



FAFSA Update: 2022-23

October 13, 2021

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October 2021



NASFAA Webinar

FAFSA Update: 2022-23

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NASFAA's Webinar Series FAFSA Update: 2022-23

Presented October 13, 2021



Webinar Housekeeping – Welcome!

-  Audio is currently streaming
-  Meet your presenters
-  Submit your questions
-  Download the handouts
-  Print your certificate
-  Complete the survey

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Thank you to our sponsor,
Discover Student Loans

DISCOVER
Student Loans



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Introductions

- **Lissa Powell**
 - *Training Content & Presentation Specialist*
 - *NASFAA*
- **Jackie Cottom**
 - *Training Content Specialist*
 - *NASFAA*
- **Susan Shogren**
 - *Certification and Credentialing Manager*
 - *NASFAA*



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Agenda

- Application Process
- Enhancements and Changes for 2022-23
- Need Analysis Formula Adjustments
- Resources

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Poll Question

What brings you here today?

(check all that apply)

- Prepare for application processing
- Train others in our office/at our school
- Help students and parents complete the FAFSA
- Other

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▶ Application Process



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Filing the FAFSA

-  FAFSA on the Web
-  myStudentAid Mobile App
-  Paper Application
-  FAA Access to CPS Online
-  FAFSA on the Phone

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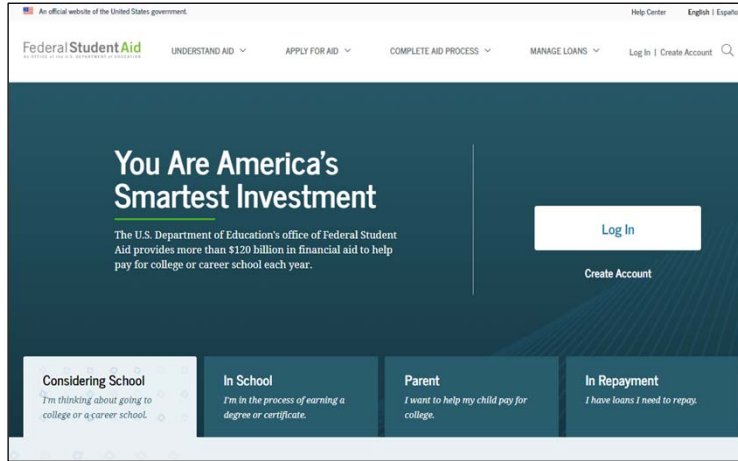


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FAFSA on the Web

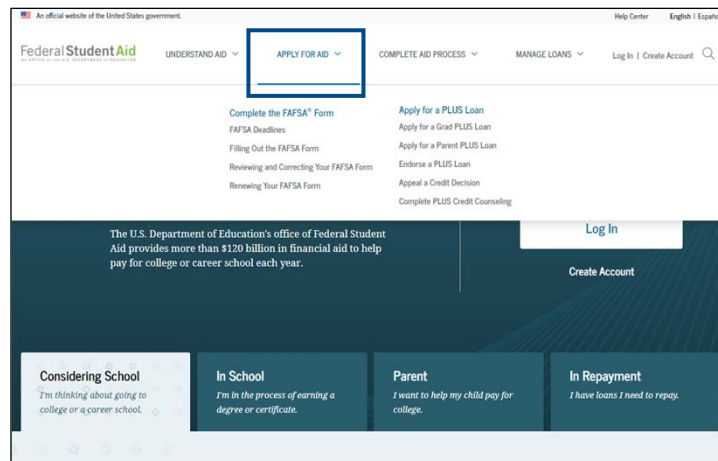


Studentaid.gov

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FAFSA on the Web



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FAFSA on the Web Worksheet

FAFSA on the Web Worksheet

DO NOT MAIL THIS WORKSHEET.

The FAFSA on the Web Worksheet provides a preview of the questions that you may be asked while completing the Free Application for Federal Student Aid (FAFSA) online at fafsa.gov or via the myStudentAid mobile app.

You must complete and submit a FAFSA form to apply for federal student aid and for most state and college aid. Write down notes to help you easily complete your FAFSA form anytime on or after October 1, 2021. See the table to the right for state deadlines. Your application must be submitted by midnight Central time. Also pay attention to the symbols that may be listed after your state deadline. Check with your high school counselor or your college's financial aid administrator about other deadlines. The Federal deadline is June 30, 2023.

- This Worksheet is optional and should only be completed if you plan to use fafsa.gov or the myStudentAid mobile app.
- Sections in purple are for parent information.
- This Worksheet does not include all the questions from the FAFSA form. The questions that are included are ordered as they appear on FAFSA on the Web. When you are online, you may skip to skip some questions based on your answers to earlier questions.

Applying is easier with the IRS Data Retrieval Tool!
Students and parents who have filed their 2020 federal tax return may be able to use the IRS Data Retrieval Tool to easily, accurately and securely transfer their tax information into the FAFSA form.

Sign your FAFSA form with an FSA ID!
For information about the FSA ID, including how to apply, go to StudentAid.gov/fsaid. Your FSA ID allows you to electronically sign your FAFSA form. If you are providing parent information, one parent must also sign your FAFSA form. To sign electronically, your parent should also apply for an FSA ID.

Free help is available!
You do not have to pay to get help or submit your FAFSA form. Submit your FAFSA form free online at fafsa.gov. Federal Student Aid provides free help online at fafsa.gov or you can call 1-800-4-FED-AID (1-800-433-3243).

NOTES:

2022 – 2023 Federal Student Aid

Key attention to every question listed after your state deadline.

FAFSA on the Web Worksheet includes the most commonly asked questions that you may be asked while completing the FAFSA form online at fafsa.gov or via the myStudentAid mobile app.

State Deadlines

State	Deadline
AK	June 30, 2023
AL	June 30, 2023
AR	June 30, 2023
CA	June 30, 2023
CO	June 30, 2023
CT	June 30, 2023
DC	June 30, 2023
DE	June 30, 2023
FL	June 30, 2023
GA	June 30, 2023
IA	June 30, 2023
IL	June 30, 2023
IN	June 30, 2023
KS	June 30, 2023
KY	June 30, 2023
LA	June 30, 2023
MA	June 30, 2023
MD	June 30, 2023
ME	June 30, 2023
MI	June 30, 2023
MN	June 30, 2023
MO	June 30, 2023
MS	June 30, 2023
MT	June 30, 2023
NC	June 30, 2023
ND	June 30, 2023
NH	June 30, 2023
NJ	June 30, 2023
NM	June 30, 2023
NV	June 30, 2023
OH	June 30, 2023
OK	June 30, 2023
OR	June 30, 2023
PA	June 30, 2023
RI	June 30, 2023
SC	June 30, 2023
SD	June 30, 2023
TN	June 30, 2023
TX	June 30, 2023
VA	June 30, 2023
VT	June 30, 2023
WA	June 30, 2023
WI	June 30, 2023
WV	June 30, 2023
WY	June 30, 2023

SECTION 1 - STUDENT INFORMATION

After you are online, you can add up to ten colleges on your FAFSA form. The colleges will receive the information from your processed FAFSA form.

Student's Last Name **First Name** **Social Security Number**

Student Citizenship Status (check one of the following)

U.S. citizen (U.S. national) Neither citizen nor eligible noncitizen

Eligible noncitizen (Enter your Alien Registration Number in the box to the right)

Your Alien Registration Number

Generally, you are an eligible noncitizen if you are:

- A permanent U.S. resident with a Permanent Resident Card (I-151)
- A conditional permanent resident with a Conditional Green Card (I-551C)
- The holder of an Alien Registration Number that has the Department of Homeland Security showing any of the following designations: "Refugee," "Asylum Granted," "Parolee" (in the column provided for a minimum of one year and status has not expired), "T Visa holder" (T, T-1, T-2, etc.), or "T Visa holder Extension of Stay" (in the column of a valid certification or eligibility from the Department of Health and Human Services showing a designation of "Victim of human trafficking")

Student Marital Status (check one of the following)

Single Married or remarried Separated Divorced or widowed

You will be asked to provide information about your spouse if you are married or remarried.

Selective Service Registration

If you are male and 21 or younger, you can use the FAFSA form to register with the Selective Service System.

What is the highest school parent 1 completed?

Middle school or high school College or beyond

High school Other unknown

What is the highest school parent 2 completed?

Middle school or high school College or beyond

High school Other unknown

SECTION 2 - STUDENT DEPENDENCY STATUS

If you can check ANY of the following boxes, you will not have to provide parental information. Skip to page 4. If you check NONE of the following boxes, you will be asked to provide parental information. Go to the next page.

<input type="checkbox"/> I was born before January 1, 1999	<input type="checkbox"/> I am married	<input type="checkbox"/> I will be working on a master's or doctorate program (e.g., MA, MBA, MEd, Ed.S, PhD, EdS graduate certificate)
<input type="checkbox"/> I am serving on active duty in the U.S. Armed Forces	<input type="checkbox"/> I am a veteran of the U.S. Armed Forces	<input type="checkbox"/> I now have or will have children for whom I will provide more than half of their support between July 1, 2022 and June 30, 2023
<input type="checkbox"/> Since turned age 13, both of my parents were deceased	<input type="checkbox"/> I was in foster care since turning age 13	<input type="checkbox"/> I have dependents other than children or my spouse who live with me and provide more than half of their support
<input type="checkbox"/> I was a dependent or ward of the court since turning age 13	<input type="checkbox"/> I am currently or I was an emancipated minor	<input type="checkbox"/> I have dependents or I am at risk of being homeless

NOTES:

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FAFSA on the Web

The screenshot shows the FAFSA website interface. At the top, there are navigation tabs: UNDERSTAND AID, APPLY FOR AID, COMPLETE AID PROCESS, and MANAGE LOANS. Below this, there's a main heading 'Complete the FAFSA Form' with a sub-heading 'Use the Free Application for Federal Student Aid (FAFSA) form to apply for financial aid for college or graduate school.' To the right, there's a section for 'New to the FAFSA Process?' with the text 'Completing the FAFSA form is free. Fill it out now.' and a 'Start Here' button. Below that is a section for 'Returning User?' with the text 'Correct info | Add a school | View your Student Aid Report (SAR)' and a 'Log In' button. At the bottom, there's a section for 'FAFSA Announcements'.

