Summary of Changes for the Application Processing System

2009–2010

U.S. Department of Education

FEDERAL STUDENT AID

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Introduction

Overview

The *Summary of Changes for the Application Processing System* guide is designed to meet the reference needs of financial aid administrators (FAAs), programmers, and data processing staff. We describe updates and enhancements to the 2009-2010 application processing system in the following sections of this guide:

- **Major Changes** – This section provides information about major changes for the 2009-2010 processing year and covers the following topics:

    – FAFSA Redesign

    – Special Circumstances

    – Dependency Override Transactions Performed by Another School

    – Teacher Education Assistance for College and Higher Education (TEACH) Grant

    – Expected Family Contribution (EFC) Calculation

    – Reporting 529 College Fund Assets

    – Institutional Student Information Record (ISIR) Revisions

    – Incomplete Web Application Notification Process

- **Schedule for the 2009-2010 Application Processing System** – This section provides important processing deadlines and anticipated document and software release dates.

- **Summary of Changes to the 2009-2010 Free Application for Federal Student Aid (FAFSA)** – This section provides descriptions of the FAFSA and FAFSA on the Web Worksheet, including information about requesting and receiving paper forms and downloading electronic forms. Changes to the 2009-2010 FAFSA are described.

- **Summary of Changes to the 2009-2010 Central Processing System (CPS)** – This section provides information about changes to the CPS. The following areas are discussed:

  - Database Matches

  - CPS Edits

  - Need Analysis

  - Application Output Sent to Students

  - ISIR

  - Other Noteworthy Information

- **Getting Help** – This section provides contact information for customer service and lists useful documents and Web sites you can access for additional assistance.

We recommend you review the information provided in this guide and in the 2009-2010 versions of the *School Electronic Process Guide* and the *Student Web Application Products Process Guide*, as some enhancements may require you to modify your office procedures and system operations. These guides can be downloaded in November 2008 from Federal Student Aid's Information for Financial Aid Professionals (IFAP) (ifap.ed.gov) and Federal Student Aid Download (FSAdownload) (fsadownload.ed.gov) Web sites.

Major Changes

Description of Major Changes

In this section we describe major changes to the application processing system for 2009–2010, including updates and enhancements resulting from the College Cost Reduction and Access Act (CCRAA), P.L. 110-84. We will describe additional CCRAA changes in the *2009-2010 School Electronic Process Guide* and *2009-2010 Student Web Application Products Process Guide*, which will be posted in November 2008 to the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites.

Important Note: The Higher Education Opportunity Act (HEOA), P.L. 110-315, was enacted on August 14, 2008, and reauthorizes the Higher Education Act of 1965, as amended (HEA). Information about the HEOA can be found at ed.gov/heoa. Policy and operational guidance can also be found on the IFAP Web site (ifap.ed.gov). Watch these Web sites for details about the steps we are taking to implement the HEOA for the 2008-2009 and 2009-2010 award years.

FAFSA Redesign

Provisions of the CCRAA required that Federal Student Aid change some of the data collected on the FAFSA. As a result, in 2009-2010 we collect answers to five new dependency status questions, two dislocated worker questions, and one TEACH Grant question. Also, as described in further detail below, we eliminated Worksheets A, B, and C and moved data elements from the worksheets to the body of the FAFSA itself.

To create sufficient space on the FAFSA form for these new questions and data elements without expanding the total number of application pages, we restored some instruction text to the application pages and reduced the number of Notes pages. This change will reduce applicant cross-referencing between the Notes pages and the application pages, decreasing the overall amount of time it takes to fill out the application.

Worksheets A, B, and C Eliminated

The substantial changes to the FAFSA required by the CCRAA provided a timely opportunity for Federal Student Aid to review the order of application questions and address other form issues.

