants.

- Pell grants will be awarded based on the data received directly from the Internal Revenue Service (IRS) to calculate Federal Pell Grant eligibility, as well as the SAI calculated.
- Amounts awarded may differ from Pell Grant amounts awarded from prior years due to these changes.
- Federal Pell Grant access will be expanded and linked to family size and federal poverty levels, which will allow more students and families from low-income backgrounds to qualify.
- Federal Pell Grant access will be restored to incarcerated students under specific rules and programs.
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<tr>
<th>Old</th>
<th>New</th>
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<tbody>
<tr>
<td>EFC (Expected Family Contribution)</td>
<td>SAI (Student Aid Index)</td>
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<tr>
<td>Household Size</td>
<td>Family Size</td>
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<tr>
<td>Parent(s)</td>
<td>Contributor(s)</td>
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<td>Student Aid Report</td>
<td>FAFSA Submission Summary</td>
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<td>IRS Data Retrieval Tool</td>
<td>Direct Data Exchange (DDX)</td>
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Preparing to Apply: Federal Student Aid ID

- For the 2024-25 application, ALL contributors are REQUIRED to have a Federal Student Aid ID (FSA ID):
  - To access the FAFSA
  - To retrieve tax information using the IRS Direct Data Exchange (DDX), if applicable
  - To sign the FAFSA electronically

- Create your FSA ID now prior to the FAFSA opening in December 2023.
  - There will be a 5 day confirmation period before you can use it
  - The FSA ID can be retrieved if you have forgotten it

- For more details:
  - Scan the QR code to create your FSA ID
  - We also have a presentation (in both English and Spanish) that goes over the FSA ID requirements and creation on our FAFSA Simplification webpage
Preparing to Apply: Documents

- Student FSA ID (username and password)
- All contributor’s FSA ID’s
- Contributor's federal income tax return from tax year 2022 (if any contributors got an extension, complete soon to help with the process)
- Photo or copy of social security card and/or green card (if applicable)
- Student's 2022 federal income tax return, or evidence of income earned (W-2 form or pay records)
- Records of child support received and federal benefits (SNAP, WIC, TANF, etc) received
- Current balances of cash, savings, and checking accounts.
- Net worth of investments, rental properties, businesses, and farms.
- **UC Davis school code: 001313**
File the annual **FAFSA** or **California Dream Act** application (CADAA) between December 2023 – March 2, 2024 for priority aid consideration.

**FAFSA Application:**
- studentaid.gov

**CADAA Application:**
- dream.csac.ca.gov

**WebGrants 4 Students:**
- mygrantinfo.csac.ca.gov

**On WebGrants 4 Students:**
- View Cal Grant, Middle Class Scholarship or Chafee Grant status
- Ensure that a certified Grade Point Average (GPA) was submitted to the California Student Aid Commission
How to Get Started
Student Log In

- The student will log in to Start a New Form.
- All users will need to have a FSA ID.
Once your section is complete, you will see the Student Section Complete Page.

Any contributors will next need to log in and complete their portion of the application.
Dependent Student: Parent Log In

- The dependent student’s contributors will receive an email to log in to complete their section.
- All users will need to have a FSA ID.
Dependent Student: Parent Log In

- You will see your My Activity page once you successfully log in.
FAFSA Application: Parent Contributor Section

- Parent Onboarding Page
- Parent Identity Section
- Parent Demographics
- Parent Financials
- Parent Review Page
- Parent Signature
- Student FAFSA Confirmation Page
FAFSA Checklist

We are offering a FAFSA checklist (both in English and Spanish) to ensure you have all the necessary documents and information for your FAFSA application. You can also access all of our webinar Powerpoints.

You can find them here:
Future Webinars

We will be hosting additional webinars that will go over the FAFSA Simplification changes and the application, as well as more information on the CADAA:

FAFSA - November 30th @ 5pm (Zoom)

CADAA - Will be available soon

Sign Up Here:  

![QR Code](image)
We are here to help!

Find answers to your questions here and apply by March 2, 2024