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FAFSA on the Web

STUDENT INFORMATION
Personal Information for Student

Because the FAFSA® form belongs to the student, "you" and "your" always (unless otherwise noted) refer to the student.

Your Social Security Number
---1234

Your First Name
TextE

Your Middle Initial
[]

Your Last Name
Perez

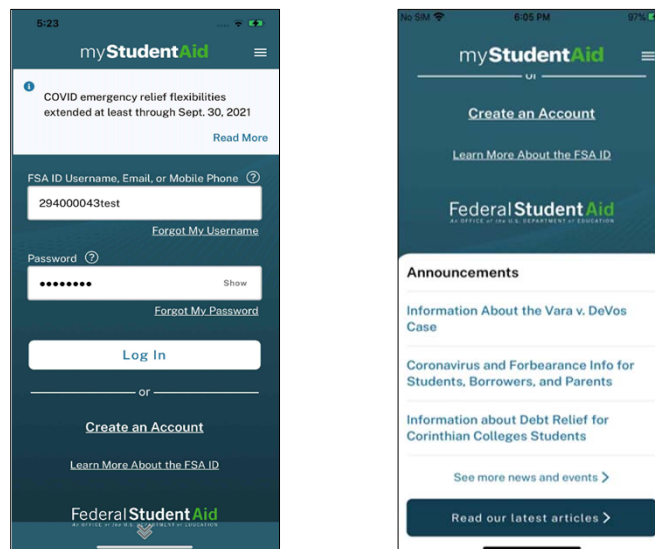
Your Date of Birth
Month: 02 Day: 05 Year: 2001

Previous Continue

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myStudentAid Mobile App



Reference: myStudentAid screenshots provided by U.S. Department of Education (ED)

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Poll

Have you downloaded the myStudentAid app to your device?

- Yes
- No
- I've thought about it

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Paper Application

FAFSA
FREE APPLICATION FOR FEDERAL STUDENT AID

Federal StudentAid
July 1, 2022 - June 30, 2023

Use this form to apply free for federal and state student grants, work-study, and loans.
Or apply free online at fafsa.gov.

Apply by the Deadlines
For federal aid, submit your application as early as possible, but no earlier than October 1, 2021. We will receive your application no later than June 30, 2023. Your college must have your correct, complete information by your last day of enrollment in the 2022-2023 school year.
For state or college aid, the deadline may be as early as October 2021. See the table to the right for state deadlines. You may also need to complete additional forms.
Check with your high school counselor or a financial aid administrator at your college about state and college sources of student aid and deadlines.
If you are bringing in one of these deadlines, we recommend you file either online at fafsa.gov or via the myStudentAid mobile app. These are the fastest and easiest ways to apply for aid.

Use Your Tax Returns
We recommend that you complete and submit your FAFSA Form as soon as possible on or after October 1, 2021. The easiest way to complete or correct your FAFSA Form with accurate tax information is by using the IRS Data Retrieval Tool either through fafsa.gov or the myStudentAid mobile app. In a few simple steps, most students and parents who filed a 2020 tax return can transfer that tax return information directly into their FAFSA Form.
If you or your parents have missed the 2020 tax filing deadline, you may file the 2020 income tax return with the Internal Revenue Service (IRS), you should submit your FAFSA Form now using estimated tax information, and then you must correct that information after you file your return.
Notes: Both parents on both the student and sponsor may need to report income information on the FAFSA Form if they did not file a 2020 tax return for 2020. For assistance with an inquiry, see income information (IRS) on this information page.
1-800-433-3243

Fill Out the FAFSA Form
If you or your family experienced significant changes to your financial situation (such as loss of employment, an illness, or a natural disaster) that affect your ability to complete this form, or if you are an undocumented student, contact your financial aid office at the college you are applying to or plan to attend.
For help in filling out the FAFSA Form, go to StudentAid@nasfaa.org or call 1-800-433-3243.
Fill in the answer fields on the questions or print the form and complete it by hand. Your answers will be read electronically, therefore, if you complete the form by hand, use black ink, and fill bubbles completely. **Correct** **Incorrect**
- print clearly, all caps, letters and digits
- use black ink, and fill bubbles completely
- register dollar amounts (such as \$12,345.41) like this: 12345.41

Mail Your FAFSA Form
After you complete the application, make a copy of pages 3 through 8 for your records. Then mail the original of pages 3 through 8 to:
Federal Student Aid Program, P.O. Box 7828, London, KY 40374-7828
After your application is processed, you will receive a summary of your information in your Student Aid Report (SAR). If you provide an e-mail address, your SAR will be sent by e-mail within three to five days. If you do not provide an e-mail address, your SAR will be mailed to you within three weeks. If you expect the IRS to check the status of your application, go to fafsa.gov or call 1-800-433-3243.

Let's Get Started
Now go to page 3 of the FAFSA Form and begin filling it out. Refer to the notes on pages 9 and 10 as instructed.

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FAA Access to CPS Online

The screenshot shows the top of the website with the header: "Federal Student Aid | FAFSA.gov | FAA Access to CPS Online". Below the header is a navigation bar with "Help" and "FAQs". A main orange banner reads "FAA Access to CPS Online" with a "NEED HELP?" button. The main content area is titled "Welcome to FAA Access to CPS Online!" and includes a list of actions: "View students' SAR information", "Compare two ISIR transactions for the same student", "Submit a signature flag for an application in a signature hold status", "Enter a FAFSA or Renewal FAFSA", "Correct a processed FAFSA", "Continue working on a saved FAFSA or Correction", "Enter Identity Verification Results", and "Request ISIR data". A "SCHEDULED MAINTENANCE" box states that access will be unavailable every Sunday from 3 a.m. to 11 a.m. (Eastern Time). A "NEXT" button is visible at the bottom right of the main content area. The footer contains "Site Last Updated: Sunday, September 12, 2021", "FOIA | Privacy | Security | Notices", "WhiteHouse.gov | USA.gov | ED.gov", and "2010 fafsa.gov. All rights reserved. FAFSA is a trademark of the U.S. Department of Education."

[Faaaccess.ed.gov](https://faaaccess.ed.gov)

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FAA Access to CPS Online

This screenshot is identical to Slide 19, but with a green rectangular box highlighting the "Welcome to FAA Access to CPS Online!" section and a green arrow pointing from the top right towards the box. The rest of the page content, including the header, navigation, and footer, remains the same.

Slide 20 © 2021 NASFAA



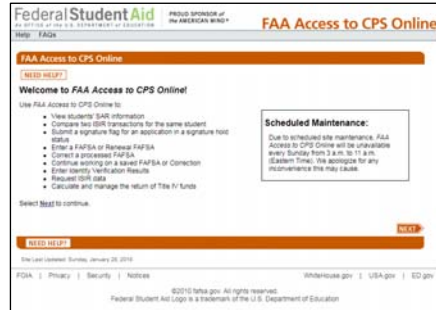


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FAA Access to CPS Online

- Schools must retain all records related to transmission to the CPS
- Demonstration versions of FAA Access to CPS Online and FOTW are available



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Poll

Is FAA Access used in your office to submit a FAFSA on a student's behalf?

- Often
- Rarely
- Not at all

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FAFSA Data Blocks

All students

Student Information

School Selection

Dependency Status

Student Financials

Sign & Submit

Parents of
Dependent Students

Parent Information

Parent Financials

Sign & Submit

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FSA ID

Federal Student Aid UNDERSTAND AID APPLY FOR AID COMPLETE AID PROCESS MANAGE LOANS Log In | Create Account

Welcome to the FAFSA® Form

Tell us about yourself. Help Exit FAFSA Form

- I am a student and want to access the FAFSA form.
- I am a parent filling out a FAFSA form for a student.
- I am a preparer helping a student fill out his or her FAFSA form.

OMB No. 1848-0046 • Form Approved • App. Exp. 8/31/2022

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FSA ID

- Student and parent must each have FSA ID
 - Serves as legal signature
- Parent without SSN cannot obtain FSA ID
 - Must print, sign, and mail paper signature page
- Mobile phone or email address can be associated with only one FSA ID

The screenshot shows the 'Create an Account (FSA ID)' page. It features three icons for 'Parents', 'Students', and 'Borrowers'. Below the icons, it states: 'Whether you're a student, parent, or borrower, you'll need to create your own account to complete federal student aid tasks.' There are two sections: 'What You Can Use Your Account For' and 'Items Needed to Create an Account'. The first section lists: 'Filling out the Free Application for Federal Student Aid (FAFSA®) form', 'Signing your Master Promissory Note (MPN)', 'Applying for repayment plans', 'Completing loan counseling', and 'Using the Public Service Loan Forgiveness Help Tool'. The second section lists: 'Social Security number' and 'Your own mobile phone number and/or email address'. At the bottom, there are buttons for 'Get Started' and 'Log In'.