One significant change mandated by the CCRAA was to no longer collect the untaxed income information currently found in Worksheet A. Because we needed to eliminate Worksheet A, we decided to also delete Worksheets B and C and move the remaining data elements to the body of the FAFSA itself. These data elements have been grouped logically on the form as "Additional Financial Information" (questions 46.a-46.e for the student and 94.a-94.e for the parent) and "Untaxed Income" (questions 47.a.-47.j for the student and 95.a-95.i for the parent). The CPS will use the answers to these individual data elements to calculate total values for "Additional Financial Information" and "Untaxed Income."

Additional FAFSA redesign details are provided later in this document in the "Summary of Changes to the 2009-2010 FAFSA" section.

Special Circumstances

In prior cycles, a dependent applicant who was unable to provide parental data on the FAFSA due to special family circumstances was advised to use a paper application. To enable applicants in these situations to apply on the Web in 2009-2010, we are modifying FAFSA on the Web edits to allow a dependent applicant in this situation to bypass the parental questions. The dependent student will be allowed to submit the Web application for processing without parental data and will be advised to contact the financial aid office at the school he or she plans to attend. The FAA has sole authority to determine whether a valid special circumstance exists, and can then decide whether or not to perform a dependency override.

In order to limit the number of requests for dependency overrides because of this system modification, we have developed a process that will provide detailed guidance to FAFSA on the Web applicants regarding the limited set of conditions that may meet the special circumstances criteria.

The 2009-2010 version of FAFSA on the Web presents a series of prescreening Web pages and questions to an applicant describing what qualifies as a potential special circumstance. If the applicant still believes he or she has a special circumstance at the conclusion of this prescreening process, he or she will be allowed to submit the FAFSA without parental information.

As part of this new prescreening process, the applicant is:

- Informed that no EFC will be calculated.

- Advised to contact the financial aid office at the school he or she plans to attend for a formal determination as to whether valid special circumstances exist.

- Urged to gather and provide all relevant written evidence of his or her situation to the financial aid office to justify the request for special circumstances consideration.

- Advised that the financial aid office is not required to approve the request and that the school's decision is final and cannot be appealed to the U.S. Department of Education.

To help FAAs identify a FAFSA on the Web applicant who has indicated he or she has a special circumstance and did not provide parental data, the ISIR is sent to all schools listed on the application and also:

- Includes a new Special Circumstances Flag set to 1 (Dependent student record submitted without parental data).

- Includes comment code 295, referring the applicant to the financial aid office.

- Is processed by the CPS with rejects 2 and 15, a dependency status code X (rejected dependent student), and no EFC.

To help FAAs identify an applicant who originally believed he or she had a special circumstance but later provided parental data, the ISIR:

- Includes a change in the new Special Circumstances Flag from a value of 1 to 2 (Dependent student record previously submitted with Special Circumstances Flag, but correction made to include parental data).

- Includes comment code 296, noting the addition of parental data.

- Is processed by the CPS and, if no other reject circumstances exist (for example, missing signatures or conflicting or missing data), an EFC is calculated.

Important Note: The new special circumstances process we are implementing *does not* change the fact that *only* the FAA has the authority to decide if the student qualifies for a dependency override. This new process also *does not* change the existing process for performing a dependency override. See the following section "Dependency Override Transactions Performed by Another School" for information regarding one change mandated by the CCRAA that impacts documentation requirements for special circumstances.

We will provide additional information in the 2009-2010 versions of the *School Electronic Process Guide* and the *Student Web Application Products Process Guide*, which can be downloaded in November 2008 from the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites.

Dependency Override Transactions Performed by Another School

The Higher Education Act (HEA) of 1965, as amended, enables an FAA to perform a dependency override on a case-by-case basis for a student with a special circumstance who does not otherwise meet the criteria for an independent student. If the FAA determines that an override is appropriate, supporting documentation must be gathered and retained in the student's file. For 2008–2009, a dependency override cannot transfer from one school to another—it is valid only at the school that performs it.

