Membership Mobilization and Engagement:
School Counselor Webinar Series

It's Financial Aid Season:
Ready, Set, Go!

We will begin at 1:00 pm EST

Due to the large number of participants, all attendees' phones are muted on entry to the webinar. Please do not take your phone off mute. We look forward to answering questions via the "chat" feature that you will find in the menu bar above.

To get your call in number for the audio line, please use the menu bar above, go to the drop down box, and select Audio Conference.

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It's Financial Aid Season:
Ready, Set, Go!

Moderator: April Bell, Director, Membership Engagement and Mobilization, College Board

Panelists:

Julia Padgett, Director, Financial Aid Solutions, The College Board

Jesse O'Connell, Policy Analyst, National Association of Student Financial Aid Administrators (NASFAA)

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Submitting Online Questions – Chat Feature

Questions may be submitted at any time during the presentation using the chat feature. To submit a question:

➢ Click Chat icon
➢ Type your question into the chat dialog box.
➢ Select recipient "Fall Counselor Workshop"
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➢ **Note**: *At the conclusion of our session, we will be conducting an online poll. We thank you in advance for providing us your feedback!*
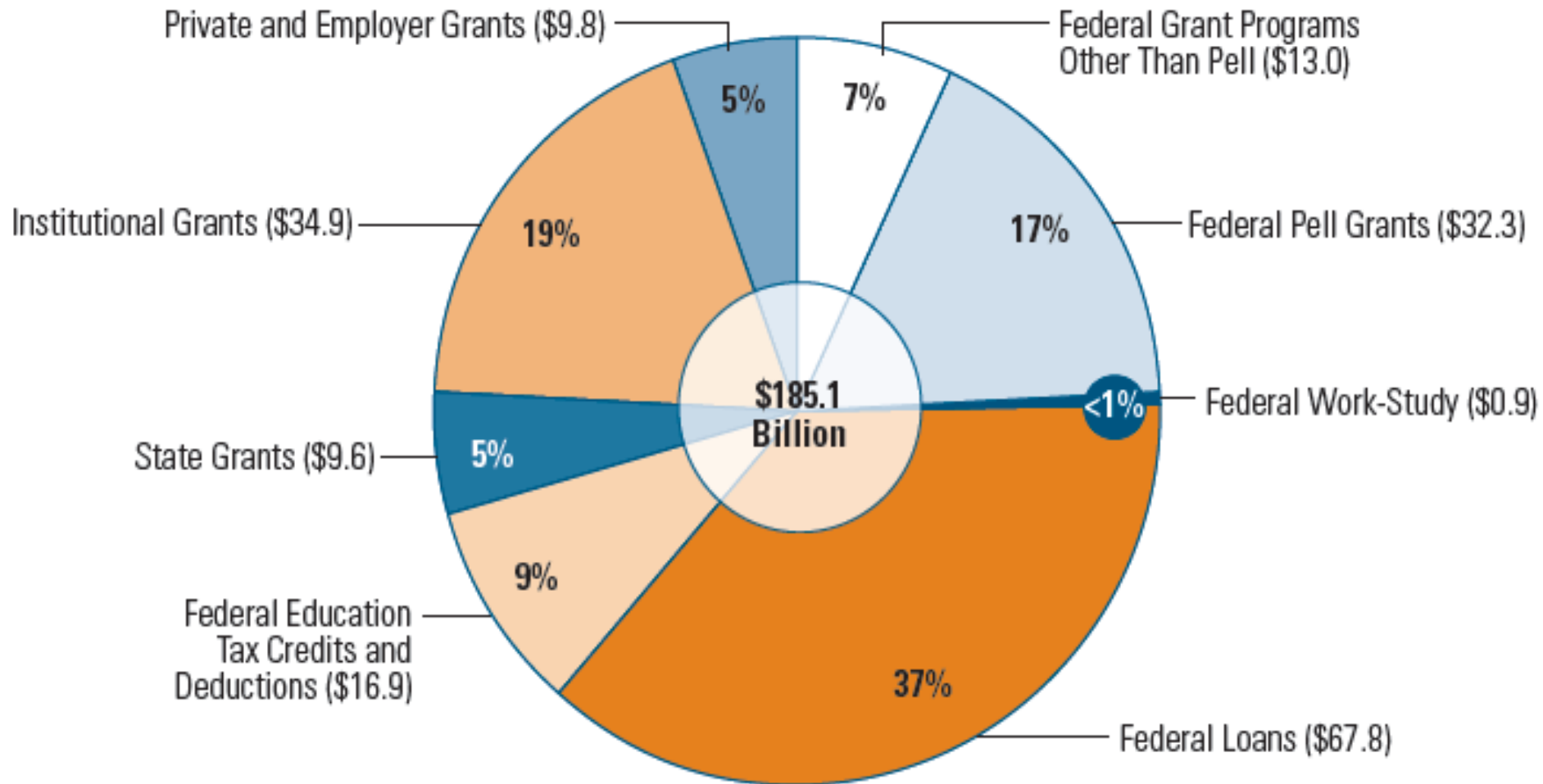