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IRS Data Retrieval Tool

- Available October 1, 2021 (2022-23 FAFSA)
- Transfer 2020 tax data
- Transferred information remains masked
 - Schools and state agencies can view data
 - "Transferred from the IRS" on FOTW and SAR
 - Student and parent tax values masked with "X" on SAR and SAR Acknowledgement
 - Masking removed if transferred data is changed

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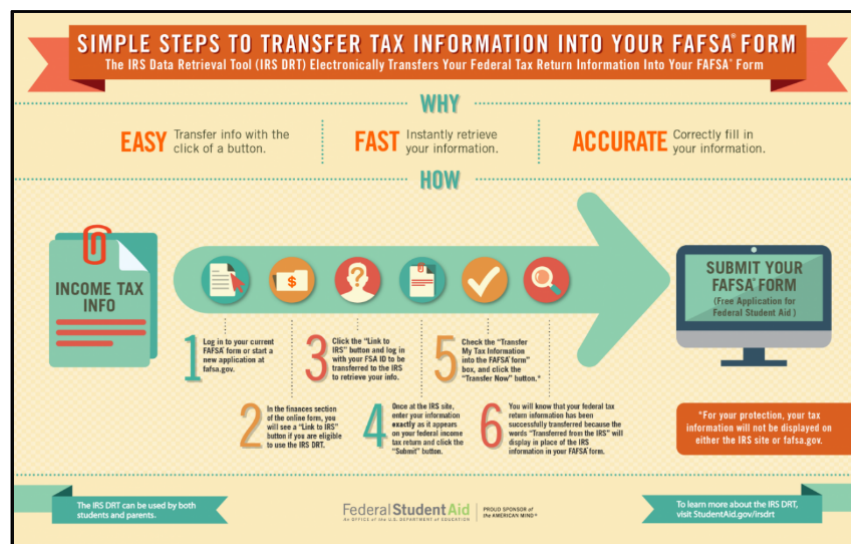
IRS Data Retrieval Tool

- Certain tax filers cannot use the IRS DRT
 - Did not indicate on FAFSA a tax return was completed
 - Marriage date is January 1, 2022, or later
 - First three digits of the SSN are 666
 - Filed a non-U.S. tax return
 - Married and filed as head of household, or filed a separate return
 - Parents are unmarried and living together
 - Neither married parent entered a valid SSN
 - Non-married parent or both married parents entered all zeroes for the SSN

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IRS Data Retrieval Tool



Source: <https://studentaid.gov/sites/default/files/transfer-tax-info-to-fafsa.png>

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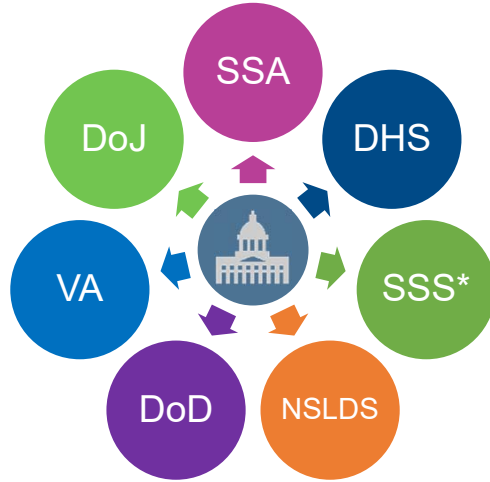




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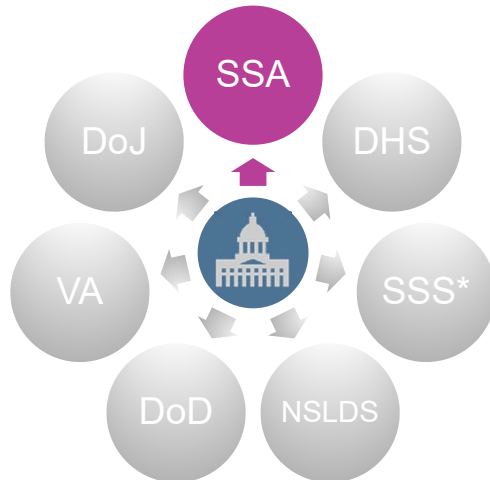
What Happens After Filing?



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What Happens After Filing?



Slide 31 © 2021 NASFAA

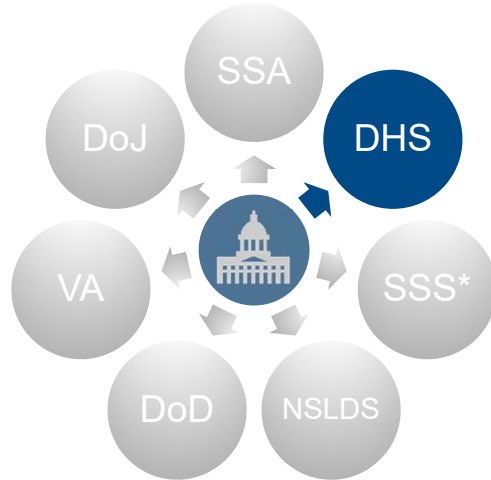




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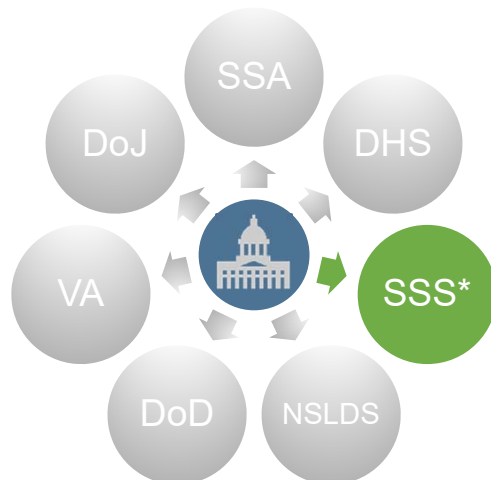
What Happens After Filing?



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What Happens After Filing?



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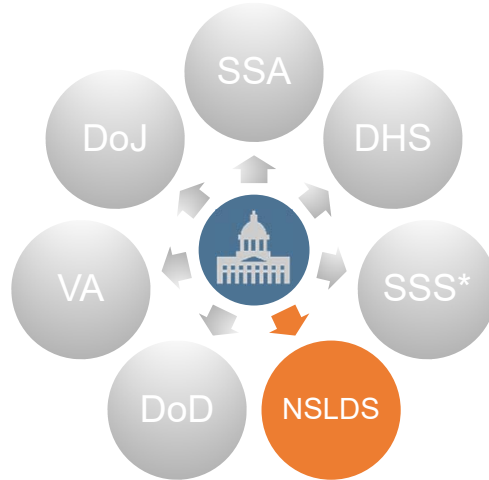




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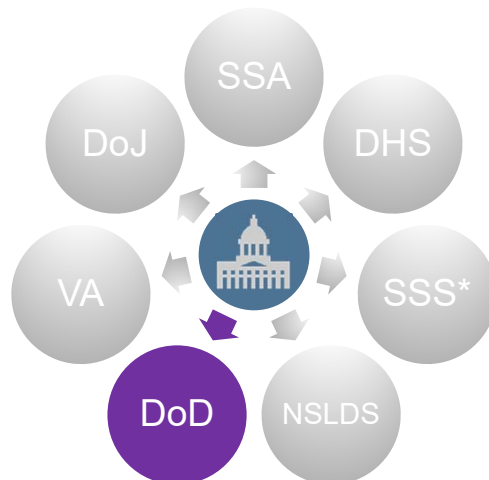
What Happens After Filing?



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What Happens After Filing?



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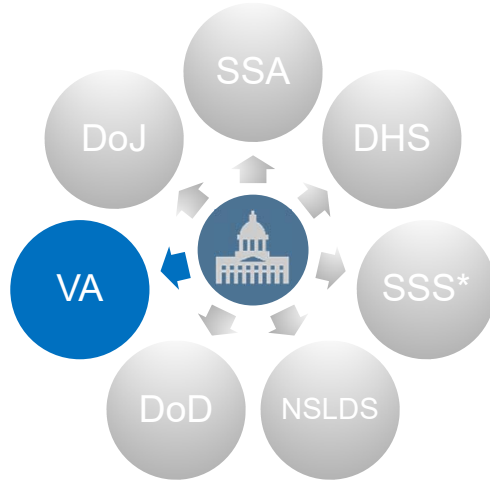




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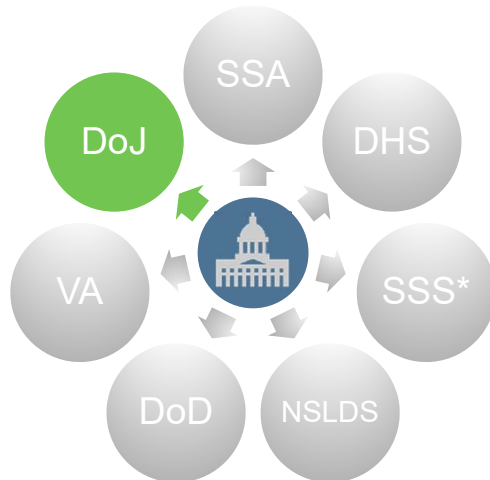
What Happens After Filing?



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What Happens After Filing?



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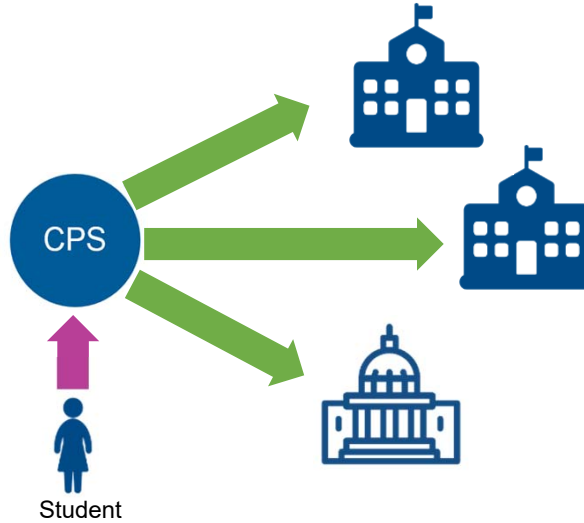




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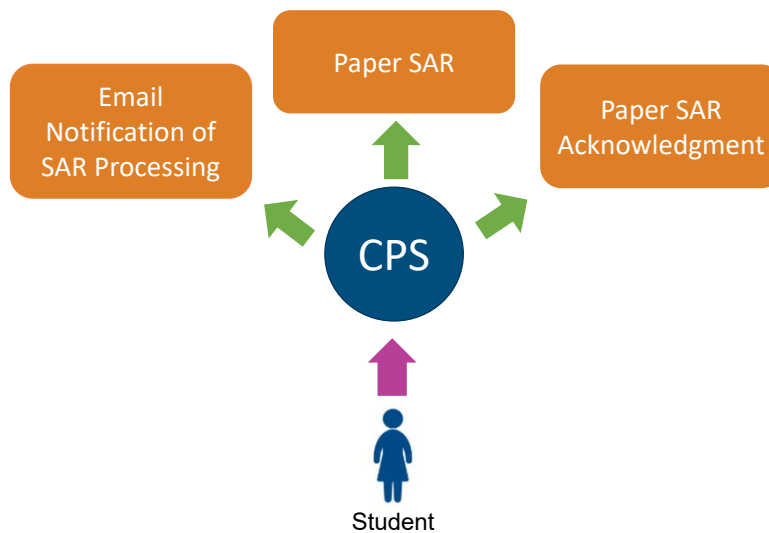
What Happens After Filing?



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What Happens After Filing?