Changes included in the CCRAA provide that, beginning with the 2009–2010 award year, a school may award Title IV, HEA program assistance using a SAR/ISIR transaction with a dependency override determination made by a previous school within the same award year. Therefore, the dependency override determination made by the original school is not limited to just the school that performed the override. At his or her discretion, an FAA can award Title IV aid based on a dependency override performed by another school within the same award year without gathering supporting documentation. As in prior years, a dependency override cannot be carried over from one year to the next; therefore, for each subsequent award year, the FAA must reaffirm that the override is still justified based upon the documentation provided for that current award year.

More information on dependency overrides will be available in the 2009-2010 Application and Verification Guide, scheduled to be posted to IFAP in January-February, 2009.

Important Note: As stated previously, the process at the CPS and at the school for performing a dependency override on a student's record *has not* changed.

The CPS will continue to remove all school codes from a student record except for that of the school making the dependency override. To access a student's transaction with a dependency override performed by another school, you will need the student's Data Release Number (DRN). You can then submit a correction to the student's record and include your Federal School Code. Alternatively, the student can add your school code to his or her record using Corrections on the Web or the paper SAR.

To help you determine if a dependency override has been applied to a student's transaction, FAA Access to CPS Online will now include an indicator for dependency override transactions on the Transactions page of Student Inquiry, along with the Federal School Code of the school that performed the dependency override.

You can also identify affected SAR/ISIR transactions by checking for new comment code number 284, which is directed to the student and states that the transaction was generated as a result of an FAA's decision to consider the student independent.

TEACH Grant

We continue to implement changes and enhancements related to the TEACH Grant provisions in the CCRAA. Later in this guide, we describe 2009-2010 changes such as the new TEACH Grant question on the FAFSA; new National Student Loan Data System (NSLDS) data for the TEACH Grant included on the ISIR, such as the postscreening and loan program codes; and changes to the printed Student Aid Report (SAR) and ISIR. Additional technical information on the changes to the ISIR record layout is provided in the Electronic Data Exchange (EDE) Technical Reference, which is available on the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites, and in the ISIR Guide, which will be available on the IFAP and FSAdownload Web sites in November 2008.

Expected Family Contribution Calculation

The 2009-2010 EFC calculation has been modified based on CCRAA changes. Provisions in the CCRAA mandate increases in the income protection allowances and increase the income threshold for an automatic zero EFC from $20,000 to $30,000.

See the Federal Register Notice dated May 29, 2008 on the IFAP Web site (ifap.ed.gov/fregisters/FR05292008.html) for details about changes to the 2009-2010 need analysis tables. You can also consult the *2009-2010 EFC Formula Guide*, which will be available on the IFAP Web site (ifap.ed.gov) later in 2008, for more information.

Reporting 529 College Fund Assets

We have included notes in the 2009-2010 FAFSA instructing applicants to report student owned 529-qualified education plans as a parental asset. This reporting change is mandated in the CCRAA.

ISIR Revisions

As always, the 2009-2010 ISIR follows the order of the paper FAFSA, and the remaining data elements such as processing results, assumed values, etc., are grouped with similar data elements in a logical order.

Incomplete Web Application Notification Process

We are implementing a new process to notify students and parents when an incomplete Web application is saved to our databases for more than seven days without submission and we do not have a completed application on file for the student.

An initial notification is sent when seven days have elapsed from the time the incomplete application is saved, with a follow-up notification sent at 14 days. These notifications are sent in English or Spanish, based on the language of the incomplete application, and are e-mailed or sent though postal mail.

By distributing these notifications, Federal Student Aid hopes to encourage more students to complete and submit FAFSAs that they may not realize are still pending and to help reduce student inquiries to FAAs regarding the status of unsent applications.

