

Operational Update and Program News

March 29, 2023



2022-23 Award Year



2022-23 Monetary Award Program (MAP)

- ISAC is now accepting third term payment claims
 - Claim deadline date is Friday, May 5, 2023
 - Initial claims must be submitted no later than 7 p.m. (CT) to be considered timely
 - Any initial claims or increases to third-term claims made after the deadline date will be considered late and will only be paid if funding is available after paying timely claims
- First-term and second-term initial claims and increases to previously submitted claims are currently being held, however, colleges are encouraged to continue to submit them in the event that late claims are able to be paid
- Colleges are also encouraged to continue reconciling and submitting cancellations and/or adjustments to decrease previously-submitted claims for all terms
 - Cancellation and adjustment data factors into our analysis of whether or not late claims can be paid.

Also, please note:

- There is currently no suspension of 2022-23 MAP award announcements
- A mid-year recompute of MAP awards (which took place during the 2021-22 award year),
 will **not** be needed for the 2022-23 processing cycle



Nursing Education Scholarship Program (NESP)

- Certification functionality for the NESP program is now available in the GAP Access portal for the second/spring term
- This process must be completed so that second term disbursements can take place
- Certification of second term eligibility is the only function that will take place in GAP Access
- Disbursement of second term awards will occur in the same way as first term, with funding coming from the State Comptroller's office
 - Stipends will be sent directly to students
 - Scholarship funds will be sent to the schools
- Disbursement is anticipated for later this spring
- Schools are encouraged to complete the eligibility certification for the second term as soon as possible

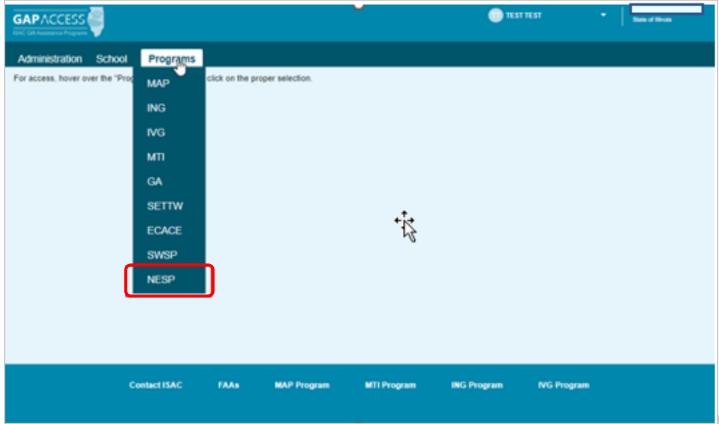


NESP Certification in GAP Access

- Financial aid staff with active GAP Access accounts must update NESP program privileges under the Administration tab:
 - Set to "Update" for staff who will be editing or updating data
 - Set to "View" for staff who will not be involved in submitting data to ISAC, but need to view eligibility information
- After logging into GAP Access, select NESP from the program list
- The NESP Certification List: View screen will have a list of recipients attending your institution
- The Certification List: Filter function can be used to view/select certain records for certification in a particular order
 - For example, by term or by status
- Clicking on the student's name or Social Security Number (SSN) will open the student record and provide access to the Certification Data Screen
- Detailed instructions for completing certifications can be found in the <u>NESP</u>
 <u>Certification User Guide</u>

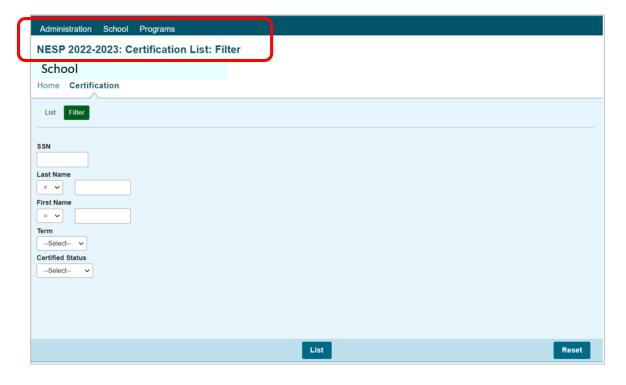


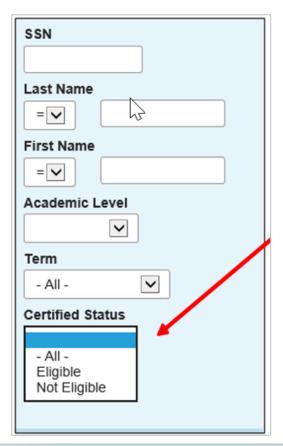












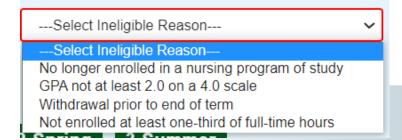


Certification Data Student Name Yes V Eligible: Number of Credit Hours Enrolled: Number of credit hours for Full-time status: Student's GPA Amount of Tuition/fees Not Covered by Other Funding (except for student loans): ---Select Program of Study----Program of Study: -Select Program of Study-Anticipated Graduation Date (Month Certificate in Practical Nursing Associate Degree in Nursing and Year, must be future): Hospital-based Diploma in Nursing Baccalaureate Degree in Nursing Ineligible Reason: Graduate Degree in Nursing Graduate Degree in Nursing (become Nurse Educator) Save/Submit Close 1-Fall 2-Spring 3-Summer Terms Tuition Amount Stipend Amount



NESP Certification

- Fields that must be completed on the Certification Data screen will be highlighted in red, based on whether the eligible field is completed as "Yes" or "No"
- If a school answers "Yes" to the student's eligibility, the following fields will need to be completed:
 - Number of credit hours enrolled
 - Number of credit hours of full-time status
 - Student's GPA
 - Amount of tuition/fee not covered by other funding
 - Program of study using the drop down selection
 - Anticipated Graduation Date
- If a school answers "No" to the students eligibility, they will need to select an ineligible reason using the drop down box





NESP Certification

- After providing data elements for the required field(s), click on the Save/Submit button to complete the process.
- Once you've saved the data, the student's certification is complete, and the student will no longer appear on the Certification List screen.
- Once the student record is certified and saved, changes cannot be made by the school
- If changes are needed, you will need to contact ISAC's School Services Department by email at: <u>isac.schoolservices@illinois.gov</u> or by phone at: 866-247-2172
- A webinar on the NESP Program will offered on Monday, April 10
 - o An e-message will be sent out soon with additional information



Minority Teacher of Illinois (MTI) Scholarship

- Although first and second-term payment request deadline dates have passed, ISAC is continuing to accept and pay claims for these terms.
 - The second-term payment request deadline date was February 24,
 2023
- The timely submission of claims and cancellations/adjustments allows ISAC to monitor remaining funds and award other students, as applicable.
- As additional rounds of awarding occur, School Services will notify impacted colleges by sending an email to the Financial Aid Directors
 - Colleges should confirm that this does not create a dual-award situation for students who may also be eligible for GA or SETTW before requesting payment
 - ISAC will rely on documentation that a student has submitted regarding their scholarship preference, however, the student can also work with the college and ISAC to change their preference



Early Childhood Access Consortium for Equity (ECACE) Scholarship

- The 2022-23 application remains available
 - Applications will continue to be considered for as long as funding remains available
- As part of our efforts to leverage appropriated funds and award to as many eligible students as possible, priority payment request deadline dates are established for each term
 - Although first- and second-term payment request deadline dates have passed, ISAC is continuing to accept and pay claims for these terms
 - Colleges are encouraged to complete submitting payment requests as soon as possible
 - Timely submission of claims and cancellations/adjustments allows ISAC staff to monitor remaining funds and award other students, as applicable
- ECACE payment results are available twice per week, on Tuesdays and Fridays
 - A Payment Result Summary and Invoice Detail Report can be viewed or printed by selecting the report tab in the ECACE system.
 - In addition to this Thursday's regularly scheduled payment processing run, we will also be doing a processing run on Friday, March 31.