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Viewing the Student Aid Report

- Once SAR has been generated, applicant may select "View Student Aid Report"

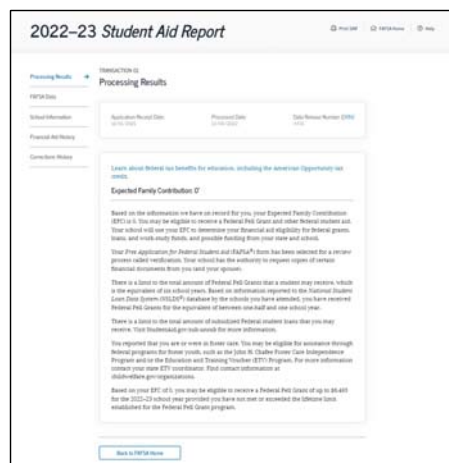
You may take the following additional actions:

 <p>Edit FAFSA Form Change incorrect information on a previous FAFSA submission.</p>	<p>Edit FAFSA Form</p>
 <p>View Student Aid Report View your EFC, FAFSA answers, and financial aid history.</p>	<p>View Student Aid Report</p>

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Viewing the Student Aid Report



2022-23 Student Aid Report

Processing Results

FAFSA Data	Application Received Date	Processed Date	Task Number (SAR)
Submitted	08/18/2021	08/18/2021	1000

Complete Status

Learn about Federal tax benefits for education, including the American Opportunity tax credit.

Expected Family Contribution (EFC)

Based on the information we have collected for you, your Expected Family Contribution (EFC) is 0. You may be eligible to receive a Federal Pell Grant and other Federal student aid. Your school will use your EFC to determine your financial aid eligibility for Federal grants, loans, and work-study funds, and possible funding from your state and school.

Your Free Application for Federal Student Aid (FAFSA®) form has been selected for a certain program called verification. Your school has the authority to request copies of certain financial documents from you and your spouse.

There is a limit to the total amount of Federal Pell Grants that a student may receive, which is the equivalent of six school years. Based on information reported to the Federal Student Loan Data System (FSLDS) database by the schools you have attended, you have received Federal Pell Grants for the equivalent of 0 school years and are eligible for 6.

There is a limit to the total amount of individual Federal student loans that you may receive. Visit StudentAid.gov to see the more information.

You reported that you are or were in foster care. You may be eligible for assistance through Federal programs for foster youth, such as the State or Cluster Foster Care Independence Program and/or the Education and Training Voucher (ETV) Program. For more information contact your state ETV coordinator. Visit www.ed.gov for more information.

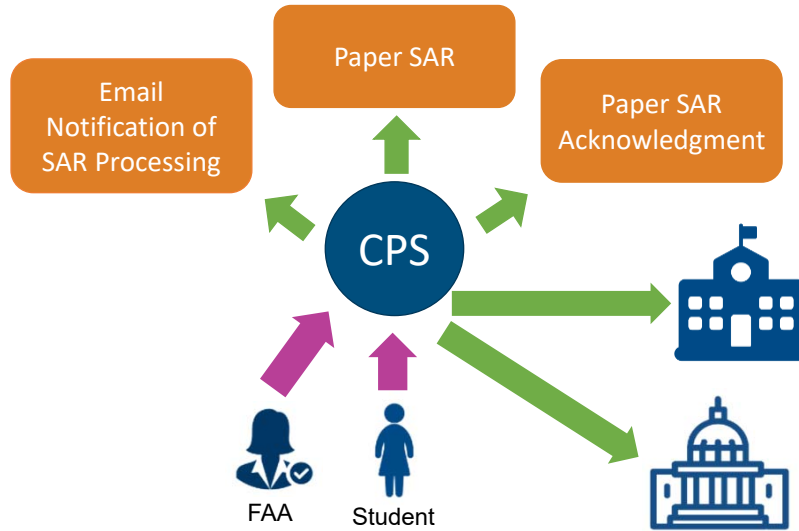
Based on your EFC of 0, you may be eligible to receive a Federal Pell Grant of up to \$6,400 for the 2022-23 school year provided you have not used or exceeded the lifetime loan establisher for the Federal Pell Grant program.

[Back to FAFSA home](#)

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What Happens After Filing?



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Enhancements and Changes for 2022-23



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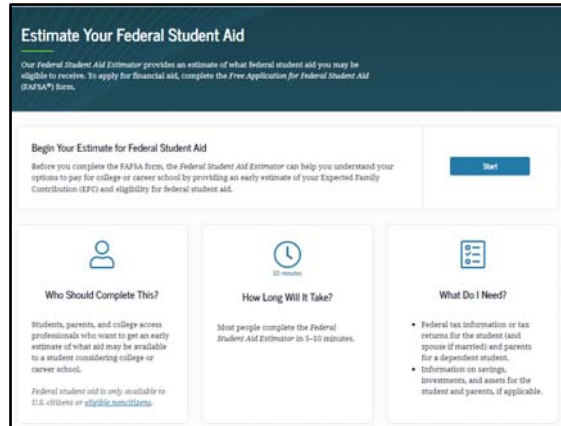


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Federal Student Aid Estimator

- Replaces FAFSA4caster
- Estimates what a student may expect to receive

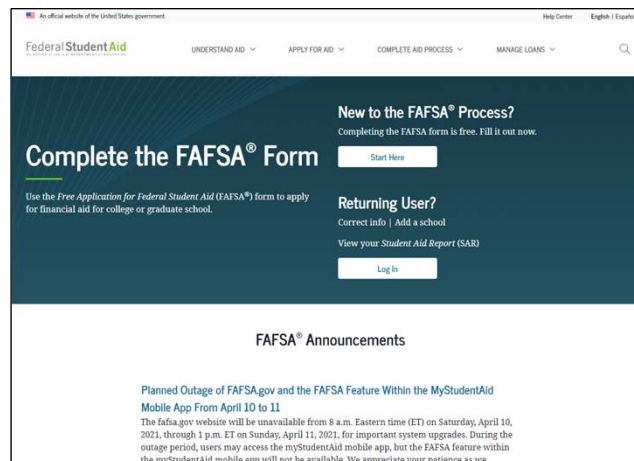


<https://studentaid.gov/aid-estimator/>

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FAFSA on the Web



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Aidan: Virtual Assistant

Welcome to the FAFSA® Form

Tell us about yourself. [Help](#) [Exit FAFSA Form](#)

- I am a student and want to access the FAFSA form.
- I am a parent filling out a FAFSA form for a student.
- I am a preparer helping a student fill out his or her FAFSA form.

Hi there! I'm Aidan®, the financial aid virtual assistant. How can I help you today?

- I need info about my loan payments
- I need help applying for federal aid
- I want my loan and grant info
- I have a different question...

OMB No. 1845-0047 • Form Approved • App. Exp. 8/31/2022

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Aidan: Virtual Assistant

Hi there! I'm Aidan®, the financial aid virtual assistant. How can I help you today?

- I need info about my loan payments
- I need help applying for federal aid
- I want my loan and grant info
- I have a different question...

- Added to studentaid.gov and myStudentAid mobile app

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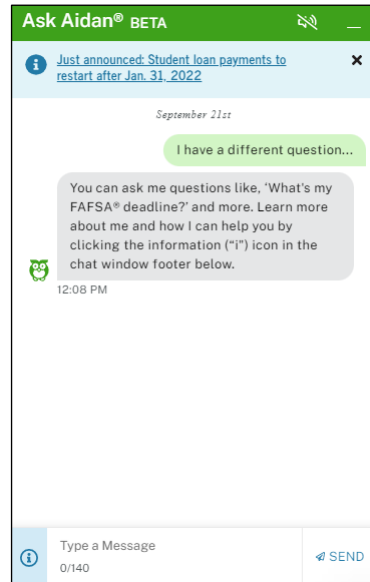




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Aidan: Virtual Assistant



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Selection of Role

Slide 49 © 2021 NASFAA





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Student Selective Service

- Used to determine if user needs to register with SSS
- Does not affect applicant's eligibility for aid

The screenshot shows a progress bar at the top with steps: Student Demographics (checked), School Selection (checked), Dependency Status (checked), Parent Demographics (3), Parent Financials (4), Student Financials (5), and Sign & Submit (7). The current step is 'Student Selective Service' under 'STUDENT INFORMATION'. The form asks: 'Are you male or female?' with radio buttons for 'Male' (selected) and 'Female'. A blue information box states: 'Most male citizens and immigrants must register with the Selective Service System to receive federal student aid.' Below, it asks 'Are you registered with the Selective Service System?' with radio buttons for 'Yes' (selected) and 'No'. At the bottom are 'Previous' and 'Continue' buttons.

Reference: FOTW screenshots provided by U.S. Department of Education (ED)

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Search for High School

- New functionality allows applicant to enter full name, city, and state of high school

The screenshot shows a progress bar at the top with steps: Student Demographics (checked), School Selection (checked), Dependency Status (3), Parent Demographics (4), Parent Financials (5), Student Financials (6), and Sign & Submit (7). The current step is 'Add Your High School Manually' under 'STUDENT INFORMATION'. A blue information box states: 'Please enter the full name, city and state of your high school in the fields below. We'll attempt to match your school information with a school in our database. If we are unable to find a match, the information you provided will be added to your FAFSA® form.' Below are three input fields: 'State / Province / Territory' (a dropdown menu with 'Select' and a note 'My country is not listed'), 'City', and 'Full High School Name'. At the bottom are 'Return to Search' and 'Continue' buttons.

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Parent Data

- New view to guide user to provide correct parent's information

Application was successfully saved.

For additional assistance determining what parent information to report on the FAFSA® form, refer to [Who's my Parent? When Filling Out the FAFSA form!](#) fact sheet.

Since you have been identified as a dependent student, you will need to provide information about your parent(s). You must identify and report information about your parent(s) even if you don't live with him or her. Use the following criteria to determine whose information you should report in the "Parent Demographics" and "Parent Financials" sections of the FAFSA® form:

My parents live together (married or unmarried).

My parents are divorced or separated, and I live with one parent more than the other.

My parents are divorced or separated, and I live with both parents equally.

I was legally adopted.

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Parent Household Information

- Information for parent's dependents

Do not include yourself (the student).

How many other dependent children do your parents have?