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Webinar Learning Outcomes

Webinar participants will learn:

- review research and data about the trends in financial aid for undergraduate students

- explore the details for completing the financial aid application process

- receive the answers to your "special circumstances" questions, including family businesses, expected student/family contributions, blended families, same-sex parents, undocumented students

- about various online financial aid resources including newly developed toolkits, search tools and social media sources

Introductions

Moderator:
April Bell, Director
Membership Mobilization and Engagement
College Board

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Trend in Student Aid

- In 2012-13, 49% of all student aid was in the form of grants — the highest percentage over the past decade. In 2008-09, 44% of student aid was grant aid.

- In 2012-13, 43% of all student aid was in the form of federal loans — the lowest percentage over the past decade. In 2008-09, federal loans constituted 49% of student aid.

- The federal government funded 71% of all student aid and 41% of all grant aid to postsecondary students in 2012-13.

- In 2012-13, $238.5 billion in financial aid was distributed to undergraduate and graduate students in the form of grants from all sources, Federal Work-Study, federal loans, and federal tax credits and deductions.

- In addition, students borrowed about $8.8 billion from private, state, and institutional sources.

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Undergraduate Student Aid by Source and Type
2012-13

Private and Employer Grants ($9.8) — 5%

Federal Grant Programs Other Than Pell ($13.0) — 7%

Institutional Grants ($34.9) — 19%

Federal Pell Grants ($32.3) — 17%

$185.1 Billion

Federal Work-Study ($0.9) — <1%

State Grants ($9.6) — 5%

Federal Education Tax Credits and Deductions ($16.9) — 9%

Federal Loans ($67.8) — 37%

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NASFAA: Who We Are

The National Association of Student Financial Aid Administrators (NASFAA) supports the training, diversity, and professional development of financial aid administrators; advocates for public policies and programs that increase student access to and success in postsecondary education; and serves as a forum for communication and collaboration on student financial aid issues.

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NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

NASFAA Member Resources

- Financial aid application checklist

- Award letter comparison worksheet

- Sample scholarship inquiry letter

- Financial aid glossary

- Associate Membership info:
  www.nasfaa.org/mkt/about/apply/Join_NASFAA.aspx

Free Application for Federal Student Aid (FAFSA)

- A standard form that collects demographic and financial information about the student and family