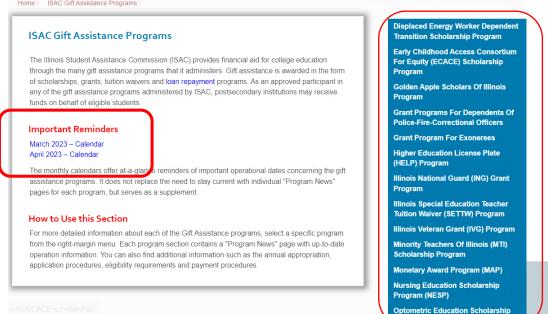
Other 2022-23 Programs

- Grant Programs for Dependents of Police/Fire/Correctional Officers
 - Certification of enrollment for payment for winter and spring terms have been mailed to financial aid directors
 - Payment request deadline for winter and spring terms is Friday, April 21, 2023
- Displaced Energy Worker Dependent Transition Scholarship
 - The online application was launched in February; deadline for full year consideration is on or before June 15, 2023
- Post-Master of Social Work School Social Work Professional Educator License Scholarship Program
 - Application date was February 28, 2023
 - Completed applications submitted after that date will be considered only if available funding remains after all timely complete applicants have been awarded
- Illinois National Guard (ING) Grant
 - Submit spring term benefit usage is due on or before April 7
- Illinois Veteran Grant (IVG)
 - Submit spring term benefit usage is due on or before April 21



Program Processing Reminders

- Be sure to review your payment results reports in GAP Access after submitting your program claims to ensure everything processed as expected
- Result codes can be found in the User Guides and in the FAA area of isac.org
- Payment and reconciliation is an offset process so no refund checks should be sent to ISAC for adjustments until final reconciliation of the award year
- Watch the Program News pages and e-messages for program updates
 - isac.org/isac-qift-assistance-programs/





2023-24 Award Year



Timeline -- Preparing for 2023-24 MAP

- January May 2023
 - o Spring legislative session of the 103rd General Assembly
 - Scheduled to adjourn by May 19
 - ISAC analysis of budget proposals, as well as other legislative proposals
- February 2023
 - Governor's State of the State and Budget Address, delivered on February 15
 - Proposed \$100 million increase for MAP
- April 2023
 - Collection of 2023-24 budget data from MAP-approved colleges begins
- May 2023
 - ILASFAA MAP Formula Committee Meeting to discuss recommendations for the Recompute Formula
 - Expect to have a finalized state budget (approved by the General Assembly and the Governor)
- June 2023
 - o Budget data collection process completed
 - Propose MAP Recompute Formula to ISAC Commissioners for approval on June 22
 - Approved maximum award amount for the 2023-24 award year announced
 - Cannot exceed maximum in statute
 - Recompute Formula implemented and new award amounts announced, if applicable



2023-24 ISAC Program Applications

Illinois Special Education Teacher Tuition Waiver (SETTW)

- o 2023-24 online application is available
- Priority application consideration date was March 1, 2023
- At this time, student data related to the 2023-24 SETTW application is not appearing for colleges in the SETTW system.

Minority Teachers of Illinois (MTI) Scholarship Program

- o 2023-24 online application is available
- Priority consideration date was March 31, 2023
 - 2023-24 FAFSA or, if applicable, the 2023-24 Alternative Application must also have been received by March 31, 2023 to be considered timely

Golden Apple Scholarship

- Deadline for student applications is April 1, 2023
- Application and awarding is performed by the foundation

Nursing Education Scholarship Program (NESP)

- The application opened on March 1, 2023
- Application/Promissory Note/Grant Agreement must be submitted by April 30, 2023
- Program administration for 2023-24 will take place in ISAC's GAP Access system



2023-24 ECACE Program

- This will be the third year of this federally-funded program
- Application is expected to be available in May
 - Can't open until the 2022-23 application is no longer open to student applicants
- Enhancements will be implemented that will expand access to the program
 - Intent is to expand eligibility to make sure that many more of those in the incumbent workforce may access scholarships and upskill
 - Preliminary information has been sent to consortium representatives, with more details coming soon



2023-24 ECACE Program

This is what's staying the same:

- Eligible students must still be incumbent early childhood workers (work or have worked in a congregate care setting like child care or preschool that serves children from birth to age five)
- Institutions must continue to support currently eligible students, with an emphasis on those without an Associate or Bachelor's degree and specifically those who wish to transfer from a two- to four-year institution.
- Students must intend to work in an early childhood congregate care setting post-graduation



2023-24 ECACE Changes

Newly eligible students will include:

- Those seeking AA degrees with a concentration in early childhood (limited, with forthcoming guidelines from ICCB)
- Freshmen and sophomores at four-year institutions
- Those with a Bachelor's degree seeking:
 - Courses to make them eligible for a lead teacher position in a licensed program
 - Professional Educators License with an EC Endorsement
 - Additional endorsements (Bilingual, ESL, Special Education) or letters of approval
 - Master's degrees in early childhood for those seeking licensure
- Both ISAC and institutions will need a little time to adjust and make some plans for communication, outreach and procedural updates



Budget Reporting Process



ISAC Budget Reporting Process

- Pursuant to ISAC Rules [Section 2700.30 (e)], postsecondary institutions participating in gift assistance programs with ISAC shall annually report tuition and fee charges to ISAC on or before June 1 preceding each academic year.
- The process to collect 2023-24 budget data for MAP, IVG & ING will begin the week of April 3, 2023
- The due date to submit is June 1, 2023
- An e-message will be sent with more details when the system becomes available for data collection
- ISAC will offer Budget Completion Webinars in April & May
 - April 11 at 2:00 p.m.
 - April 12 at 10:00 a.m.
 - Additional sessions will also be offered in May; dates to be determined



Fiscal Year 2023 (2022-23 Award Year) Budget Reporting

- For the 2022-23 budget data collection process, colleges were asked to provide a main rate, which is generally defined as:
 - a school's in-state or in-district (if applicable), tuition and mandatory fees for full-time, freshmen undergraduate students for the regular school year
- This was a shift from previous budget data collection guidance, which collected the highest possible rate
- The main rate is the rate that is typically faced by the majority of students
- Also incorporated the new definition of mandatory fees that went into effect July 1, 2022



Fiscal Year 2024 (2023-24 Award Year) Budget Reporting

Reporting tuition

- Colleges should continue to provide a main rate, which is generally defined as:
 - a school's in-state or in-district (if applicable), tuition and mandatory fees for full-time,
 freshmen undergraduate students for the regular school year
- Reporting fee data
 - For MAP & IVG, provide mandatory fee information
 - Mandatory fees are defined as: the charges assessed by an institution that are required to deliver educational services to students for each term, regardless if the student is attending on campus or through distance education. Application, graduation, laboratory, breakage, add/drop fees, and program administrative fees for out -of-state or foreign study are specifically excluded. For the purpose of ISAC rules, tuition is not a mandatory fee
 - For the ING Grant, data should be provided for "certain fees"
 - Fees specifically included in statute: Registration, Graduation, General Activity, Matriculation, Term
- Budget information for all approved programs and all approved school codes must be certified by the financial aid director.
 - The Certify button appears only for a user who has Budget Confirm privileges.



