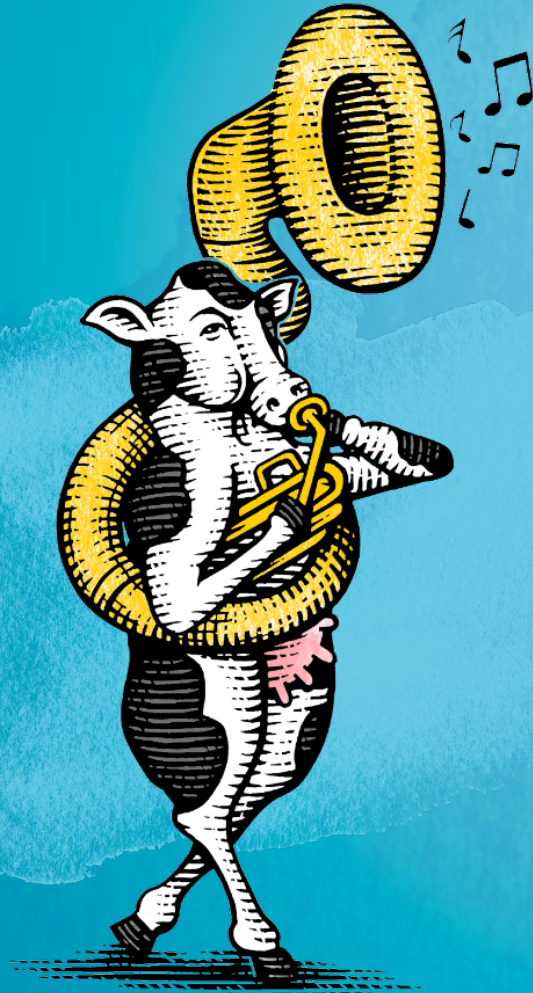




**FAFSA Simplification Changes**

# 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 and close?



The new application opened on December 31, 2023.

The priority deadline for full financial aid consideration is April 2, 2024.



# 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 Contributors (student and/or parent) are given the 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)**

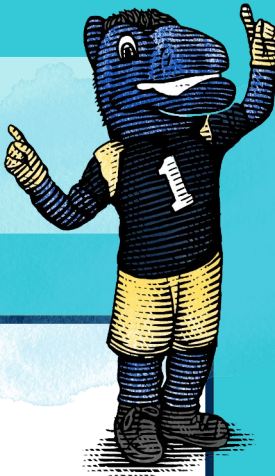
- SAI will be used from now on when referring to the amount that your family can help contribute towards your education

## 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.



# Prominent Changes

## Change #7:

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

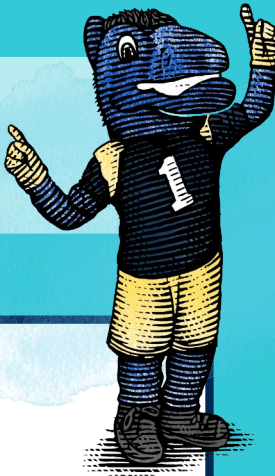
- Your answers to questions on the FAFSA form determine whether you are considered a dependent or independent student.

## 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.

## Formula: EFC to SAI

**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.

$$\text{COA} - \text{SAI} - \text{Other Financial Assistance} = \text{Financial Need}$$

## 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 offered 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 offered may differ from Pell Grant amounts offered 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.

# Terminology Changes to Remember

Old	New
EFC (Expected Family Contribution)	SAI (Student Aid Index)
Household Size	Family Size
Parent(s)	Contributor(s)
Student Aid Report	FAFSA Submission Summary
Dependency Status	Student Personal Circumstances
IRS Data Retrieval Tool	Direct Data Exchange (DDX)

# 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 completing the FAFSA.**
  - 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

Scan Me



# 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**



## Preparing to Apply: Websites

File the annual **FAFSA** or **California Dream Act** application (CADAA) between December 31, 2023 – April 2, 2024 for priority aid consideration.