- May be filed electronically or using paper form
  - Available in English and Spanish
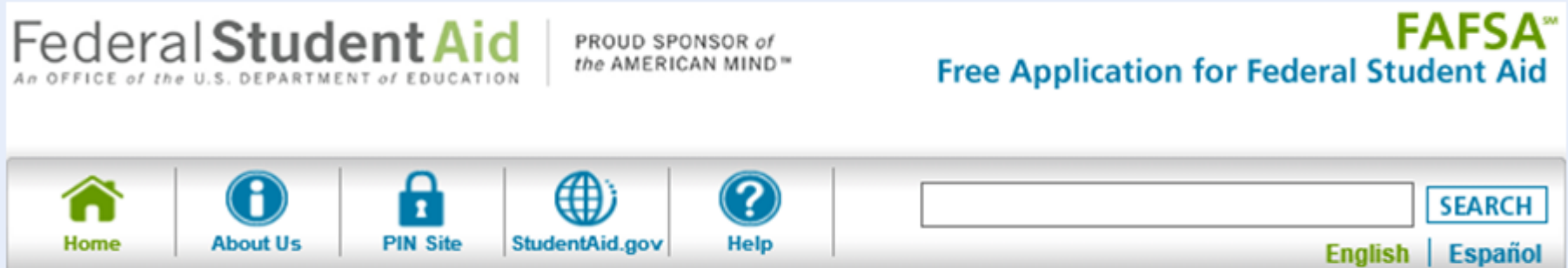
FAFSA

- Information used to calculate the expected family contribution (EFC)

  – Amount of money a student and his or her family may reasonably be expected to contribute towards the cost of the student's education for an academic year

- Colleges use EFC to award financial aid

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FAFSA

- May be filed at any time during an academic year, but no earlier than the January 1st prior to the academic year for which the student requests aid

- For the 2014–15 academic year, the FAFSA may be filed beginning January 1, 2014

- Most colleges set FAFSA filing deadlines

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FAFSA on the Web

- Website: www.fafsa.gov

- 2014–15 FAFSA on the Web available on January 1, 2014

- FAFSA on the Web Worksheet:

  – Used as "pre-application" worksheet

  – Questions follow order of FAFSA on the Web

FAFSA on the Web (FOTW)

Good reasons to file electronically:

- Built-in edits to prevent costly errors

- Skip-logic allows student and/or parent to skip unnecessary questions

- Option to use Internal Revenue Service (IRS) Data Retrieval Tool to import tax data

IRS Data Retrieval Tool

- While completing FOTW, applicant may submit real-time request to IRS for tax data

- IRS will authenticate taxpayer's identity

- If match found, IRS sends real-time results to applicant in new browser window

- Applicant chooses whether or not to transfer data to FOTW

IRS Data Retrieval Tool

- Available early February 2014 for 2014–15 processing cycle

- Participation is voluntary

- Reduces documents requested by financial aid office

Federal Student Aid Personal Identification Number (FSA PIN)

- Website: www.pin.ed.gov

- Sign FAFSA electronically

- Not required, but speeds processing

- May be used by students and parents throughout aid process, including subsequent school years

Student Dependency Status

FAFSA asks questions to determine dependency status for federal student aid (not IRS) purposes:

- If all "No" responses, student is dependent

- If "Yes" to any question, student is independent

Student Dependency Status

- You are independent if you are:
  - At least 24 years old
  - Married
  - A graduate or professional student
  - A veteran or a member of the armed forces
  - An orphan or a ward of the court
  - Someone with legal dependents other than a spouse
  - An emancipated minor
  - Homeless or at risk of becoming homeless

Signatures

- Required
  - Student
  - One parent (dependent students)
- Format for submitting signatures
  - Electronic using PIN
  - Signature page
  - Paper FAFSA

Frequent FAFSA Errors

- Social Security Numbers
- Divorced/remarried parental information
- Income earned by parents/stepparents
- Untaxed income
- U.S. income taxes paid
- Household size
- Number of household members in college
- Real estate and investment net worth

Making Corrections

If necessary, corrections to FAFSA data may be made by:

- Using FAFSA on the Web (www.fafsa.gov) if student has a PIN;

- Updating paper SAR (SAR Information Acknowledgement cannot be used to make corrections); or

- Submitting documentation to college's financial aid office

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CSS/Financial Aid PROFILE

Completion Guide

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What is PROFILE?