Include the other dependent children of your parents if they:

- will rely on your parents for more than half of their financial support between July 1, 2022 and June 30, 2023;
- OR
- can answer "no" to every dependency status question on the FAFSA® form.

How many other dependents do your parents have?

Include your parents' other dependents if they:

- now live with your parents,
- currently receive more than half of their support from your parents,
- and
- will continue to receive more than half of their financial support from your parents between July 1, 2022 and June 30, 2023.

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Parent Household Information

- Household size is calculated based on previous answers

Category	Count
You	1
Your Parents	2
Other Dependent Children of Your Parent(s)	2
Other Dependents of Your Parent(s)	2

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Student Simplified Path Determination

- Schedule 1 question updated to include all exceptions to answering this question

Did you file a Schedule 1? Select No if you did not file a Schedule 1 or only filed a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency. Learn more about Schedule 1.

Transferred from the IRS

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Section Summary

- To review completed section, use selection bar at top

The screenshot shows the FAFSA application progress bar at the top with seven steps: Student Demographics (1), School Selection (2), Dependency Status (3), Parent Demographics (4), Parent Financials (5), Student Financials (6), and Sign & Submit (7). The 'Student Demographics' step is highlighted with a green box. Below the progress bar is the 'STUDENT INFORMATION' section, specifically 'Student Residency and Eligibility'. It contains the question 'Have you lived in New Hampshire for at least 5 years?' with 'Yes' selected. Below that is the question 'Are you a U.S. citizen?' with a dropdown menu showing 'Yes, I am a U.S. citizen (or U.S. national)'. At the bottom are 'Previous' and 'Continue' buttons.

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FAFSA Summary

- Use hyperlinks to access specific question

The screenshot shows the FAFSA summary page with two columns of questions and answers. The left column is titled 'Student Demographics' and the right column is titled 'Type of Degree/Certificate (question 20)'. The questions and answers are as follows:

Question	Answer
Student's Social Security Number (question 8)	---
Student's First Name (question 2), Student's Middle Initial (question 3)	INDEPENDENT
Student's Last Name (question 1)	TESTER
Student's Date of Birth (question 9)	01/01/1990
Student's Email Address (question 13)	test@7213017@net.com
Student's Telephone Number (question 10)	
Student's Permanent Mailing Address (question 4)	1000 TEST AVE
Student's Permanent City (question 5)	LAWTOWN
Student's Permanent State (question 6), Student's Permanent ZIP Code (question 7)	ALABAMA 35000
Has the student lived in more than one state in the past 5 years?	No
Student's State of Legal Residence (question 12)	Alabama
Was the student a legal resident before January 1, 2020? (question 18)	Yes
When did the student become a resident of the state? (question 20)	
Student's Citizenship Status (question 14)	Yes, I am a U.S. citizen (or U.S. national)
Student's Alien Registration Number (question 15)	
Has the student completed high school or an equivalent? (question 25)	High school diploma
Type of Degree/Certificate (question 20)	1st bachelor's degree
Did the student complete his or her first bachelor's degree before 2021-22 school year? (question 28)	No
Student's Grade Level in College in 2021-22 (question 29)	4th yr./senior
Is the student interested in Work Study? (question 31)	Yes
Is the student male or female? (question 21)	Male
Does the student want to register with the Selective Service System? (question 22)	
Student's Driver's License Number (question 11)	
Student's Driver's License State (question 12)	
Is the student in foster care?	No
Parent 1 Educational Level (question 24)	College or beyond
Parent 2 Educational Level (question 25)	College or beyond
Does the student have a drug conviction affecting his or her eligibility? (question 23)	Eligible for aid
Student Aid Eligibility Worksheet	
Has the student received federal student aid?	Yes

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Sign and Submit

- Preparer option only displayed if that role was chosen when logging into application
- If user in parent role, parent signature presented first, then student

The screenshot shows the 'Sign & Submit' page in the FAFSA application. The navigation bar at the top includes: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials, and Sign & Submit. The main content area is titled 'SIGN & SUBMIT' and 'Signature Options'. It shows 'Parent Signature for: Perez' with fields for Date of Birth (02/27/2008) and Social Security Number (---1234). Below this is a section for 'Enter the parent's FSA ID' with instructions: 'Do not enter the FSA ID if you are not the parent.' It includes a text input for 'Parent's FSA ID Username, Email Address, or Mobile Number' with a 'Forgot Username' link and a 'Create an FSA ID' button. There is also a password field for 'Parent's FSA ID Password' with a 'Show' button and a 'Forgot Password' link. A blue 'Sign This FAFSA Form' button is at the bottom. At the very bottom, there are links for 'Return to Signature Status' and 'Other Options to Sign and Submit'.

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Adding a School

- In correction entry, user may select “Update List of Colleges” to add or remove schools without signing the correction

The screenshot shows the 'SCHOOL SELECTION' page in the FAFSA application. The navigation bar at the top includes: Student Demographics, School Selection, Dependency Status, Parent Demographics, Parent Financials, Student Financials, and Sign & Submit. The main content area is titled 'SCHOOL SELECTION' and 'College Search'. It contains three numbered instructions: 1. 'VERIFY: based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.' 2. 'Have a where you'll search for the colleges to which you'd like to send your FAFSA® information. You can add up to 10 colleges at a time to your FAFSA Search. Select what to do if you're applying to more than 10 colleges. Make sure you add ALL colleges you're interested in, even if you haven't applied or been accepted yet.' 3. 'Enter the college's school code and select "Search."' Below the instructions are two search options: 'Search by School Name, City, State' and 'Search by Federal School Code'. The 'Search by Federal School Code' option is selected, showing a text input for 'Federal School Code' and a blue 'Search' button. A 'Previous' button is at the bottom left.

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Paper FAFSA

- Questions 22 and 23 edited

22. If female, skip to question 23. Most male students must register with the Selective Service System. If you are male, are age 18-25, and have not registered, fill in the circle and we will register you. See Notes page 9. Register me

23. Have you been convicted for the possession or sale of illegal drugs for an offense that occurred while you were receiving federal student aid (such as grants, work-study, or loans)?
Answer "No" if you have never received federal student aid or if you have never had a drug conviction for an offense that occurred while receiving federal student aid. If you have a drug conviction for an offense that occurred while you were receiving federal student aid, answer "Yes." A recently passed law means that you are now eligible for federal student aid even if you have been convicted for the sale or possession of illegal drugs while receiving federal student aid. No further action is required. No Yes

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► Need Analysis Formula Adjustments



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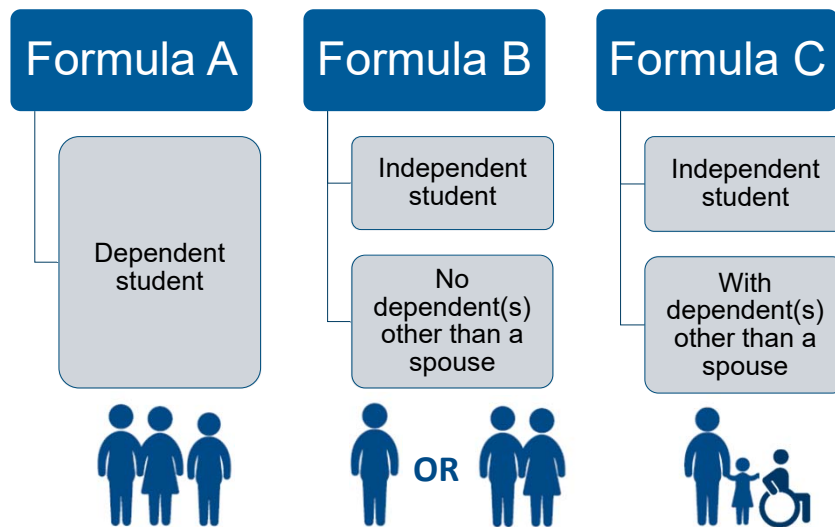
2022-23 EFC Calculations

- *Federal Register*, July 19, 2021
- Secretary must annually update four tables:
 - Income Protection Allowance (IPA)
 - Adjusted Net Worth of Business or Farm
 - Education Savings and Asset Protection Allowance
 - Assessment Schedules and Rates
- Updates based on Consumer Price Index
- No change to threshold for automatic zero EFC
- *2022-23 EFC Formula Guide*, August 25, 2021

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Regular Formula



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Poll

Have you ever calculated a student's expected family contribution (EFC) using a regular or simplified formula worksheet?

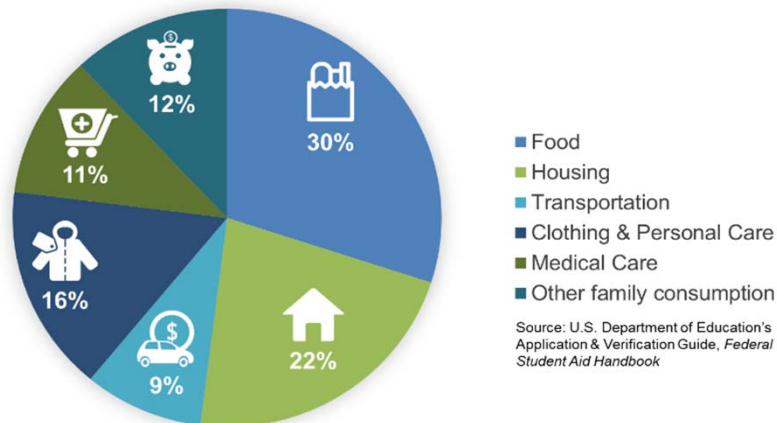
- Yes
- No

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Income Protection Allowance

- IPA protects a portion of a family's income associated with basic living expenses



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Income Protection Allowance

2021-22 IPA

Example:
Household size of 4
2 in college
IPA = \$26,570

Table 4: Income Protection Allowance

Number in parents' household, including student (FAFSA/SAR #72)	EFC Formula A Number of college students in the household (FAFSA/SAR #73)				
	1	2	3	4	5
2	\$19,440	\$16,110	not applicable	not applicable	not applicable
3	\$24,200	\$20,900	\$17,570	not applicable	not applicable
4	\$29,890	\$26,570	\$23,260	\$19,930	not applicable
5	\$35,270	\$31,940	\$28,640	\$25,310	\$22,000
6	\$41,250	\$37,930	\$34,620	\$31,300	\$27,990

Note: For each additional household member, add \$4,660.
For each additional college student (except parents), subtract \$3,310.