Reporting Differential Rates

- For FY22, ISAC adjusted tuition data to the main tuition rate for purposes of the MAP recompute formula
 - Schools were then provided with an opportunity to provide differential rates for FY22 for students who are enrolled in a higher cost program of study that assesses higher charges (above the main rate)
- For FY23, ISAC only collected main tuition rate data
- For FY24, ISAC will be collecting main and differential rate data for both FY23 and FY24
 - Since differential budget data was not collected during the FY23 budget collection process, schools will be asked to provide that during the FY24 budget collection process
 - Schools that would like to add a differential budget code for FY24 may do so by contacting the School Services Department



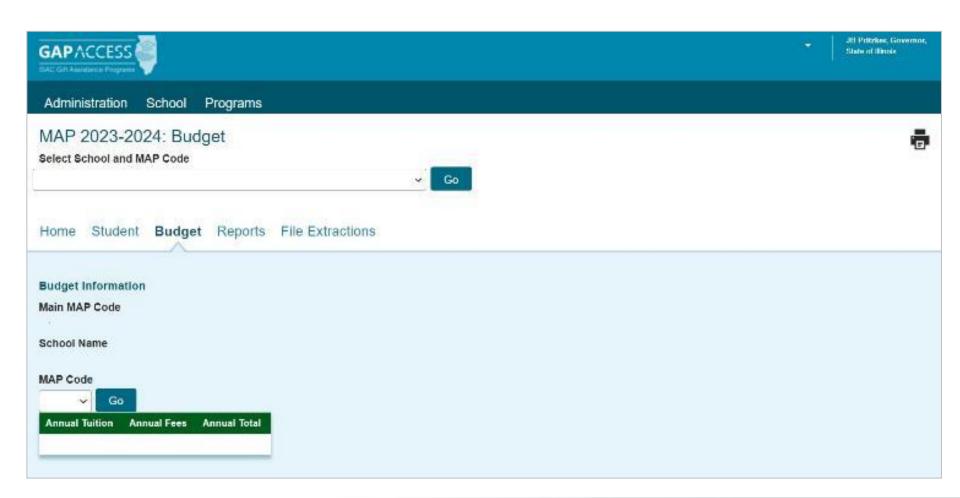
What's New for 2023-24 Budget Reporting

- An additional screen has been added to the MAP section of the School Budget system titled On-Campus Mandatory Fees
 - o It has been added as the 5th tab in the MAP section
 - The purpose of this tab is to collect on-campus only mandatory fees
 - Instructions on the screen ask that schools report the mandatory fees typically faced by students in a traditional 16-hour on-campus, non-distance education enrollment
 - Enter the TOTAL per term and per year fee charges assessed by your institution that are required to deliver educational services to students for each term. The fee table below lists the same 11 general fee categories reported on Tab 2 and the figures reported here may be similar or identical to the overall Mandatory Fees figures reported on Tab 2, however, the fees reported on this screen should represent a mandatory fee package typically faced by a traditional on-campus student. Report the mandatory fee amounts for each type of fee based on 16 semester hours or 12 quarter hours.
- This additional data is being collected for the purpose of calculating a mean-weighted tuition and fee rate faced by a typical on-campus student, which ISAC uses and provides to other state partners for a variety of purposes

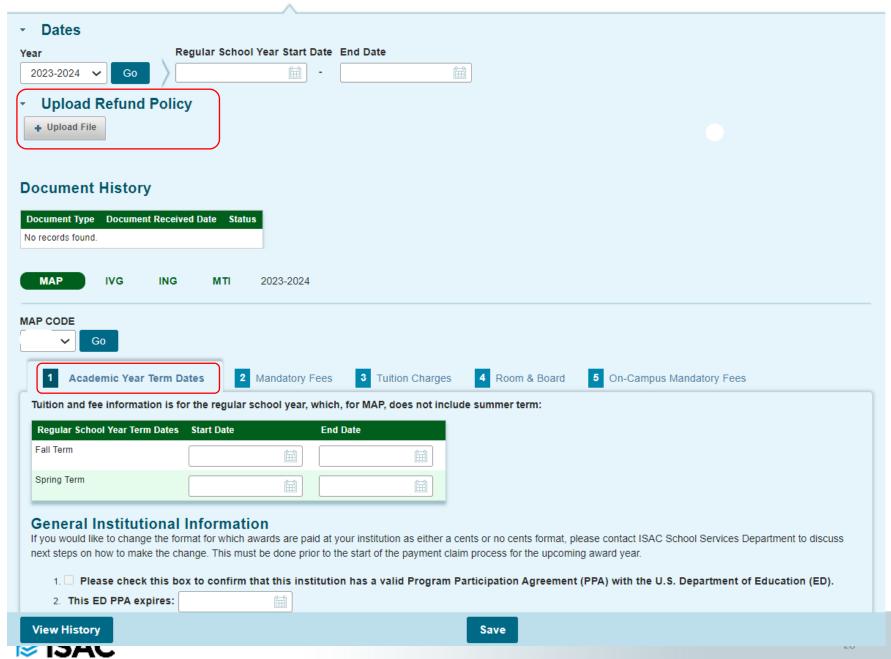


2023-24 Budget Reporting

The annual budget reporting process will begin week of April 3, 2023







1 Academic Year Term Dates

2 Mandatory Fees

3 Tuition Charges

4 Room & Board

5 On-Campus Mandatory Fees

The fee table lists 10 general fee categories. Using these fee categories as a guide, enter the TOTAL per term and per year fee charges assessed by your institution that are required to deliver educational services to students for each term, regardless if a student is attending either on-campus or through distance education. Report the mandatory fee amounts for each type of fee based on 16 semester hours or 12 quarter hours per term. For examples of possible mandatory fee charges, see the Budget Reporting User Guide. Application, graduation, laboratory, breakage, and add/drop fees, as well as program administrative fees for out-of-state or foreign study, are specifically excluded. For purposes of ISAC's rules, tuition is not a mandatory fee.

If a school has a one-time annual fee, it should be included in the appropriate field in the Maximum column after the calculation has been applied, then click on the Calculate button again.

- For example, if an institution applies a technology fee of \$1,000 per year, add \$1,000 to the technology field in the maximum column after the term fees have been calculated.