### **FAFSA Application:**

- [studentaid.gov](https://studentaid.gov)

### **CADAA Application:**

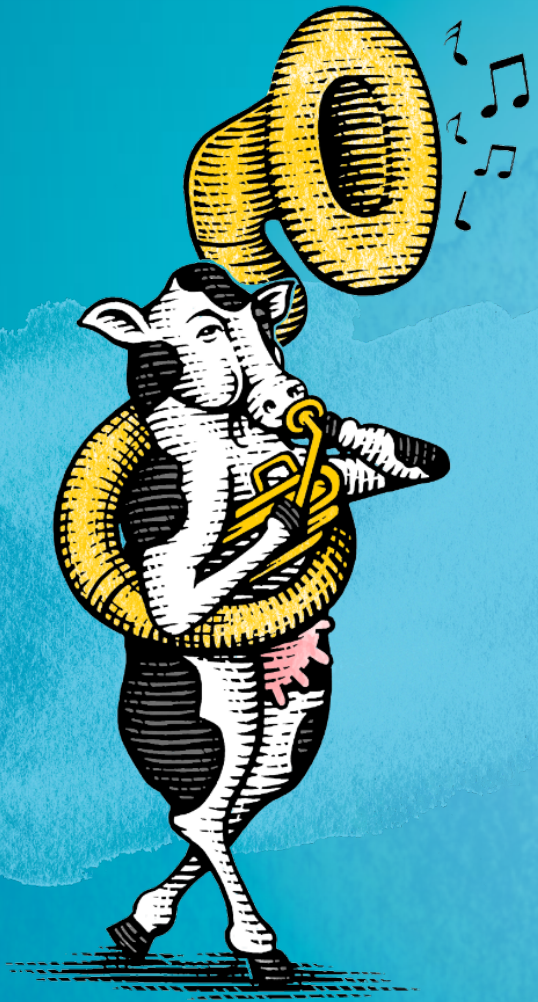
- [dream.csac.ca.gov](https://dream.csac.ca.gov)

### **WebGrants 4 Students:**

- [mygrantinfo.csac.ca.gov](https://mygrantinfo.csac.ca.gov)