2022-23 IPA

Example:
Household size of 4
2 in college
IPA = \$26,830

Table 4: Income Protection Allowance

Number in parents' household, including student (FAFSA/SAR #72)	EFC Formula A Number of college students in the household (FAFSA/SAR #73)				
	1	2	3	4	5
2	\$19,630	\$16,270	not applicable	not applicable	not applicable
3	\$24,440	\$21,100	\$17,740	not applicable	not applicable
4	\$30,190	\$26,830	\$23,490	\$20,130	not applicable
5	\$35,620	\$32,260	\$28,920	\$25,560	\$22,220
6	\$41,670	\$38,310	\$34,970	\$31,610	\$28,270

Note: For each additional household member, add \$4,700.
For each additional college student (except parents), subtract \$3,340.

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Adjusted Net Worth of Business/Farm

- Slight increase in the amount of asset's value taken into consideration in calculation
- More of the asset's value is protected

2021-22

Table 6: Business/Farm Net Worth Adjustment

EFC Formulas A (parents only), B, and C	
If the net worth of a business or farm is—	Then the adjusted net worth is—
Less than \$1	\$0
\$1 to \$140,000	40% of net worth of business/farm
\$140,001 to \$415,000	\$56,000 + 50% of net worth over \$140,000
\$415,001 to \$695,000	\$193,500 + 60% of net worth over \$415,000
\$695,001 or more	\$361,500 + 100% of net worth over \$695,000

2022-23

Table 6: Business/Farm Net Worth Adjustment

EFC Formulas A (parents only), B, and C	
If the net worth of a business or farm is—	Then the adjusted net worth is—
Less than \$1	\$0
\$1 to \$140,000	40% of net worth of business/farm
\$140,001 to \$420,000	\$56,000 + 50% of net worth over \$140,000
\$420,001 to \$700,000	\$196,000 + 60% of net worth over \$420,000
\$700,001 or more	\$364,000 + 100% of net worth over \$700,000

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Education Savings and Asset Protection Allowance

- Allowance protects portion of assets in the EFC calculation
- Three asset protection allowances:
 - Parents of dependent students
 - Independent students without dependents other than a spouse
 - Independent students with dependents other than a spouse
- Amount protected in calculation decreased for 2022-23

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Education Savings and Asset Protection Allowance

Age as of 12/31/2021	Allowance for two parents or married student	Allowance for one parent or unmarried student	Age as of 12/31/2021	Allowance for two parents or married student	Allowance for one parent or unmarried student
25 or less	\$0	\$0	46	\$6,300	\$2,400
26	400	100	47	6,500	2,500
27	700	300	48	6,600	2,500
28	1,100	400	49	6,800	2,600
29	1,500	600	50	7,000	2,700
30	1,800	700	51	7,100	2,700
31	2,200	800	52	7,300	2,800

2021-22

Age as of 12/31/2022	Allowance for two parents or married student	Allowance for one parent or unmarried student	Age as of 12/31/2022	Allowance for two parents or married student	Allowance for one parent or unmarried student
25 or less	\$0	\$0	46	\$3,600	\$0
26	200	0	47	3,700	0
27	400	0	48	3,700	0
28	600	0	49	3,800	0
29	800	0	50	3,900	0
30	1,000	0	51	4,000	0
31	1,200	0	52	4,100	0

2022-23

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Assessment Schedules and Rates

- Amount of family resources that could be used for educational expenses
- Adjusted available income (AAI) based on income combined with contribution from assets

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Adjusted Available Income

EFC Formula A – Parents' Contribution from AAI
EFC Formula C – Student's Contribution from AAI

2021-22

If the AAI is —	Then the contribution from AAI is—
Less than -\$3,409	-\$750
-\$3,409 to \$17,400	22% of AAI
\$17,401 to \$21,800	\$3,828 + 25% of AAI over \$17,400
\$21,801 to \$26,200	\$4,928 + 29% of AAI over \$21,800
\$26,201 to \$30,700	\$6,204 + 34% of AAI over \$26,200
\$30,701 to \$35,100	\$7,734 + 40% of AAI over \$30,700
\$35,101 or more	\$9,494 + 47% of AAI over \$35,100

2022-23

EFC Formula A – Parents' Contribution from AAI
EFC Formula C – Student's Contribution from AAI

If the AAI is —	Then the contribution from AAI is—
Less than -\$3,409	-\$750
-\$3,409 to \$17,500	22% of AAI
\$17,501 to \$22,000	\$3,850 + 25% of AAI over \$17,500
\$22,001 to \$26,500	\$4,975 + 29% of AAI over \$22,000
\$26,501 to \$31,000	\$6,280 + 34% of AAI over \$26,500
\$31,001 to \$35,500	\$7,810 + 40% of AAI over \$31,000
\$35,501 or more	\$9,610 + 47% of AAI over \$35,500

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► Resources



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FAFSA Resources

- FAFSA for 2022-23 applicants
 - FAFSA on the Web
 - myStudentAid mobile app
 - FAFSA in PDF
 - FAFSA on the Web Worksheet (PDF)
- StudentAid.gov

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FAFSA Videos

- Federal Student Aid (studentaid.gov/resources)
 - ▶ Financial Aid Process
 - ▶ How to Create Your FSA ID
 - ▶ FAFSA Overview
 - ▶ How to Fill Out the FAFSA
 - ▶ FAFSA and FSA ID Tips for Parents
 - ▶ FAFSA: Determining Dependency Status
 - ▶ After the FAFSA: What Happens Next

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FAFSA Infographics

- Federal Student Aid (studentaid.gov/resources)
 - 📄 Financial Aid Process
 - 📄 Eligibility for Federal Student Aid
 - 📄 Types of Federal Student Aid
 - 📄 The FAFSA Process
 - 📄 FAFSA Dependency Status
 - 📄 Who's My Parent When I Fill Out My FAFSA?
 - 📄 Simple Steps to Transfer Tax Information Into Your FAFSA® Form
 - 📄 After the FAFSA: What Happens Next

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FAFSA Resources

- Financial aid administrators
 - Federal Register Notice: Federal Need Analysis Methodology
 - ISIR Guide
 - SAR Comment Codes and Text
 - EFC Formula Guide
 - FSA Handbook Application and Verification Guide
 - FAFSA Preview Presentation
 - Demo site (FOTW and FAA Access to CPS Online)
 - fafsademo.test.ed.gov
 - September 26, 2021

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FAFSA Resources

- System updates
 - Summary of Changes for the Application Processing System (August 31, 2021)
 - Application Processing System Specifications for Software Developers (July 19, 2021)
 - CPS Test System User Guide
 - EDEXpress Packaging Technical Reference
 - Application and ISIR Test Files and Comment Code Text

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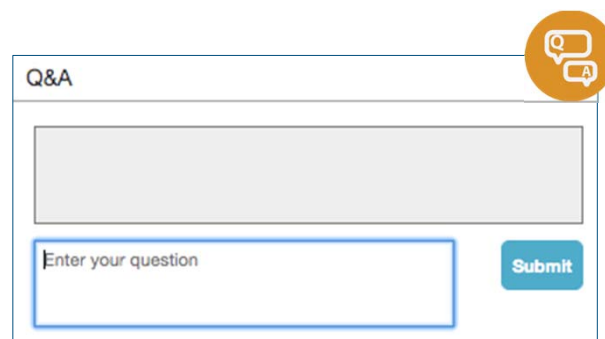
Training Opportunities

- FSA training and updates
 - FSA Training Conference (virtual)
 - <https://fsaconferences.ed.gov/>
 - November 30 – December 3, 2021
 - Follow @FSACConf and #FSATC2021
 - FSATraining.ed.gov
 - Virtual and online workshops
- NASFAA
 - Financial Aid Night Presentations (member benefit)
 - *Completing the FAFSA via Mobile App* video
 - <https://www.youtube.com/watch?v=-OBzFyFooYE>
 - Fundamentals of Student Financial Aid NASFAA U course
 - January 11, 2022

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Submit Your Questions



Q&A

Enter your question

Submit

The form consists of a header 'Q&A' with a question and answer icon, a large grey text area, a smaller input field with the placeholder 'Enter your question', and a blue 'Submit' button.

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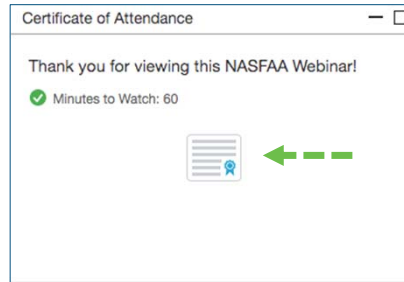


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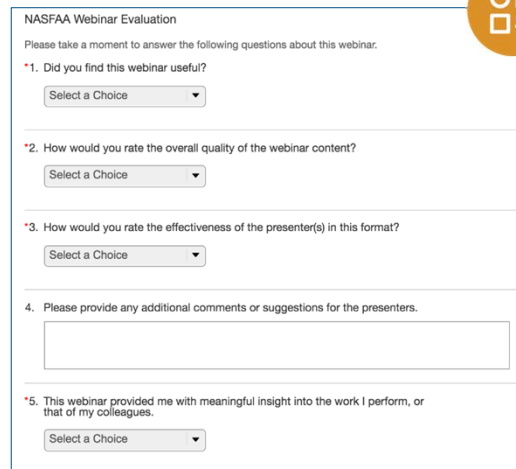
Download Your Certificate of Attendance



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Complete the Survey



NASFAA Webinar Evaluation

Please take a moment to answer the following questions about this webinar.

*1. Did you find this webinar useful?

*2. How would you rate the overall quality of the webinar content?

*3. How would you rate the effectiveness of the presenter(s) in this format?

4. Please provide any additional comments or suggestions for the presenters.

*5. This webinar provided me with meaningful insight into the work I perform, or that of my colleagues.



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Tune In Next Time:

Verification and Challenging Issues: 2022-23 (Extended Version)

October 27, 2021

2:00 p.m. ET

Making the Jump from Financial Aid to Enrollment Management

November 2, 2021

2:00 p.m. ET



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Certified Financial Aid Administrator® Program 2021-22 Testing Windows

September 15-29, 2021

October 27-November 10, 2021

December 1-15, 2021

January 5-26, 2022

Schedule your exam today
and become a certified FAA!