If a fee in the term amount in the left column needs to be zeroed out, the user must also zero out (manually delete) the Maximum amount in the right column.

If a term amount in the left column was zero or the amount previously reported needs to be adjusted, click on the Calculate button to correct the Maximum amount in the right column.

Type of Fee	Dollars per term based on 16 hours per term	Multiply by 2	Maximum charge for a two term regular school year (32 hours)
Activity	\$		\$
Bonds	\$		\$
Facility Operations	\$		\$
Grants	\$		\$
Health	\$		\$
Instructional Support	\$		\$
Registration	\$		\$
Student Services	\$		\$
Technology	\$		\$
Transportation	\$		\$
Other	\$		\$
TOTAL MANDATORY FEES	\$ 0.00	Calculate	\$ 0.00

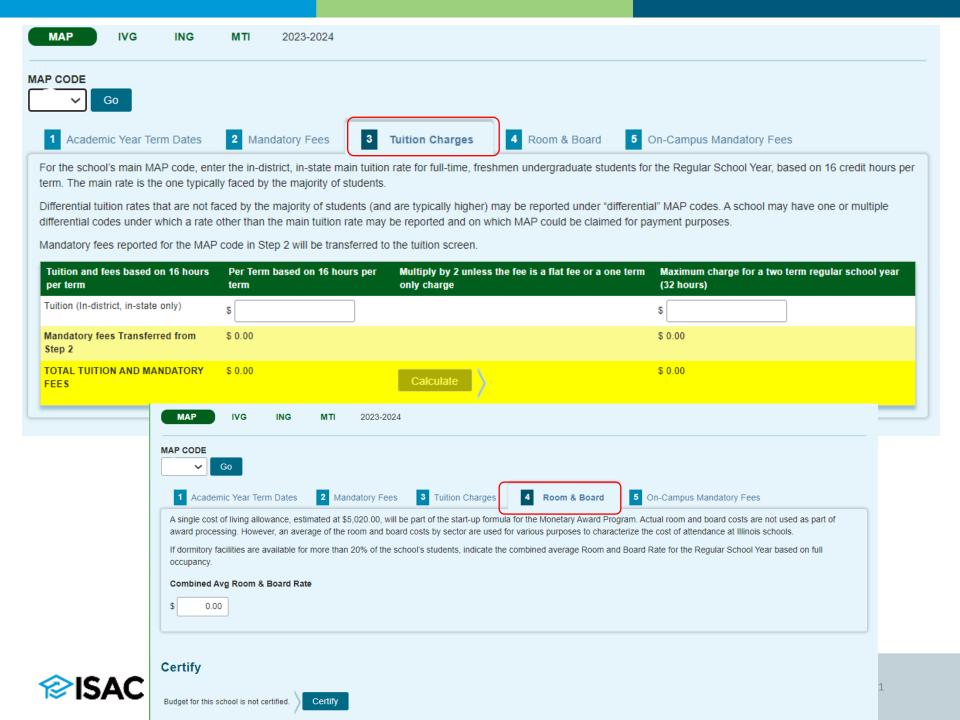


Mandatory Fees Examples

- Fees reported to ISAC do not have to have the exact same fee name as those noted below in order to be considered an eligible mandatory fee, however, it's recommended that they be reported in a category that most closely matches up to the ISAC terminology.
- It's also important to maintain internal documentation regarding the purpose of each fee reported, particularly for fees that are not clearly defined by its name or that include a broad range of charges under one fee name.

Category	Examples of Fees
Activity	Fitness Center, Recreation Center, General Activities, Gym
Bonds	
Facility Operations	Sports Facility, Event Arena, Concerts, Dormitory Service, Library, Student Union, Campus Improvements, General Facilities Maintenance, Facilities Upgrades
Grants	Grant-In-Aid, Talent Grant
Health O	Health Insurance, Health Clinic, Health Services, Visits with Doctors and/or Nurses, Health Maintenance Organization, Pharmacy
Instructional Support	Book Store ID, Copying, Instructional Materials, Publications, Textbook Rental
Registration	
Student Services	Student Support, Career Services, Placement Office, Student Senate, Leadership Events, General Fee, Student Attorney, Comprehensive
Technology	Internet, Computer Technology, Distance Learning, Electronic Music Center, Media Resources
Transportation	Parking, Shuttle Bus, Transit, Student Passes





1 Academic Year Term Dates

2 Mandatory Fees

3 Tuition Charges

4 Room & Board

On-Campus Mandatory Fees

The purpose of this tab is to collect **on-campus only mandatory fees**. Please report the mandatory fees typically faced by students in a **traditional 16-hour on-campus**, **non-distance education enrollment**.

Enter the TOTAL per term and per year fee charges assessed by your institution that are required to deliver educational services to students for each term. The fee table below lists the same 11 general fee categories reported on Tab 2 and the figures reported here may be similar or identical to the overall Mandatory Fees figures reported on Tab 2, however, the fees reported on this screen should represent a mandatory fee package typically faced by a traditional on-campus student. Report the mandatory fee amounts for each type of fee based on 16 semester hours or 12 quarter hours. For examples of possible mandatory fee charges, see the Budget Reporting User Guide. Application, graduation, laboratory, breakage, and add/drop fees, as well as program administrative fees for out-of-state or foreign study, are specifically excluded. For purposes of ISAC's rules, tuition is not a mandatory fee.

One-time annual fees should be included in the appropriate field in the Maximum column after the calculation has been applied. - For example, if an institution applies a technology fee of \$1,000 per year, add \$1,000 to the technology field in the maximum column after the term fees have been calculated.

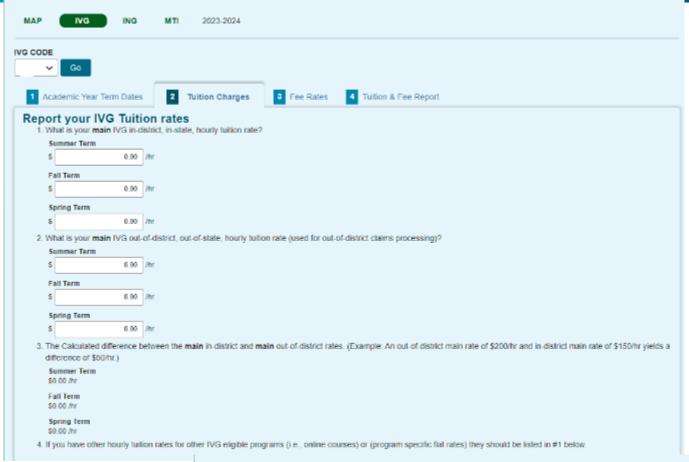
If a fee in the term amount in the left column needs to be zeroed out, the user must also zero out (manually delete) the Maximum amount in the right column.

If a term amount in the left column was zero or the amount previously reported needs to be adjusted, click on the Calculate button to correct the Maximum amount in the right column.