2009-2010 Application Processing System Schedule

Schedule for the 2009-2010 Application Processing System

Date	Event
May 29, 2008	The Secretary of Education announces the annual updates to the tables used in the statutory "Federal Need Analysis Methodology" to determine a student's EFC for award year 2009-2010 (May 29, 2008 [73 FR 30904]). ifap.ed.gov/fregisters/FR05292008.html
August 12, 2008	Federal Student Aid announces the availability of the *2009-2010 Electronic Data Exchange (EDE) Technical Reference* draft (including the ISIR Record Layout and ISIR Cross-Reference) on the IFAP and FSAdownload Web sites. ifap.ed.gov/eannouncements/0910EDETechRefAugDraft.html The *EDE Technical Reference* provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid.

Schedule for the 2009-2010 Application Processing System (Continued)

Date	Event
August 12, 2008	Federal Student Aid announces the availability of the *2009-2010 Application Processing System Specifications for Software Developers* on the IFAP and FSAdownload Web sites. Updated specifications were posted on October 22, 2008. The *Application Processing System Specifications for Software Developers* provides CPS system edits that can assist you in designing or building your own software to communicate with Federal Student Aid.
October 15, 2008	The *CPS Test System User Guide* is posted to FSAdownload (fsadownload.ed.gov). This user guide describes the CPS Test System, which enables you to test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment). The test system will be available on November 24, 2008.
October 2008	Federal Student Aid announces the availability of the complete version of the *2009-2010 Electronic Data Exchange (EDE) Technical Reference* on the IFAP and FSAdownload Web sites. The *EDE Technical Reference* provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid. The *EDE Technical Reference* includes information about record layouts, required edits, printing, and reject messages.

Schedule for the 2009-2010 Application Processing System (Continued)

Date	Event
October 2008	In preparation for the 2009-2010 cycle, postsecondary schools, high schools, libraries, and community agencies can begin to place orders for the FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system located at FSAPubs.org. The worksheet is a tool to assist students and parents who complete their FAFSAs on the Web and follows the flow and logic of the online application. Also available is the *Do You Need Money for College? Complete the Free Application for Federal Student Aid (FAFSA)* brochure, which explains the options for obtaining and completing the FAFSA. Also included are tips for completing the application. This brochure is available for order year-round.
November 1, 2008	The 2009-2010 Federal School Code List is available online on the IFAP (ifap.ed.gov) Web site.
Mid-November 2008	Federal Student Aid posts an electronic announcement asking schools to remind students to update their mailing and e-mail addresses in the CPS by January 11, 2009 so that Renewal Reminders can be sent to the correct address. A similar reminder message is posted on the FAFSA on the Web site during the same timeframe.
November 2008	The *2009-2010 ISIR Guide* is posted to the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites. The *ISIR Guide* assists FAAs in interpreting student information from an ISIR.
November 2008	The *2009-2010 SAR Comment Codes and Text* guide is posted to the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites. See this document for information on SAR comment codes and text.
November 2008	The *2009-2010 School Electronic Process Guide*, which describes 2009-2010 changes to Web products such as FAA Access to CPS Online and EDESuite PC products such as EDExpress, is posted to the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites.

Schedule for the 2009-2010 Application Processing System (Continued)

Date	Event
November 2008	The *2009-2010 Student Web Application Products Process Guide*, which describes 2009-2010 changes to student Web products such as FAFSA on the Web and the Federal Student Aid PIN Web site, is posted to the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites.
November 24, 2008	The CPS Test System is made available. The CPS Test System enables you to test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment).
November 2008	The *2009-2010 EFC Formula Guide* is posted to the IFAP Web site (ifap.ed.gov), pending final 2008 IRS tax legislation. This guide can be used to calculate an EFC.
Early December 2008	The PDF version of the FAFSA will be available for download from various Federal Student Aid Web sites, such as FederalStudentAid.ed.gov. Schools can also access the PDF from our Web sites, including FSAPubs.org.
Early December 2008	The PDF version of the FAFSA on the Web Worksheet is made available to students on the Student Aid on the Web site (studentaid.ed.gov) and the FAFSA on Web site (fafsa.ed.gov) and to schools on the IFAP Web site (ifap.ed.gov).
Early December 2008	The 2009-2010 FAFSA on the Web and FAA Access to CPS Online Demonstration sites are made available at fafsademo.test.ed.gov. The user name is "eddemo" and the password is "fafsatest."
Late December 2008	Students and parents can begin requesting up to three copies of the paper FAFSA from the Federal Student Aid Information Center (FSAIC).
Late December 2008	Federal Student Aid begins shipping orders of the 2009-2010 FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system located at FSAPubs.org.