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Coming Up Next:

Higher Education Loans Certificate – 10/19/21

Registration Now Open for 2021-22:

- Professional Judgment – 11/8/21
- Return of Title IV Funds – 1/10/22
- Fundamentals of Student Financial Aid – 1/11/22
- Verification 2022-23 – 2/14/22
- Cash Management – 3/15/22
- Student Eligibility – 4/11/22
- Application Processing – 5/10/22
- Fundamentals of Student Financial Aid – 7/5/22



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The advertisement features a smiling woman in a grey sweater looking at a laptop displaying a website. In the top left corner is the Student Aid Reference Desk logo, which includes an icon of an open book with a graduation cap and a lightbulb. The text 'Student Aid Reference Desk™' is in green. The slogan 'Find it Fast.' is in blue and red. At the bottom, a dark blue button contains the website address 'studentaidrefdesk.org' in white.

Student Aid Reference Desk™

Find it
Fast.

studentaidrefdesk.org



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FAFSA Update: 2022-23
Presented October 13, 2021

Thank you for
joining us!

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FAFSA: 2022-23 References and Resources

FAFSA Processing Resources for Financial Aid Administrators

Federal Register Notice: Federal Need Analysis Methodology for the 2022-23 Award Year (July 19, 2021)
<https://fsapartners.ed.gov/knowledge-center/library/federal-registers/2021-07-19/federal-need-analysis-methodology-award-year-ay-2022-23>

2022-23 Free Application for Federal Student Aid
<https://studentaid.gov/resources#fafsa>

2022-23 FAFSA on the Web Worksheet
<https://studentaid.gov/sites/default/files/2022-23-fafsa-worksheet.pdf>

2022-23 Application Processing System Specifications for Software Developers (July 2021 Draft)
<https://fsapartners.ed.gov/sites/default/files/2021-07/2223SWDevSpecs.pdf>

2022-23 EDE Technical Reference (June 16, 2021)
<https://fsapartners.ed.gov/sites/default/files/2021-06/2223EDETechRefFinal.pdf>

2022-23 CPS Test System User Guide (June 28, 2021)
<https://fsapartners.ed.gov/knowledge-center/topics/2022-2023-cps-test-system>

2022-23 ISIR Guide (July 12, 2021)
<https://fsapartners.ed.gov/sites/default/files/2021-07/2223ISIRGuide.pdf>

2022-23 SAR Comment Codes and Text (September 9, 2021)
<https://fsapartners.ed.gov/sites/default/files/2021-08/2223SARCommentCodesandText.pdf>

2022-23 EFC Formula Guide (August 25, 2021)
<https://fsapartners.ed.gov/sites/default/files/2021-08/2223EFCFormulaGuide.pdf>

2022-23 Summary of Changes for the Application Processing System (August 18, 2021)
<https://fsapartners.ed.gov/sites/default/files/2021-08/2223SumChangesAppProcessSysGuide.pdf>

Electronic Announcement, August 31, 2021: 2022-23 FAFSA Form on StudentAid.gov Preview Presentation
<https://fsapartners.ed.gov/sites/default/files/2021-08/202223fafsaformpreviewpresentation.pptx>

Electronic Announcement, August 31, 2021: 2022-23 FAFSA Mobile App Preview Presentation
<https://fsapartners.ed.gov/sites/default/files/2021-08/202223fafsamobilepreviewpresentation.pptx>

Electronic Announcement, 09/16/21: 2022-23 Application and ISIR Test Files and 2022-23 Comment Code Text
<https://fsapartners.ed.gov/knowledge-center/library/electronic-announcements/2021-09-16/2022-23-application-and-isir-test-files-and-2022-23-comment-code-text>

FAA Access to CPS Online and FAFSA on the Web demonstration website:

<http://fafsademo.test.ed.gov>

Username: eddemo

Password: fafsatest

Federal Student Aid infographics, videos, booklets, brochures, and graphics

<https://studentaid.gov/resources>

NASFAA Resources (member benefits)

2022-23 Financial Aid Night Event Kit

https://www.nasfaa.org/Financial_Aid_Night_Presentation

FAFSA Application and Resources for Students and Parents

FAFSA on the Web (2022-23 available as of October 1, 2021)

<https://studentaid.gov/h/apply-for-aid/fafsa>

myStudentAid mobile app (2022-23 available as of October 1, 2021)

[App Store](#) (iOS)

[Google Play](#) (Android)

FAFSA FAQs

<https://studentaid.gov/apply-for-aid/fafsa/filling-out/help>

Federal Student Aid Estimator

<https://studentaid.gov/aid-estimator/>

FSA Resources (videos, infographics, FAQs, and more)

<https://studentaid.gov/resources>

Federal Student Aid Information Center (alternative FAFSA filing and problem resolution)

<https://studentaidhelp.ed.gov/app/home/site/studentaid>

1-800-4-FED-AID (1-800-433-3243)

1-800-730-8913 (TTY for the deaf or hard of hearing)

E-mail: studentaid@ed.gov

Live online chat available

Create a New FSA ID

<https://studentaid.gov/fsa-id/sign-in/landing>

NASFAA Resources for Students and Parents

https://www.nasfaa.org/students_parents



Changes to Federal Methodology and the Pell Grant Program, 2021+

Note: For changes made before 2021, please reference the [Legislative Changes to Federal Methodology and the Pell Grant Program, 2006-2021 chart](#).

Effective Date ¹	Legislation	HEA Citation	Change	Comment
7/1/2021	Consolidated Appropriations Act, 2021	401(b)	Includes funds to establish the maximum Federal Pell Grant award for the 2021-22 Award Year at \$5,435. With the mandatory increase based on the Consumer Price Index (CPI), the maximum award is \$6,495.	HEA section 401(b)(7)(C)(iii) provides for an automatic mandatory increase to the appropriated Federal Pell Grant maximum award for 2021-22 of \$1,060, resulting in a 2021-22 maximum award of \$6,495.
7/1/2023	Consolidated Appropriations Act, 2021	484(t)(3)	Restores Pell Grant eligibility for incarcerated individuals enrolled in a Prison Education program.	ED is authorized to early implement before July 1, 2023. If it does so, ED must specify on what date, under what conditions, and for which award years it will early implement in the Federal Register at least 60 days before implementation.
7/1/2023	Consolidated Appropriations Act, 2021	401(b)(1)(A) 401(c)(2)	Updates applicants who are eligible for the maximum Pell Grant award: <ul style="list-style-type: none"> • Independent student (and spouse, if applicable) tax non-filers. • Dependent children of nonfiling parent(s) • Students under age 33 whose parent died serving in the armed forces after Sept. 11, 2001 and are otherwise eligible to receive a Pell Grant. • Students under age 33 whose parent died in the line of duty as a public safety officer and are otherwise eligible to receive a Pell Grant. • Independent students who are single parents and whose student AGI is below 225% of the poverty level. • Dependent children of a single parent whose parent AGI is below 225% of the poverty level. 	The federal poverty level takes into account household size. The federal poverty level for the prior-year is used, to correspond with the income years used on the FAFSA.

¹ While the Consolidated Appropriations Act, 2021 has an effective date of July 1, 2023, subsequent Department of Education [guidance](#) has delayed changes to Federal Methodology until July 1, 2024.

Effective Date ¹	Legislation	HEA Citation	Change	Comment
(continued)			<ul style="list-style-type: none"> Independent students who are not single parents whose student AGI is below 175% of the poverty level. Dependent students with parents who are not single parents whose parent AGI is below 175% of the poverty level. 	
7/1/2023	Consolidated Appropriations Act, 2021	473(b)&(c)	<ul style="list-style-type: none"> Applicants eligible for the maximum Pell Grant, except those who receive the maximum Pell Grant because they are the child of a parent who died serving in the armed forces after Sept. 11, 2001 or in the line of duty as a public safety officer would have an automatic Student Aid Index (SAI) of \$0, unless their calculated SAI was a negative number, in which case the negative number would be used as the SAI. Tax non filers would have an SAI of -\$1,500. 	
7/1/2023	Consolidated Appropriations Act, 2021	401(b)(1)(A)&(C)	Minimum and maximum Pell Grant award amounts are based on the number of parents in the household, and family income as a percentage of the federal poverty level for the applicant's household size.	
7/1/2023	Consolidated Appropriations Act, 2021	401(b)(1)(B)	Students who are not eligible for the maximum or minimum Pell awards are eligible for a Pell award in the amount of the maximum Pell award for the award year less the SAI, rounded to the nearest \$5, not to fall below the minimum Pell award of 10% of the annual maximum award amount.	In cases of negative SAI, the SAI will be treated as 0 for calculating the Pell award.
7/1/2023	Consolidated Appropriations Act, 2021	401(b)(1)(C)	Allows those not eligible for maximum Pell or alternate Pell award amount calculation to receive the minimum Pell award amount if: <ul style="list-style-type: none"> For a dependent applicant; their parent is single and their AGI is less than 325% of the federal poverty level. For a dependent applicant; their parents are married and their AGI is less than 275% of the federal poverty level. For an independent applicant; they are a single parent and their AGI is less than 400% of the federal poverty level. 	

Effective Date ¹	Legislation	HEA Citation	Change	Comment
(continued)			<ul style="list-style-type: none"> For an independent applicant, they are married and have dependents and their AGI is less than 350% of the federal poverty level. For an independent applicant, they do not have dependents and their AGI is less than 275% of the federal poverty level. 	
7/1/2023	Consolidated Appropriations Act, 2021	401(b)(2)	Maintains the Pell minimum award at 10% of maximum but allows less-than-full-time students to receive a prorated award amount that is less than the minimum Pell award of 10% of the maximum award.	Less-than-full time students could receive an award equal to the full-time award amount multiplied by their enrollment intensity as a percentage of full time, even if that award amount was less than the Pell award amount floor of 10% of the maximum Pell award.
7/1/2023	Consolidated Appropriations Act, 2021	401(h)(1) & (2)	<p>Allows for Pell appropriations that exceed the amount needed to make payments by less than 15% to be available for next award year.</p> <p>Allows for Pell appropriations that are in excess of 15% of the amount needed to make payments for that award year, to remain available but payments may be made only for entitlements for that fiscal year.</p>	
7/1/2023	Consolidated Appropriations Act, 2021	475(c)(3) 475(g)(2)(c) 476(b)(1)(A)(iii) 477(b)(3)	Updates Income Protection Allowance (IPA) tables to account for only family size instead of both family size and number in college.	IPAs for both dependent students and their parents as well as independent students are significantly increased. An automatic annual inflationary increase still remains.
7/1/2023	Consolidated Appropriations Act, 2021	480(b)(5)	Adds back to total income any foreign income that was exempt from U.S. tax or for which a foreign tax credit was received.	Previously such foreign income was not counted in the Federal Methodology.
7/1/2023	Consolidated Appropriations Act, 2021	475(c)(1) 476(b)(1) 477(b)(1)	Removes the state and other tax income allowance.	
7/1/2023	Consolidated Appropriations Act, 2021	480(f)(1)	Removes the family farm and small business asset exclusions.	Families would have to report the net value of any business or farm they own if they did not qualify for the simplified formula that excludes assets from consideration.