Type of Fee	Dollars per term based on 16 hours per term	Multiply by 2	Maximum charge for a two term regular school year (32 hours)
Activity	\$		\$
Bonds	\$		\$
Facility Operations	\$		\$
Grants	\$		\$
Health	\$		\$
Instructional Support	\$		\$
Registration	\$		\$
Student Services	\$		\$
Technology	\$		\$
Transportation	\$		\$
Other	\$		\$
TOTAL ON CAMPUS MANDATORY FEES	\$ 0.00	Calculate	\$ 0.00

View History

Save



Additional IVG Rates

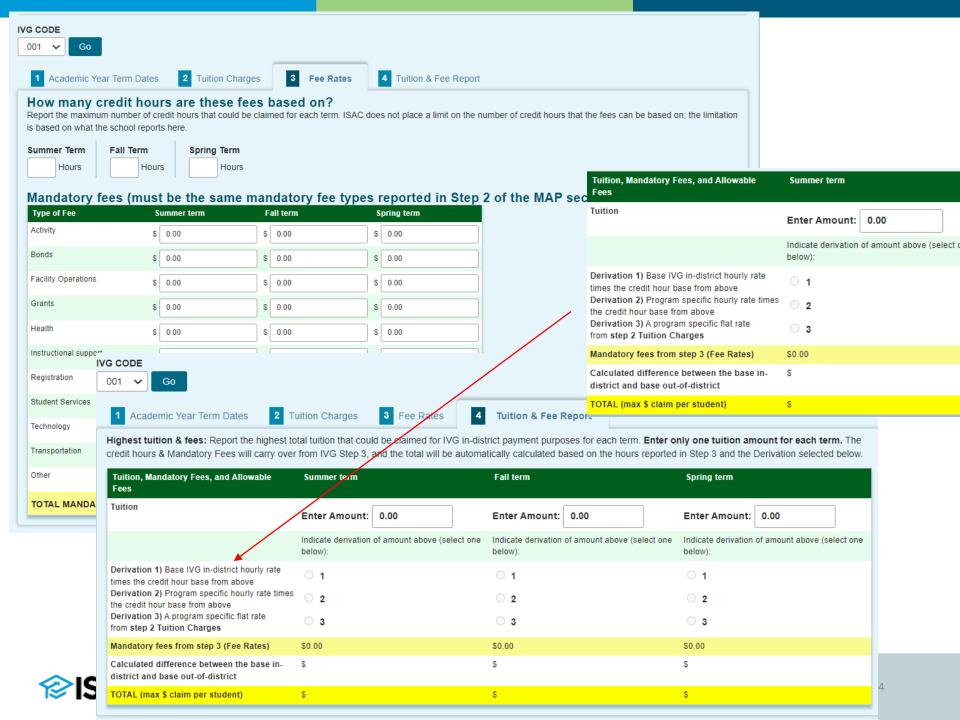
1. Hourly Tuition rates (please report your most common hourly rates)?

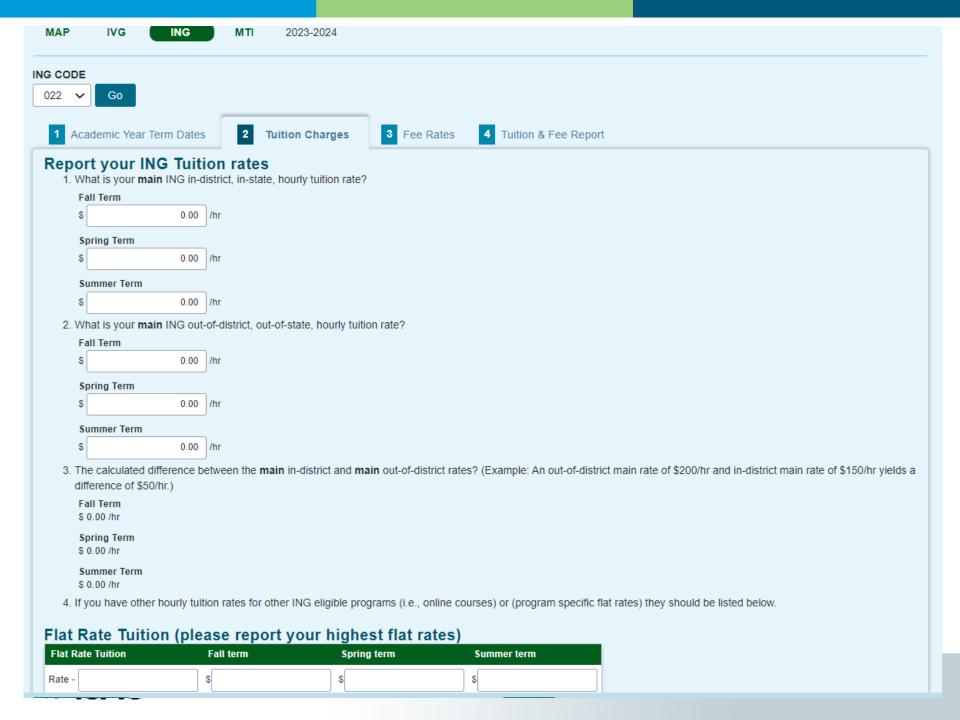
Program Titles	Summer term hourly Tuition rate	Fall term hourly Tuition rate	Spring term hourly Tuition rate
Rate 1 -	\$	\$	\$
Rate 2 -	\$	\$	\$
Rate 3 -	\$	\$	\$
Rate 4 -	\$	\$	\$
Rate 5 -	\$	\$	\$

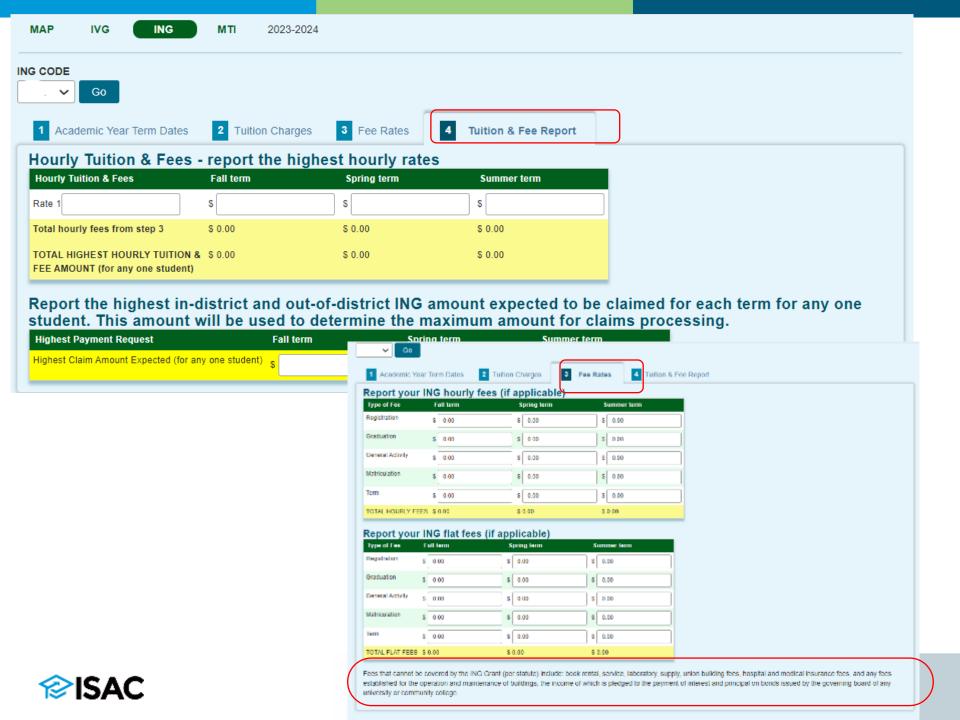
2. Flat Rate Tuition (please report your highest flat rates)