Schedule for the 2009-2010 Application Processing System (Continued)

Date	Event
January 1, 2009	The 2009-2010 FAA Access to CPS Online Web site (fafsa.ed.gov/FOTWWebApp/faa/faa.jsp) is made available to FAAs. You can use this Web site to enter FAFSA and correction data, view a student's SAR information, compare two ISIR transactions for the same student, submit a signature flag for an application in a signature hold status, save FAFSA or correction data for later updates, review verification data with the Verification Tool, request ISIR data, analyze ISIR data as a basis for improving your verification process, and calculate and manage the return of Title IV funds.
January 1, 2009	The 2009-2010 FAFSA on the Web and Corrections on the Web sites are made available to students.
January 2, 2009	The 2009-2010 CPS begins processing.
January 11, 2009	For students to receive the 2009-2010 Renewal Reminder, any needed corrections to 2008-2009 student records must be made by January 11, 2009. These corrections may include updating e-mail or mailing addresses or resolving 2009-2010 renewal eligibility issues such as rejects. For example, if a student does not have a 2008–2009 transaction with an EFC because all transactions have reject codes, the rejects must be corrected by January 11, 2009 to create a valid transaction so that the student will receive a reminder notification for the new award year. You can continue to submit 2008–2009 applications and correction transactions for 2009-2010 renewal eligibility purposes after January 11, 2009, but affected students will not receive Renewal Reminders. These students will have access to their renewal FAFSA data, however.
January 15, 2009 – February 16, 2009	Renewal Reminders are sent to renewal-eligible students who have not yet filed a 2009-2010 FAFSA.
January 2009	If necessary, Federal Student Aid announces the availability of the revised *2009-2010 Application Processing System Specifications for Software Developers* on the IFAP and FSAdownload Web sites.

Schedule for the 2009-2010 Application Processing System (Continued)

Date	Event
January 2009	EDExpress for Windows 2009–2010, Release 1.0, which includes Global, Application Processing, and Packaging functionality for the 2009-2010 cycle, is posted to the FSAdownload Web site (fsadownload.ed.gov).
April 2009	The 2009-2010 ISIR Analysis Tool is made available on the FAA Access to CPS Online Web site. The ISIR Analysis Tool is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (either federally selected or defined by the school). A demonstration (demo) version of the ISIR Analysis Tool is also made available at this time as part of the FAA Access to CPS Online demo site, located at fafsademo.test.ed.gov. You must provide your Federal School Code, the user name ("eddemo"), and password ("fafsatest") to access the demo version of the ISIR Analysis Tool.
April 2009	EDExpress for Windows 2009–2010, Release 2.0, which includes the William D. Ford Federal Direct Loan (Direct Loan), Federal Pell Grant (Pell Grant) [including Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant)], and TEACH Grant modules for the 2009-2010 cycle, is posted to the FSAdownload Web site (fsadownload.ed.gov).
June 30, 2009	The CPS accepts 2008–2009 paper and electronic FAFSAs and renewal FAFSAs until June 30, 2009. Electronic FAFSAs must be transmitted to and received by the CPS by midnight Central Time (CT). Watch the IFAP Web site (ifap.ed.gov) for a Federal Register Notice that finalizes this deadline.
July 2009	Direct Loan (DL) Tools for Windows, Release 9.0, is posted to the FSAdownload Web site (fsadownload.ed.gov). DL Tools is a supplemental software product for Direct Loan participants and contains Rebuild, Cash Management, and Compare functionalities for the 2007–2008, 2008–2009, and 2009-2010 cycles.