Effective Date ¹	Legislation	HEA Citation	Change	Comment
7/1/2023	Consolidated Appropriations Act, 2021	480(f)(1)	Updates the definition of assets to include child support received.	If applicable, child support received is only reported by those applicants who do not qualify for the simplified formula.
7/1/2023	Consolidated Appropriations Act, 2021	480(b)(1)	<p>Updates the definition of untaxed income to only include items that are delineated on the federal tax return which are:</p> <ul style="list-style-type: none"> • Deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified individual retirement accounts excluded from income for Federal tax purposes. • Tax-exempt interest income. • Untaxed portion of individual retirement account distributions. • Untaxed portions of pensions. • Foreign income of permanent residents of the U.S. or U.S. citizens exempt from Federal taxation or foreign income for which a foreign tax credit is received. 	<p>The follow item is not included in the definition of untaxed income and benefits:</p> <ul style="list-style-type: none"> • Payments made to tax-deferred pension and retirement plans, which were paid directly or withheld from earnings, that are not delineated on the Federal tax return. • Housing, food and other living allowances paid to members of the military, clergy and others • Veterans non-education benefits. • Other untaxed income, such as worker's compensation, disability benefits, untaxed foreign income. • Money received or paid on the parent or student's behalf. <p><i>Child support was removed from this definition and is now considered under assets.</i></p>
7/1/2023	Consolidated Appropriations Act, 2021	480(e)	<p>Updates the definition of excludable income to mean:</p> <ul style="list-style-type: none"> • An amount equal to the education credits received (American Opportunity Tax Credits; Lifetime Learning Credit). • If reported, college and grant scholarship aid included in the gross income on the tax return; includes amounts received through fellowship or assistantships, and any national service educational award, or post-service benefit. • Income earned from work-study programs. 	
7/1/2023	Consolidated Appropriations Act, 2021	471	Removes the number of household members enrolled in college from the FM calculation.	The FAFSA will retain the question asking about household members enrolled in colleges, for optional use by states and institutions for state and/or institutional aid.

Effective Date ¹	Legislation	HEA Citation	Change	Comment
7/1/2023	Consolidated Appropriations Act, 2021	475(f)(2)	For applicants with divorced or separated parents, which parent's information is required is determined based on which parent provided the greater portion of the student's financial support during the previous 12 months.	<p>Divorced and separated parents would continue to have only one parent's information on the FAFSA, but which parent's information is required would be determined based on which parent provided the greater portion of the student's financial support.</p> <p>Currently the deciding factor is based on which parent the student lived with more during the previous 12 months, or if the student lived with both parents equally, the student would instead include whichever parent provided more financial support in the previous 12 months or during the most recent year that support was provided.</p>
7/1/2023	Consolidated Appropriations Act, 2021	480(k)	Updates definition of family size to be based on IRS rules on dependents, ² for the prior-prior year.	<p>Currently the definition of a dependent is:</p> <ul style="list-style-type: none"> • A dependent of the parent is defined as the student, dependent children of the student's parents, including those children who are deemed to be dependent students when applying for aid and other persons who live with and receive more than one-half of their support from the parent and will continue to receive more than half of their support from the parent during the award year. • A dependent of the student is defined as the student's dependent children and other persons (except the student's spouse) who live with and receive more than one-half of their support from the student and will continue to receive more than half of their support from the student during the award year.

²IRS rules for dependents are included in IRS Publication 501 (2020), Dependents, Standard Deduction, and Filing Information: https://www.irs.gov/publications/p501#en_US_2020_publink1000196863

Effective Date ¹	Legislation	HEA Citation	Change	Comment
7/1/2023	Consolidated Appropriations Act, 2021	479(b)	<p>Updates simplified needs test eligibility (i.e. would not be required to provide asset information on the FAFSA) to include:</p> <ul style="list-style-type: none"> • Auto zero or automatic negative \$1500 SAI (non filers). • Dependent applicant whose parents total AGI is less than \$60K and did not file schedules A-F, or H or equivalent successor schedules. • Dependent applicant whose parents' total AGI is less than \$60K with no lettered schedules A-F, or H, other than Schedule C, and the Schedule C income loss or gain is less than \$10K. • Independent applicant with total AGI that is less than \$60K and who didn't file schedules A-F, or H or equivalent successor schedules. • Independent applicant with a total AGI of less than \$60K with no lettered schedules A-F, or H, other than Schedule C, and the Schedule C income loss or gain is less than \$10K. • Applicant, parents of dependent applicant, or spouse of independent applicant received means-tested benefits (SSI, SNAP, TANF, WIC, Medicaid, housing assistance, other MTBs determined by ED) in the previous 24-month period. 	A dependent applicant cannot qualify for the simplified formula if parents live outside of the U.S. or don't file U.S. taxes for any reason other than income being too low to file.
7/1/2023	Consolidated Appropriations Act, 2021	473(a)	Replaces the Expected Family Contribution (EFC) with the SAI which would determine eligibility for all types of Title IV student aid except the maximum and minimum Pell Grant awards.	The SAI could be as low as -\$1,500.
7/1/2023	Consolidated Appropriations Act, 2021	475	<p>Creates the SAI calculation for a dependent applicant:</p> $\frac{[(\text{Parent Available Income} + \text{Parent Available Assets}) + (\text{Student Available Income} + \text{Student Available Assets})] \times \text{Assessment Rate}}{\text{Dependent Student SAI}}$	Parents unmarried but living together have both of their income/assets considered in formula.

Effective Date ¹	Legislation	HEA Citation	Change	Comment
(continued)			<p>Calculation for Available Income/Assets</p> <ul style="list-style-type: none"> • Parent available income = Total income less federal taxes, FICA, IPA, employment expense allowance (35% of combined earned income; \$4K cap) • Parent available assets = Total parent assets - Asset Protection Allowance x 12% • Student available income = Student's total income less federal tax, FICA, IPA, allowance for parent negative available income) x 50% • Student available assets = Total assets x 20% 	
7/1/2023	Consolidated Appropriations Act, 2021	476	<p>Creates SAI calculation for an independent applicant without dependents:</p> <p style="text-align: center;">Student Available Income + Student Available Assets</p> <hr style="width: 20%; margin: auto;"/> <p style="text-align: center;">Independent Student SAI</p> <p>Calculation for Available Income/Assets</p> <ul style="list-style-type: none"> • Available income = Student's total income less federal tax, FICA, IPA, employment expense allowance (35% of total income; \$4k cap if married) x 50% • Available assets = Student's total assets less Asset Protection Allowance x 20% 	
7/1/2023	Consolidated Appropriations Act, 2021	477	<p>Creates SAI calculation for an independent applicant with dependents:</p> <p style="text-align: center;">(Student Available Income + Student Available Assets) x Assessment Rate</p> <hr style="width: 20%; margin: auto;"/> <p style="text-align: center;">Independent w/ dependents Student SAI</p> <p>Calculation for Available Income/Assets</p> <ul style="list-style-type: none"> • Available income = Student's total income less federal tax, FICA, income protection allowance, employment expense allowance (35% of combined earned income; \$4K cap) • Available assets = Student's total assets less Asset Protection Allowances x 7% 	

What's next?

Please join us for the **2021-22 NASFAA Webinar Series**



NASFAA's [live webinars](#) bring you the latest information, hot off the press, and allow you to actively engage with NASFAA staff and featured presenters from government, partner organizations, and fellow aid administrators.

[On Demand Webinars](#) are recordings of previously broadcasted events. The recordings are available for purchase and viewing at your convenience.

All webinars begin at 2:00 pm ET, unless otherwise noted, and last 60 to 90 minutes. Archives are usually available after the webinar for purchase; these archives are also free to webinar package purchasers.

Webinar Schedule for 2021-22 - See You Online!

Topic	Air Date
Panel Discussion: Cohort Default Rates	Sep 15, 2021
Always Never the Same: What's New with SAP and R2T4?	Sep 29, 2021
FAFSA Update: 2022-23	Oct 13, 2021
Center Stage: Verification 2022-23 (Extended Edition)	Oct 27, 2021
Recognizing and Eliminating Bias in Aid Office Policies And Procedures	Nov 17, 2021
Economics of Financial Aid Conversation	Dec 08, 2021
NASFAA Policy Update	Dec 15, 2021
Homeless Youth	Jan 26, 2022
Panel Discussion: 21st Century Skills for Financial Aid Administrators	Feb 23, 2022
NASFAA Quiz Show - Test Your Financial Aid Knowledge	Mar 09, 2022
Graduate and Professional School Town Hall 2021-22	Mar 16, 2022
Center Stage: Resolving Frequently Assigned Comment Codes, Flags, and Reject Codes	Mar 30, 2022
Center Stage: Summer Aid Issues	Apr 20, 2022
Hot Topic - TBD	May 18, 2022
NASFAA Policy Update	May 24, 2022
Hot Topic - TBD	Jun 08, 2022

* Complimentary for all Members. All other webinars are offered at the following rates: Site License: \$120 members/\$240 non-members/no charge for [webinar package](#) purchasers or Value Plus Members.

The National Association of Student Financial Aid Administrators (NASFAA) provides professional development for financial aid administrators; advocates for public policies that increase student access and success; serves as a forum on student financial aid issues; and is committed to diversity throughout all activities.

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