Flat Rate Tuition/Program	Summer term	Fall term	Spring term
Rate -	\$	\$	\$

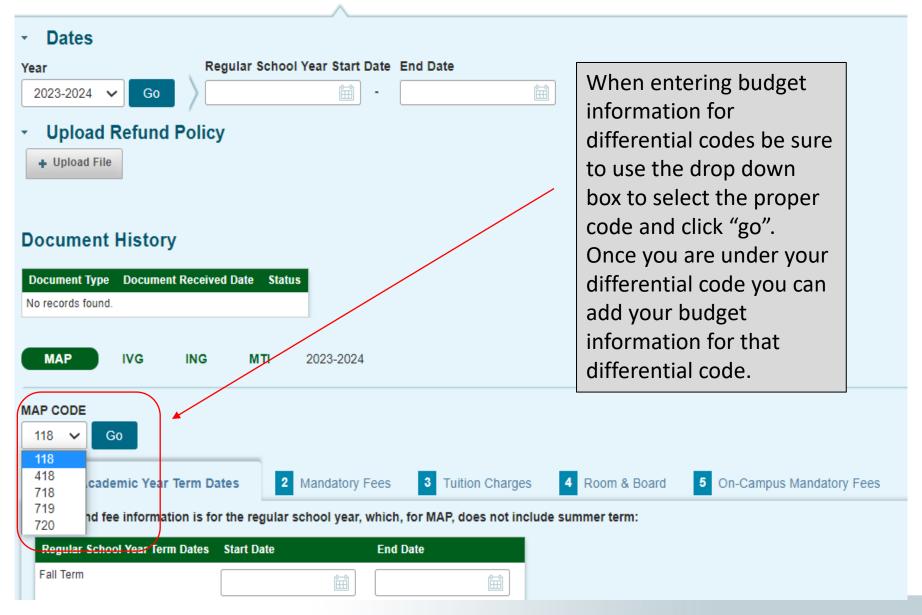








School Demographics Add School School Budget





Federal Student Aid 2023-24



FAFSA® Simplification Act Changes for Implementation in 2023-24

- Detailed guidance was provided in <u>Dear Colleague Letter (DCL) GEN-22-15</u>, issued on November 4, 2022
 - <u>fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2022-11-03/fafsar-simplification-act-changes-implementation-2023-24</u>
- Topics covered include:
 - Cost of Attendance
 - What changed and what remained the same
 - Definitions
 - Updated definitions of commonly used COA terms
 - Special Populations
 - Confined or incarcerated students COA
 - o Professional Judgement
 - Special Circumstances-Unusual Circumstances
 - Unaccompanied Homeless Youth
 - Pell Grant LEU Restoration
 - Pell Grant Eligibility for Incarcerated Students
 - Changes to FAFSA form
 - Q & A section



Cost of Attendance (COA) for 2023-24

What has changed?

- Language regarding costs for rental or purchase of equipment, materials, or supplies has moved out of the definition of "tuition and fees" and into a broader definition of "books, course materials, supplies, and equipment."
- Transportation expenses may include transportation between campus, residences, and a student's place of work.
- "Room and board" are now known as "food and housing," although the meaning of the terms remains the same. Food and housing are grouped as "living expenses."
- Living expense categories now break out costs associated with specific housing and food situations and require standard allowances within certain categories, such as on or off campus and with or without a meal plan.
- Institutions may no longer include loan fees for non-Federal student loans borrowed by students.



Cost of Attendance (COA) for 2023-24

What has changed? (Continued)

- The costs of obtaining a license, certification, or first professional credential are no longer restricted to a one-time allowance.
- "Course materials" and "the cost of obtaining a license, certification, or a first professional credential" were added to the types of expenses that an institution may include in a confined or incarcerated individual's COA.
- The types of expenses that an institution may include in the COA for a student who is enrolled less than half time has been broadened to include components not otherwise prohibited by the law. For example, an allowance for students in work related to a cooperative education program is permissible because that COA element [HEA Sec. 472(a)(12)] does not exclude less-than-half-time students, while miscellaneous personal expenses [HEA Sec. 472(a)(4)] are not includable, as noted below.



Cost of Attendance (COA) for 2023-24

What remains the same?

- A student must be enrolled at least half time for miscellaneous personal expenses to count in the student's COA.
- There were no changes to the definitions of the following components: study abroad expenses, cooperative education expenses, dependent care expenses, and disability-related expenses.
- There were no substantive changes to the COA components for students engaged in correspondence study or distance education under section 472(a)(6) and section 472(a)(11) of the HEA, respectively



Definitions -- COA Terms

- The definitions of terms commonly used in determining COA can be found in Dear Colleague letter GEN 22-15
 - <u>fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2022-11-03/fafsar-simplification-act-changes-implementation-2023-24</u>
- Consumer information requirements explicitly states that an institution must make COA information publicly available on its website.
- The Act expands existing consumer information requirements by explicitly stating that each institution must make COA information publicly available on its website. The disclosure must include a list of all COA elements and must appear on any portion of the website that describes tuition and fees.
- Previously the Department was not permitted to establish regulations on cost of attendance. Under the Act, the Department may now regulate the cost of attendance, except for tuition and fees, and may choose to do so in the future to provide clarity in this area.



COA for Special Populations

The following student populations have cost of attendance requirements based on their unique situations.

- Cost of attendance for students engaged in a program of study by correspondence must include tuition and fees and, if required, books, course materials, supplies, and equipment. A school may also include an allowance for travel, housing, and food costs incurred specifically for a period of residential training.
- The cost of attendance for confined or incarcerated students may only include:
 - Tuition and fees
 - Books, course materials, supplies, and equipment
 - o The cost of obtaining a license, certification or a first professional credential
- The cost of attendance for students enrolled less than half-time:
 - Must include any components (tuition and fees; books, course materials, supplies, and equipment; and transportation) normally applied to students who are enrolled less than half-time, along with any other components (disability expenses, etc.) that are not expressly prohibited for less than half-time students (e.g., miscellaneous personal expenses).
 - May also include an allowance for living expenses, including food and housing costs, for up to three semesters, or the equivalent, with no more than two semesters being consecutive.
- For students receiving all or part of their instruction by means of **distance education**, no distinction may be made with respect to the mode of instruction in determining costs.
 - For example, an institution may not eliminate the transportation cost component for a distance education student.



Professional Judgement 2023-24

The FAFSA Simplification Act distinguishes between different categories of professional judgment by amending section 479A of the HEA.