Schedule for the 2009-2010 Application Processing System (Continued)

Date	Event
September 17, 2009	The CPS accepts 2008–2009 paper and electronic corrections until September 17, 2009. Electronic corrections must be transmitted to and received by the CPS by midnight CT. Watch the IFAP Web site (ifap.ed.gov) for a Federal Register Notice that finalizes this deadline.
June 30, 2010	The CPS accepts 2009-2010 paper and electronic FAFSAs until June 30, 2010. Electronic FAFSAs must be transmitted to and received by the CPS by midnight CT. Watch the IFAP Web site (ifap.ed.gov) for a Federal Register Notice that finalizes this deadline.
September 17, 2010	The CPS accepts 2009-2010 paper and electronic corrections until September 17, 2010. Electronic corrections must be transmitted to and received by the CPS by midnight CT. Watch the IFAP Web site (ifap.ed.gov) for a Federal Register Notice containing more information about this deadline.

Summary of Changes to the 2009-2010 FAFSA

2009-2010 FAFSA and FAFSA on the Web Worksheet Availability

Two Federal Student Aid forms assist applicants in providing their application data:

- **FAFSA** – Paper or electronic PDF form submitted by postal mail. The paper application can be ordered by students and parents from the Federal Student Aid Information Center (FSAIC). The PDF version of the paper FAFSA can be obtained online from various Federal Student Aid Web sites, such as FederalStudentAid.ed.gov, and printed for submission by postal mail.

- **FAFSA on the Web Worksheet** – Paper or electronic PDF worksheet that presents the FAFSA questions in the order in which they appear on FAFSA on the Web. The FAFSA on the Web Worksheet is the most effective tool applicants can use to facilitate the online application process. Applicants can complete the worksheet in preparation for their electronic application submission. This form is available for bulk orders or can be printed from the Web.

See below for more information about these forms.

FAFSA

Paper FAFSA Request

Due to the increased usage of FAFSA on the Web and the decreased usage of paper FAFSAs, we eliminated bulk distributions of the paper FAFSA in 2008–2009. However, the English and

Spanish versions of the paper FAFSA are still available. Beginning in late December 2008, students and families can request up to three copies of the paper FAFSA (in English or Spanish) by calling the Federal Student Aid Information Center (FSAIC) toll-free at 1-800-4-FED-AID (1-800-433-3243).

PDF FAFSA Availability

The PDF FAFSA is an official FAFSA that can be completed on the computer and printed or printed and completed by hand. The PDF form is then submitted to Federal Student Aid for processing through postal mail or submitted to a school that will store the form and submit the student's application data using FAA Access to CPS Online or a third-party software program.

English and Spanish 508-compliant PDF versions of the 2009-2010 FAFSA will be available online for download in early December 2008 from various Federal Student Aid Web sites, such as FederalStudentAid.ed.gov. Schools can also access the PDF from our Web sites, including FSAPubs at FSAPubs.org, in December.

FAFSA on the Web Worksheet

The 2009-2010 FAFSA on the Web Worksheet is available for bulk order by schools. We recommend you continue to remind students and their parents that the worksheet is not a FAFSA and will not be processed as such if submitted by mail.

FAFSA on the Web Worksheet Paper Request

Orders for the 2009-2010 FAFSA on the Web Worksheet can be placed beginning in October 2008. At that time, postsecondary schools, high schools, libraries, and community agencies can submit orders for copies of the FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system located at FSAPubs.org. Distribution begins in late December 2008. Additional worksheets can be ordered from the FSAPubs Web site throughout the processing year.