- An online application for financial aid
  - Available 24/7
  - Can be completed by domestic and international students

- Used by colleges and organizations to award their private funds

- List of institutions using PROFILE can be found at:
  - https://profileonline.collegeboard.com/prf/PXRemotePartInstitutionServlet/PXRemotePartInstitutionServlet.srv

How to file PROFILE

- Register
  - Create a College Board online account
  - http://student.collegeboard.org/PROFILE
    - Save your user name and password
  - Go to PROFILE online (link above) to begin

- Complete the application for the *correct school year*
  - Have your most recent tax records and financial documents handy
  - Click on the "help" text if you don't understand a question

- Submit the application
  - Enter your payment information (credit card, debit card)
  - Press Submit
  - Print out and save your PROFILE acknowledgement

CSS / Financial Aid PROFILE®

Apply for Financial Aid

Complete your PROFILE application to apply for financial aid.

Fall 2014 or **Spring 2015**   [Sign In]

Fall 2013 or **Spring 2014**   [Sign In]

What you need to know before you apply for financial aid

✔ Make sure to complete the correct PROFILE application. Only complete the Fall 2013 or Spring 2014 PROFILE application if you are entering or returning to school next spring (2014). Students entering or returning to school in the fall of 2014 or spring of 2015 should complete the Fall 2014 or Spring 2015 PROFILE application.

✔ Download and review our instructions (.pdf/52KB) for completing PROFILE Online. *Requires Adobe Reader (latest version recommended).*

Create your College Board Account

Welcome, Students

Are you a professional? Sign in to your account or sign up for an account here.

Sign In

Do you already have a College Board account?

Username:

Password:

Forgot username? Forgot Password?

Submit

Sign Up

Create your account today, and get started with the following:

- Register for the SAT
- Get AP scores
- Manage your college list online
- Register for the CLEP exam
- Complete CSS/Financial Aid PROFILE
- Use the Net Price Calculator
- Get email reminders

Create An Account

Register for PROFILE

What are the benefits of PROFILE?

- PROFILE is available October 1 each year – used for early action/early decision & other early reads

- Collects income, asset and household information for comprehensive view of family and resources

- Accurate and thorough need analysis provides institutions a better understanding of the family's financial situation

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The rest of the story….

- Allows families to explain any special circumstances

Is PROFILE complicated?

- Customized to the applicant and to the institution
  - Simple family financial situations = fewer questions
  - Complex family financial situations = more questions

- Presents only the questions relevant to the applicant

- Customer service available for students at:
  - Customer Service for Families: (305) 829-9793
  - Student & Parent Customer Service email: **help@cssprofile.org**

Click on ? for help text for each question

REGISTRATION

?	11. What is the current marital status of the student's biological or adoptive parents?	Divorced
?	11a. With which of the student's biological or adoptive parents did the student live with more during the past 12 months?	Father
?	12. What is the current marital status of the student's parent(s) who are providing information on this application?	Married
	13. Have the student's parent(s) completed an income tax return for the 2011 tax year?	
	Completed an income tax return	
?	14. What income tax return did or will the student's parent(s) file for the 2011 tax year?	1040
?	15. Does the student's parent receive Temporary Assistance for Needy Families (TANF)?	○ Yes ⦿ No
?	16. Does either of the student's parents receive Supplemental Security Income (SSI)?	○ Yes ⦿ No
?	17. Is either of the student's parents self-employed?	⦿ Yes ○ No
?	18. How many businesses, corporations, or partnerships do the student's parent(s) own all or part of?	1
?	19. How many farms do the student's parent(s) own all or part of?	1
?	20. What is the student's parent(s)' housing status?	Own home
?	21. What is the student's parent(s)' current country of residence?	United States

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When do I submit PROFILE

- Confirm application requirements and due date for each institution (check each school's web site for specifics)

- Submit the PROFILE at least two weeks prior to the institution's published due date

- Missing the due date can lead to delays and/or reduced funding

The Noncustodial PROFILE

- Collects same basic information as custodial parent PROFILE

- Objective data collection; diffuses family tension

- One time fee of $25

- Payment methods – credit or debit card

- Same fee waiver rules as PROFILE (no payment code)

- Student must be a PROFILE filer

Student PROFILE Fees

- $25 fee covers initial application processing and the first school report.