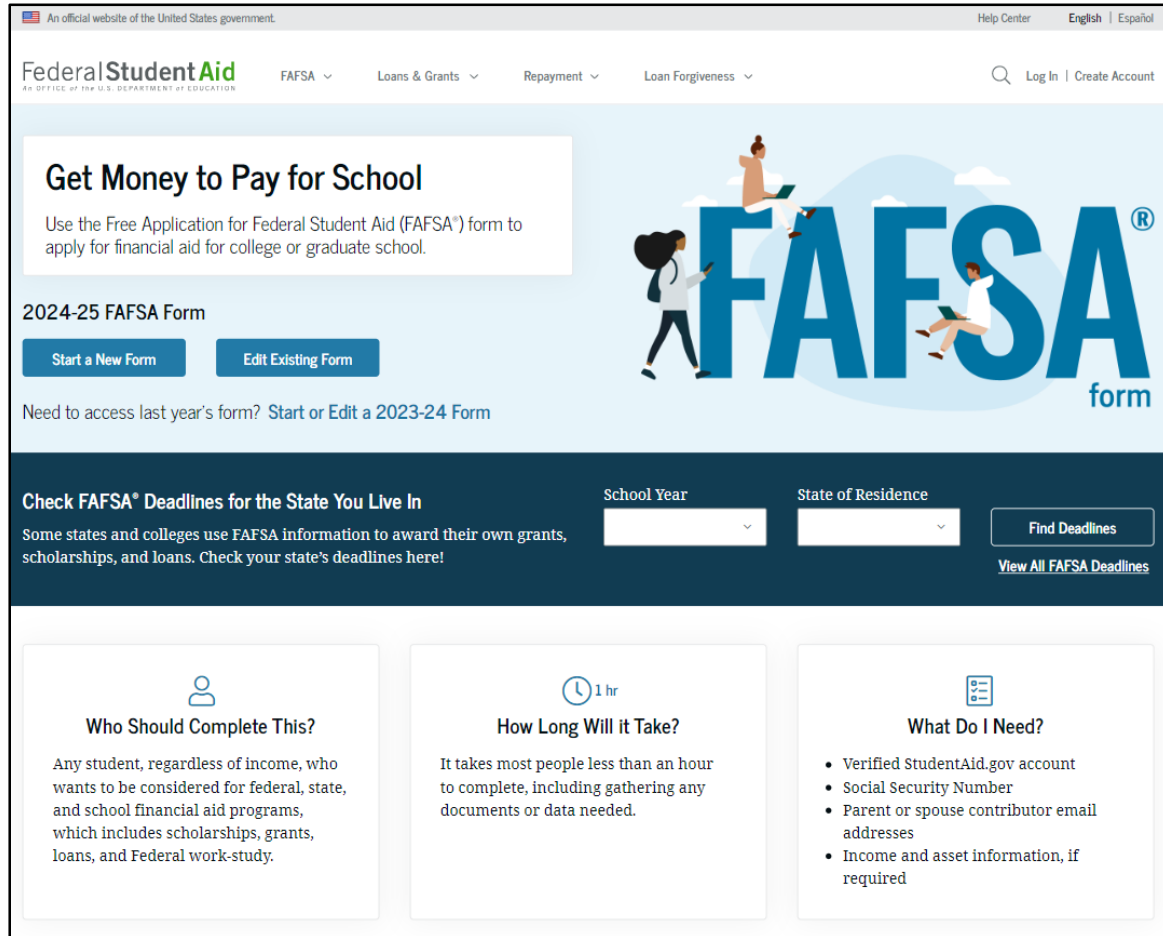
### • **On WebGrants 4 Students:**

- 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 screenshot shows the FAFSA website homepage. At the top, there is a navigation bar with the Federal Student Aid logo, menu items for FAFSA, Loans & Grants, Repayment, and Loan Forgiveness, and links for Log In and Create Account. The main content area features a large banner with the text "Get Money to Pay for School" and "Use the Free Application for Federal Student Aid (FAFSA®) form to apply for financial aid for college or graduate school." Below this, there are buttons for "Start a New Form" and "Edit Existing Form". A section titled "Check FAFSA® Deadlines for the State You Live In" includes dropdown menus for "School Year" and "State of Residence", a "Find Deadlines" button, and a link to "View All FAFSA Deadlines". At the bottom, there are three informational cards: "Who Should Complete This?", "How Long Will it Take?" (with a 1 hr icon), and "What Do I Need?" which lists requirements like a verified StudentAid.gov account, Social Security Number, and parent/spouse contributor email addresses.

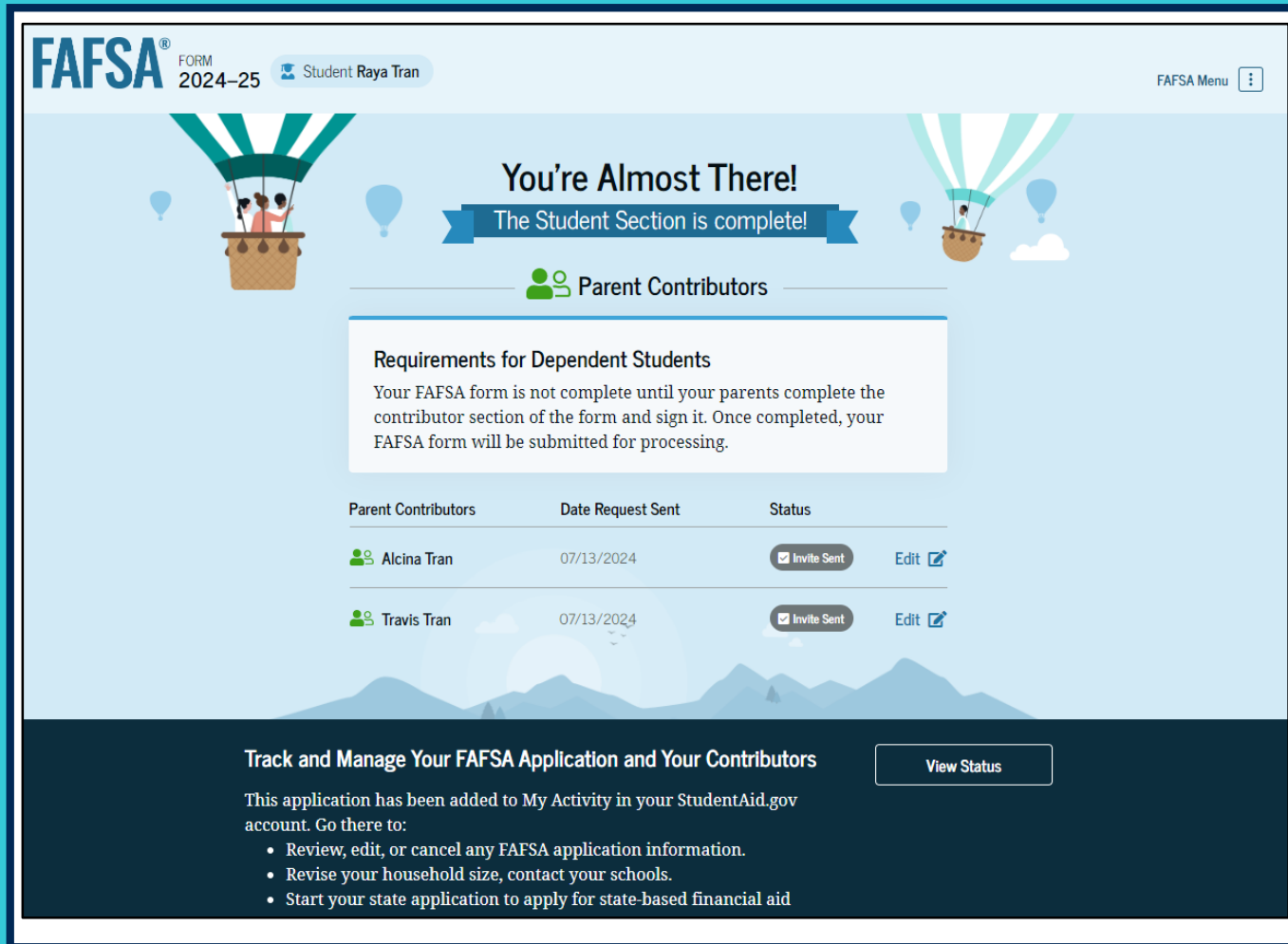
- The student will log in to Start a New Form.
- All users will need to have a FSA ID.