Students and families can request single copies of the worksheet by contacting FSAIC at 1-800-4-FED-AID (1-800-433-3243).

FAFSA on the Web Worksheet PDF Availability

The FAFSA on the Web Worksheet will also be available in PDF format in early December 2008 on Student Aid on the Web (studentaid.ed.gov), IFAP (ifap.ed.gov), and FAFSA on the Web (fafsa.ed.gov).

2009-2010 FAFSA

Federal Student Aid extensively revised and reorganized the FAFSA form for 2009-2010 to incorporate new data elements mandated by the CCRAA and improve the form's overall flow. The layout of the application packet, which continues to be ten pages, has been revised. The application has increased from four pages to six, and some instructions are incorporated into the application pages to decrease the number of references to the instructions.

The following section describes the changes and enhancements to the paper 2009-2010 FAFSA. We will look first at global changes to the FAFSA, followed by changes to the cover page, the application pages, and the instructions.

Changes to the Paper 2009-2010 FAFSA

Global Changes

- **Colors** – The 2009-2010 FAFSA colors are green for student information and purple for parent information. The green is PANTONE 390 CVU and the purple is PANTONE 263 CVU.

  The student color of the FAFSA continues with the four-year color rotation of yellow → orange → green → blue. Purple continues to be the color for parent information.

- **Year References** – All year references have been incremented by one year.

- **State Aid Deadlines** – We updated all state deadlines for 2009–2010.

- **IRS Tax Line Numbers** – We updated tax line references where applicable.

- **Changed Ovals to Circles** – As a part of the redesign process, we changed the ovals to circles.

- **Changed Box Size** – As a part of the redesign process and due to space limitations, we had to slightly decrease the size of the answer boxes.

- **Date Fields** – We added space between the month, day, and year boxes.

- **Income and Asset Fields** – We removed the comma that separated the thousands place in the income and assets fields.

- **Added Nine New Questions –** Questions 32, 56-60, 71, 85, and 103 were added to the FAFSA. Additional details on the new questions are provided later in this section.

- **Data Elements from Worksheets Embedded in the Form**– See the "Major Changes" section earlier in this guide for an overview of the elimination of the worksheets. Specific changes are listed below:

    – We deleted Worksheet A. The information previously found on Worksheet A is no longer collected.

    – We deleted Worksheets B and C and moved the individual data elements to the body of the FAFSA itself, grouped logically as Untaxed Income and Additional Financial Information, respectively.

    – We moved the Additional Financial Information (formerly Worksheet C) data elements before the Untaxed Income (formerly Worksheet B) data elements.

    – We collect values for each data element. The CPS then calculates the total for the data elements, includes the total in the ISIR file, and uses the total to calculate the EFC.

    – The student questions for Additional Financial Information are 46.a-46.e. and questions for Untaxed Income are 47.a-47.j.

    – The parent questions for Additional Financial Information are 94.a-94.e. and questions for Untaxed Income are 95.a-95.i.

- **Added Instructions for New Questions** – We added instructions for question 32, 45, 55, 56-57, 58-60, 85, and 103.

- **Moved Instructions from the Notes Pages to the Application –** As part of the redesign, we reunited instructions with the questions, and in some cases revised the question layout: 13, 16, 24-25, 39-40, Step Four, 63-70, 75, 76, 77-81, 89-90, 96, 97, and 98-102.

- **Revised Question Layout** – We revised the layout of questions on the application to include instruction text with the question answer or for spacing issues: 21-22, 26, 28-31, 33-34, 44-45, and 82-84.

- **Reordered Questions –** We reordered 2008–2009 questions 23-31 and the dependency status questions for better flow and ease of use.

Changes to the Cover Page (Page 1, not numbered)

- **State Aid Deadlines** – All state deadlines have been updated for 2009–2010. We removed the "www.fafsa.ed.gov" Web address that printed below the State Aid Deadlines heading. The same Web site address is given at the top of the form.