- Special Circumstances refer to the financial situations (loss of a job, etc.)
 that justify an aid administrator adjusting data elements in the COA or in the
 EFC calculation.
- Unusual Circumstances refer to the conditions that justify an aid administrator making an adjustment to a student's dependency status based on a unique situation (e.g., human trafficking, refugee or asylee status, parental abandonment, incarceration), more commonly referred to as a dependency override.
- A student may have both a special circumstance and an unusual circumstance. Financial aid administrators (FAAs) may make adjustments that are appropriate to each student's situation with appropriate documentation.



Professional Judgement 2023-24

What has changed?

- Institutions may not maintain a policy of denying all professional judgment requests but must consider all such requests. Therefore, institutions must develop policies and processes for reviewing those requests.
- Institutions must disclose publicly that students may pursue an adjustment based on special or unusual circumstances.
- Institutions may use a dependency override determination made by a financial aid administrator at another institution in the same or a prior award year.



Professional Judgement 2023-24

What remains the same?

- Institutions must make and document professional judgment determinations on a case-by-case basis without regard to how broadly an event may affect its student population.
- In making case-by-case determinations, the FAA must substantiate the student's circumstance with supporting documentation.
- Previous reasons for exercising professional judgment (e.g., unemployment, dislocated worker, school tuition expenses) are still allowable.
- A dependency override for unusual circumstances is considered unique from a determination of independence for homeless youth or at-risk homeless youth.



FAFSA Simplification Federal Student Aid 2024-25



FAFSA® Simplification Act Changes for Implementation in 2024-25

- To help ensure that partners, students and families are prepared for a successful 2024–25 FAFSA cycle, ED launched a Roadmap which provides an implementation timeline of what can be expected and when in terms of resources, guidance, and training materials for the newly-designed 2024-25 FAFSA®
- Here are links to recent ED communication about the 2024-25 FAFSA:
 - https://fsapartners.ed.gov/knowledge-center/topics/fafsa-simplificationinformation/2024-25-fafsa-roadmap
 - https://fsapartners.ed.gov/knowledge-center/library/electronicannouncements/2023-03-21/implementing-2024-25-fafsa-process
 - https://fsapartners.ed.gov/knowledge-center/library/electronicannouncements/2023-03-27/notice-draft-2024-25-federal-student-aid-applicationmaterials



Institutions and State Partners

Resource	Delivery Date
New Need Analysis Formula Tools	Spring 2023
These tools will help financial aid administrators understand the difference between the Expected Family Contribution (EFC) and the new Student Aid Index (SAI), including a crosswalk, comparison case studies, and revised Federal Pell Grant look-up tables.	
Provisional Final FAFSA Institutional Student Information Record (ISIR) Layout This near-final ISIR record layout will allow software developers to support institutions and states in determining eligibility for student aid.	April 2023
Policy Guidance	Spring through Fall 2023
Official guidance documents will help ensure institutions are legally compliant in their implementation of the FAFSA Simplification Act and the FUTURE Act. The guidance will cover topics including Federal Pell Grants for incarcerated students, use of federal tax information, homeless youth determinations, verification, and FAFSA reporting requirements.	



FAFSA Specifications Guide

This multi-volume technical reference provides financial aid administrators and software vendors critical technical details for upcoming changes and software systems updates. The release schedule for each volume aligns with software development cycle needs with record layouts and edits in March/April, followed by processing details and testing in the following months.

- Volumes 1–2 cover the summary of changes and implementation schedule of the FAFSA processing system.
- Volumes 3–7 cover technical changes to the ISIR layouts including reject, comment, and processing codes.
- Volumes 8–9 cover technical changes to agency matches, testing data, and the web demo system.

Beginning March 2023



Financial Aid Administrator Training	Summer 2023
These webinars will provide detailed training about the changes to application, eligibility, and data use so aid administrators can counsel families and update compliance procedures. The training will include topics such as consent and federal tax information, old and new ISIR layouts, verification and professional judgment, the Student Aid Index deep dive, and the Federal Pell Grant formula.	
Sample ISIR Datasets for Testing Sample student records will be available for software developers to test their eligibility calculations.	July 2023



Final ISIR Layout A final student record layout will be available for institutions and software providers to finalize their financial aid management systems.	October 2023
FAFSA Demonstration Site The FAFSA testing and demonstration website will be available for counselors and financial aid administrators to show staff, students, and families how to access and navigate the 2024–25 FAFSA form.	December 2023
2024–25 FAFSA Available	December 2023



Counselors and Advocates

Resource	Delivery Date
Financial Aid Estimator and Preview Tools Online tools for students and families will provide an early estimate of their Student Aid Index and potential eligibility, as well as visual previews of the 2024–25 FAFSA form.	Summer 2023
Counselor Training Webinars and train-the-trainer sessions, offered in collaboration with college access organizations, will provide detailed training to counselors about the key changes in the application process and eligibility determination. This training will help counselors better support students and families.	Summer through Fall 2023
Fact Sheets One-page resources for counselors about priority topics identified by college access professionals will include understanding the Student Aid Index, creating an FSA ID, assisting students with unusual circumstances, and use of federal tax information.	Summer through Fall 2023
2024–25 FAFSA Available	December 2023



Students and Families

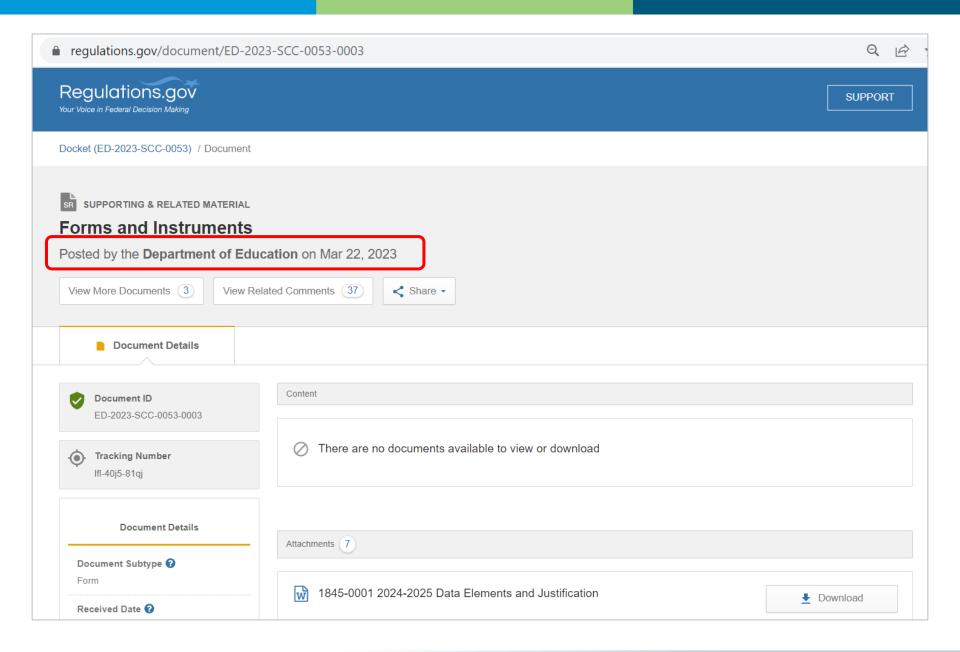
Resource	Delivery Date
Preparing for 2024–25 FAFSA Outreach Campaign	Summer 2023
A communications campaign, including videos, directed to students and families highlight what they should do to prepare for the new FAFSA form. The campaign also will provide key facts about what to expect from the new FAFSA process, including how to create an FSA ID, features of the 2024–25 FAFSA form, and Federal Pell Grant eligibility.	
Financial Aid Estimator and Preview Tools Online tools for students and families will provide an early estimate of their Student Aid Index and potential eligibility, as well as visual previews of the new FAFSA form.	Summer through Fall 2023
FAFSA Information Updates on StudentAid.gov Ongoing updates to FAFSA information and help resources will be posted to StudentAid.gov.	Summer through Fall 2023
2024–25 FAFSA Available	December 2023