- $16 reporting fee for each additional college report or additional college requests (ACR)

- Students may pay using credit card or debit card

Fee Waivers

- Awarded automatically to eligible first year, dependent applicants

- Eligibility based on income, assets and family information

- Covers the cost of up to 8 PROFILE reports

- On average, first year applicants send PROFILE reports to 3.77 institutions

Fee Payment Codes

- Fee Payment Codes *may* be an option when a student does not qualify for Fee Waivers or sends more than 8 PROFILE reports

- Fee Payment Codes are mapped to the institution providing the code

- Fee Payment Codes can be used only once

Sample PROFILE Acknowledgement

Updating Your Information
[See More]

Application Responses

Below is the data you entered on your PROFILE Registration and Application.

Student's Name: Chris Complex	**CSS ID:** 2009403
Date: 11-01-2011	**User Name:** COMPLEXFAM8

Registration Data	
Question	**Response**
Student's Social Security Number	456-77-8888
Student's name	Chris Complex
Student's title	Mr.
Student's email address	finaidservices@collegeboard.org
Student's date of birth	09-01-1993
Student's permanent address	1010 Grove Street Reston, VA 20190
Student's mailing address	
Student's preferred telephone number	(703) 999-9999
1 What will be the student's year in college or university during 2012-13?	1st year (never previously attended college/university)
2 What will be the student's financial aid status during 2012-13?	First-time applicant, entering student (or transfer student)
3 What is the student's citizenship status?	U.S. citizen
4 What is the student's current marital status?	Single
5 Is the student a veteran of the U.S. Armed Forces or currently serving on active duty in the U.S. Armed Forces for purposes other than training?	No
6 Are both of the student's parents deceased, or is the student (or was the student until age 18) in foster care or a ward/dependent of the court, or as of today is the student an emancipated minor?	No
7 Does the student have legal dependents (other than a spouse)?	No
8 Has the student completed an income tax return for the 2011 tax year?	Completed an income tax return
9 What income tax return did or will the student file for the 2011 tax year?	1040
10 Does the student own all or a part of a business, corporation, partnership, farm, home, or other real estate, or is the student self	Yes

Additional College Requests

Helpful Resources

- **http://student.collegeboard.org/PROFILE**

- **https://bigfuture.collegeboard.org/**

- **https://bigfuture.collegeboard.org/pay-for-college/scholarships-grants**

- **https://fafsa.ed.gov**

- **http://studentnpc.collegeboard.org/**

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Tools, Resources and Professional Development Opportunities

National Training for Counselors and Mentors

The National Training for Counselors and Mentors (NT4CM) program supports states by providing free training, information, resources, and tools (for counselors and mentors) about federal, state, and local financial aid programs

- Founded by NASFAA, FSA and NCHER, now includes other associations

- Customizable curriculum

- Participating states receive free publicity materials to promote state training and initiatives

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StudentAid.gov Homepage

Financial Aid Toolkit http://financialaidtoolkit.ed.gov

- Consolidates and organizes FSA resources and content into a searchable online toolkit

- For organizations and individuals that interact with, support, or counsel students and families on funding a postsecondary education

  - Targeted to high school guidance counselors and college access professionals

  - FAAs may use toolkit to support student outreach efforts

  - FAAs can also help spread the word about the toolkit to organizations that work with students and families