# FAFSA Application: Dependent Student Section



- Student Onboarding Page
- Student Personal Circumstances
- Student Demographics
- Student Financials
- Student Select Colleges
- Student Review Page
- Signature & Student Section Complete Page

# Student Section Complete Page



The screenshot shows the FAFSA Student Section Complete Page. At the top left, it says "FAFSA FORM 2024-25" and "Student Raya Tran". At the top right, there is a "FAFSA Menu" button. The main heading is "You're Almost There!" with a sub-heading "The Student Section is complete!". Below this, there is a section for "Parent Contributors". A white box contains the text: "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." Below this is a table with columns for "Parent Contributors", "Date Request Sent", and "Status".

Parent Contributors	Date Request Sent	Status
Alcina Tran	07/13/2024	<input checked="" type="checkbox"/> Invite Sent <a href="#">Edit</a>
Travis Tran	07/13/2024	<input checked="" type="checkbox"/> Invite Sent <a href="#">Edit</a>

At the bottom, there is a section titled "Track and Manage Your FAFSA Application and Your Contributors" with a "View Status" button. Below this, it says "This application has been added to My Activity in your StudentAid.gov account. Go there to:" followed by a list of instructions:

- 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

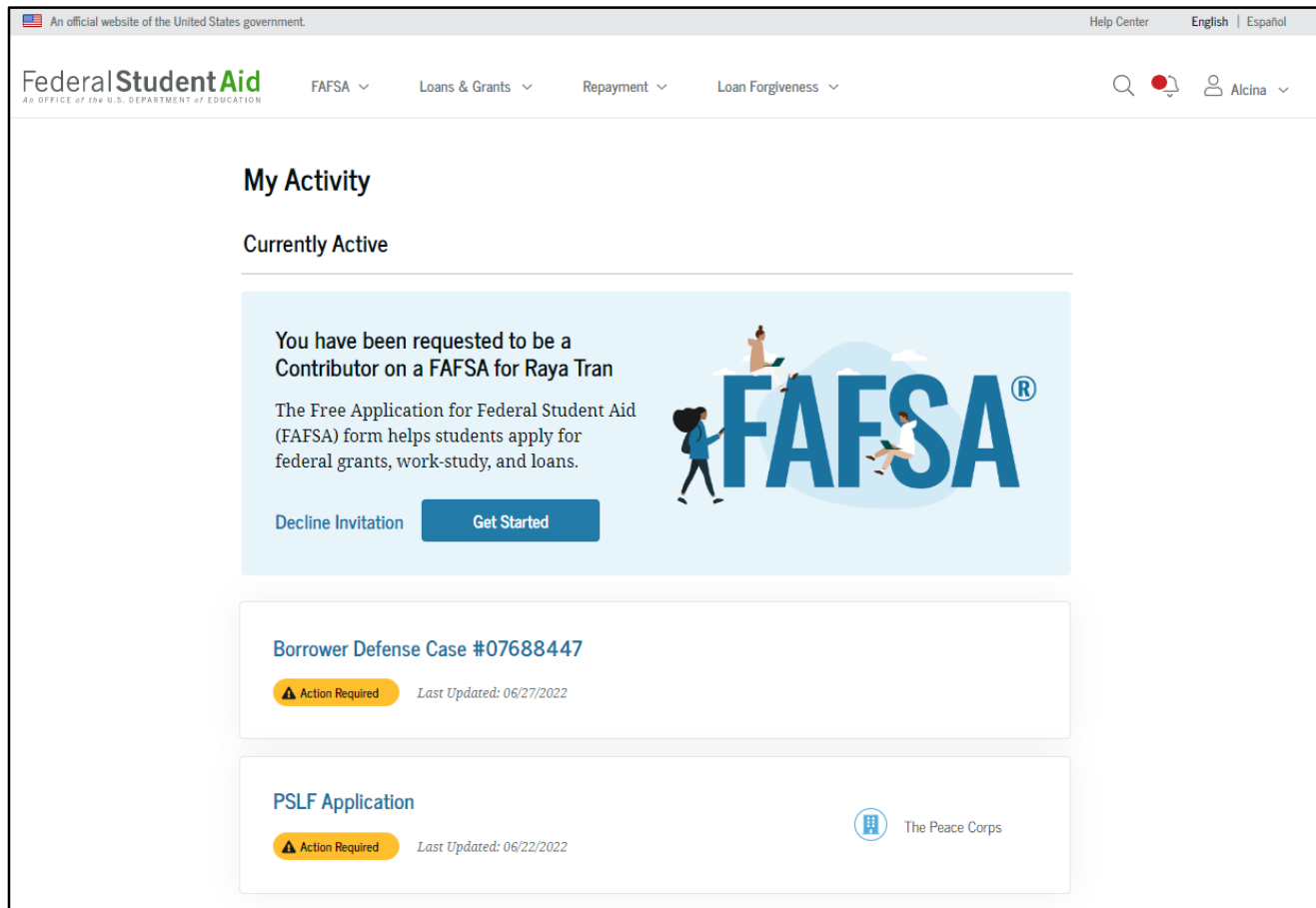
- Once your section is complete, you will see the Student Section Complete Page.
- Any contributors will next need to log in and complete their portion of the application.

# Dependent Student: Parent Log In

The screenshot shows the Federal Student Aid login interface. At the top, it identifies itself as an official website of the United States government. The main navigation includes links for 'FAFSA Form', 'Loans and Grants', 'Loan Repayment', and 'Loan Forgiveness'. A search bar and 'Log In | Create Account' link are also present. The central focus is the 'Log In' form, which includes a field for 'Email, Phone, or FSA ID Username' containing the text 'test595011623', a 'Password' field with masked characters and a 'Show Password' toggle, and a prominent blue 'Log In' button. Below the button are links for 'Forgot My Username', 'Forgot My Password', and 'Create an Account'. A 'Help Me Log In to My Account' link is located at the bottom of the form area. The footer contains additional navigation links like 'Help Center', 'Contact Us', 'Site Feedback', 'About Us', 'Announcements', 'Data Center', 'Resources', and 'Forms Library', along with social media icons and a notice for 'usa.gov | vote.gov | ed.gov | Site Feedback'.

- 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



An official website of the United States government. Help Center English | Español

FederalStudentAid An OFFICE of the U.S. DEPARTMENT of EDUCATION FAFSA Loans & Grants Repayment Loan Forgiveness

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

- 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 presentations.**

**You can find them here:**





# We are here to help!

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



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