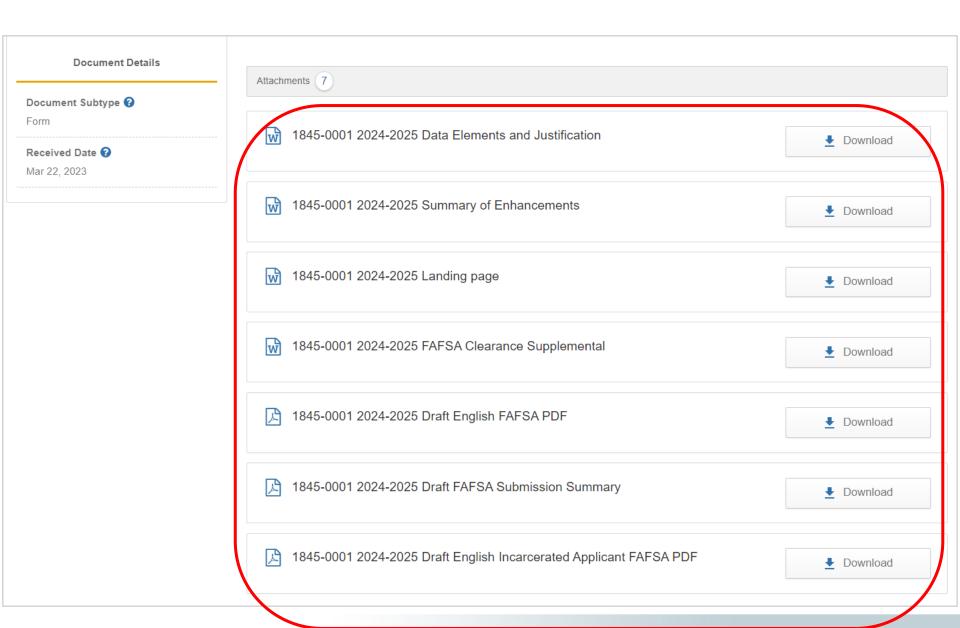
FAFSA® Simplification Act Changes for Implementation in 2024-25

- Draft versions of the proposed 2024–25 FAFSA® form and the *FAFSA* Submission Summary (formerly known as the Student Aid Report) have been posted and are available for public comment.
 - https://fsapartners.ed.gov/knowledge-center/library/electronicannouncements/2023-03-27/notice-draft-2024-25-federal-student-aid-applicationmaterials
- The public is invited to review the draft documents and submit comments on or before May 23, 2023.
 - Drafts of the 2024–25 FAFSA form, FAFSA Submission Summary, Summary of Enhancements, and other documents can be viewed at this link: https://www.regulations.gov/document/ED-2023-SCC-0053-0003
- In addition to the drafts, a summary of changes document is also available











Summary of Enhancements to the FASFA form for 2024-25

Planned Changes for Both the Online and PDF Forms:

Substantial changes to the overall form: Due to the large-scale revision of the FAFSA form this year, there are significant changes to the questions required throughout the form. Users may also notice that form sections are in a different order than before. This new organization will generally be aligned between the online and PDF versions of the form.

Creation of a roles-based solution: This new form design allows users to fill out only the portion of the form pertinent to them. Each role (student, parent, other parent, and student spouse) identified as required on a particular FAFSA form completes their own section. If completing the form online, they must log in with their FSA ID to access and complete their section.

Collection of spouse information: Due to requirements in the FUTURE Act, we will now collect student spouse and parent spouse information in some instances. Depending on the tax filing status of married students and parents, we may require the spouse to answer some questions about their own tax return.



Consent required for Federal Tax Information (FTI): All users identified as required on a particular FAFSA form will be prompted to provide consent. This consent is required to retrieve FTI from the IRS and calculate aid eligibility. If any party to the FAFSA form does not provide consent, submission of the form will still be allowed. However, a Student Aid Index (SAI), which replaces the Expected Family Contribution (EFC), will not be calculated.

Unusual circumstances and special circumstances definitions: The definitions of these terms have been aligned with those in the Higher Education Act. "Unusual circumstances" now refers to scenarios that prevent dependent students from providing parent information and may result in a dependency override. "Special circumstances" now refers to financial situations which an FAA may determine warrant a professional judgment.

Limited skip logic: The FAFSA Simplification Act requires us to collect more information from each applicant. This means that most users will be answering the same set of questions, with only limited opportunity to skip certain questions if particular criteria are met.

List of colleges expanded: Students will now be able to list up to 20 colleges on their online FAFSA form, and 10 colleges on the FAFSA PDF.



Planned Changes Exclusive to the Online Form:

Removal of ability to access a FAFSA form through student personal identifying information (PII): For 2024-25 and forward, users will be required to sign in to StudentAid.gov in order to start, submit, or view their FAFSA form. This provides an additional layer of security and ensures only those with appropriate permission may access applicants' information.

Elimination of the save key: If someone is identified as a contributor on a student's FAFSA form, their FSA ID account will be directly linked to that application. No more save key will be needed to share FAFSA access between required users or to retrieve a saved application or correction.

Removal of the IRS Data Retrieval Tool (DRT): Due to legislative requirements outlined in the FUTURE Act, FSA will now directly transfer federal tax information (FTI) from the IRS into the FAFSA form as long as the user has provided FSA with the consent to do so. Users will no longer need to access the separate IRS DRT portal in order to import their tax information.

Planned changes to the Student Aid Report

Document name change to FAFSA Submission Summary: The Student Aid Report (SAR) will be referred to as the FAFSA Submission Summary and will reflect the updated question labels in the 2024-25 FAFSA form.



Dates to Remember...

- April 10 NESP Webinar, 2:00 p.m.
- April 11 ISAC Budget Reporting Process Webinar, 2:00 p.m.
- April 12 ISAC Budget Reporting Process Webinar, 10:00 a.m.
- April 13 Commission Meeting
 - More details, including agenda items will be available prior to the meeting at isac.org/about-isac/commissioners/index.html
 - An Executive Briefing for Financial Aid Directors will be offered on April 18 at 2 p.m.;
 watch for further details in an e-message closer to the date
- April 26 -- Monthly Webinar for FAAs, 2:00 p.m.
- May 31 -- Monthly Webinar for FAAs, 2:00 p.m.
- June 22 -- Commission Meeting
 - More details, including agenda items will be available prior to the meeting at isac.org/about-isac/commissioners/index.html



Questions





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