- Replaces FSA4counselors.ed.gov
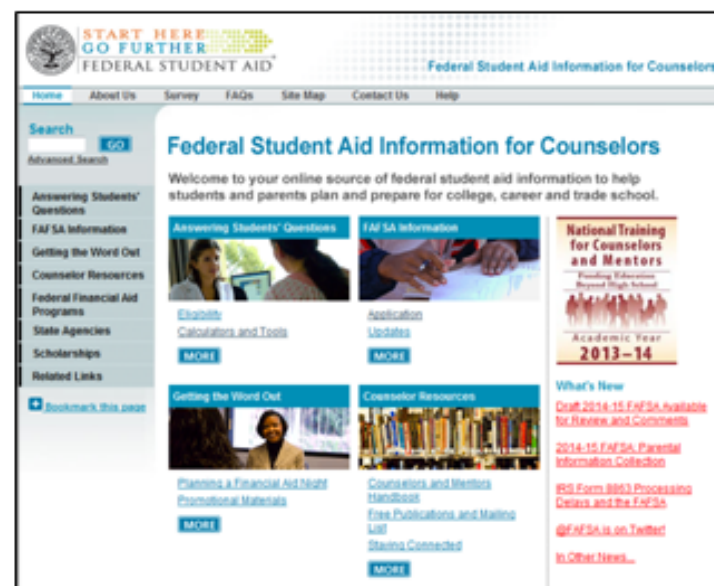
Old FSA4counselors Website

Federal **Student Aid**
An OFFICE of the U.S. DEPARTMENT of EDUCATION

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the AMERICAN MIND®

We want to hear from you!

General questions

Federal and institutional practices

Professional judgment

More complex family situations
(e.g., family business, blended families, same-sex parents, etc.)

Potential impact on financial aid

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Now Responding to Your Webinar Questions

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Join the Apply to Four or More Campaign

Please complete the online form (http://counselorworkshops.collegeboard.org/apply-to-four-or-more) to take the pledge.

As a part of joining this effort you will receive free resources in the mail this fall.

In the spring semester, we will email you a link to an online survey to capture your valuable feedback on how well the campaign performed at your school.

To thank you for completing the survey, you will receive a free copy of the **College Counseling Sourcebook** *(full PDF).*

College Board Professional Development Opportunities
To learn more, visit: http://professionals.collegeboard.com/prof-dev

National Forum

Destination Equity School Counselor Conference

Diversity Conferences

- Dream Deferred: The Future of African American Education
- Prepárate: Educating Latinos for the Future of America
- Native American Student Advocacy Institute (NASI)

Regional Forums

- In six (6) live events nationwide

Fall Counselor Workshops

- Live and online events

Summer Institutes

Webinars

Membership Mobilization & Engagement
Spring 2014 Webinar Series

School Counselor Professional Development Opportunities!

It's Financial Aid Season: Ready, Set, Go!	Wed., Jan 22, 2014	1:00 PM to 2:00 PM EST
College Admissions 101 for Sophomores, Juniors and Parents	Wed., Feb. 12, 2014	1:00 PM to 2:00 PM EST
You're Going to Miss Me When I'm Gone: Transitioning Students from High School To College	Wed., Mar. 12, 2014	1:00 PM to 2:00 PM EST
Building Leadership Skills in College and Career Readiness Counseling	Wed., Mar. 19, 2014	1:00 PM to 2:00 PM EST
School Counselors & College Access Providers: Partnership Power	Wed., April 30, 2014	1:00 PM to 2:00 PM EST

Register today!
To learn more, visit:
http://professionals.collegeboard.com/guidance or
http://counselorworkshops.collegeboard.org/

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Webinar Session Give Away!!
A Randomly Selected Poll Question Responder!

College Board College Planning Packet

"Apply to 4 or More" Tee shirt

Post-its Notes

Pencils & Ink Pens

Set of Handouts & Flyers

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THANK YOU

for your participation!

Note: This webinar will be archived.

A link to the presentation will be emailed to participants and made available online.

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