- **Mailing Your FAFSA** – We removed the "Do not send the worksheets on page 5: keep them for your records" sentence, since we no longer have a worksheet page.

Changes to the Application (Pages 3-8)

The application has increased from four pages to six pages.

Page 3

- **Question 13** – We revised the student's "e-mail address" question to include the instructions previously contained on the Notes page.

- **Questions 16 and 17** – We revised the student's "marital status" and "marital date" questions to include instructions that pertain to both questions and were previously contained on the Notes page.

- **Question 21** – For ease of use, we revised the format of the "Are you male or female" question, removed the "(Most male students must register with Selective Service to get federal aid)" text, and added text under the answer selection circles that reads "**(If female, skip to question 23)."**

- **Question 22** – For ease of use, we revised the "Selective Service registration" question. The question now reads "Most male students must register with Selective Service to get federal aid. If you are male, age 18-25 and not registered, fill in the circle and we will register you." We also changed the response from two choices ("Yes" or "No") to one choice, "Register me."

- **Question 26** – We revised the format of the "high school completion status" question to include the answer choices (instead of referencing the instructions for the code) and revised the question to read "When you begin college in the 2009-2010 school year, what will be your high school completion status?" The value of 4 was changed from "Other" to "None of the Above."

Page 4

- **Questions 28-31** – We revised the format of the "grade level," "degree or certificate," "enrollment status at the start of 2009-2010," and "aid interested in" questions to include the answer choices instead of referencing the instructions for the field values. We also reworded each question for clarity.

- **Added TEACH Grant Question 32** – We added a new question to the FAFSA specific to the TEACH Grant that reads "Are you planning to complete coursework necessary to become an elementary or secondary school teacher, either now or in the future? **See Notes page 2**" with Yes, No, and Don't know responses. This question was available on FAFSA on the Web for 2008-2009; however, there was not sufficient space or time to add it to the 2008-2009 paper FAFSA.

- **Step Two** – We revised the order of the sentences in the instructions.

- **Questions 33 and 34** – We revised the format of the "have you completed a tax return" and "type of tax return" questions so they are displayed next to each other instead of above and below each other.

- **Instructions for Questions 36–47** – We added "Report whole dollar amounts with no cents" to the instructions.

- **Questions 39 and 40** – For ease of use, we revised the format of the student and spouse's "earnings from work" questions, added instructions, and removed the labels "You" and "Your Spouse" that printed next to the answer boxes.

- **Questions 44 and 45** – We revised the veterans benefits questions because of new legislative changes. The questions and responses are new.

  - **Question 44** – The question now reads "Will you receive veterans education benefits between July 1, 2009 and June 30, 2010?" The responses are "Yes" and "No." If the applicant answers "No" he or she is advised to skip to question 46.

    In 2008-2009, the question asked the number of months that the applicant received veterans benefits.

  - **Question 45 -** The question now reads "What type of veterans education benefits will you receive? **See Notes page 2 and enter the correct number in the box.**" There is a box for a one-byte answer. The responses are:

    1 = Montgomery GI Bill - Active Duty (Chapter 30)
    2 = Post-9/11 GI Bill (Chapter 33)
    3 = Montgomery GI Bill - Selected Reserve (Chapter 1606)
    4 = Reserve Educational Assistance Program (Chapter 1607)
    5 = Vocational Rehabilitation and Employment (Chapter 31)
    6 = Dependents' Educational Assistance (Chapter 35)
    7 = Any other type of veterans education benefits

    In 2008-2009, the question asked the monthly amount of benefits.

Page 5

- **Question 46** – We added this question to collect the information from Worksheet C, now called "Student's 2008 Additional Financial Information." This question has five responses, 46.a-46.e.

  - 46.e is new (not previously collected on Worksheet C) and reads "Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. DO NOT enter untaxable combat pay reported on the W-2 in Box 12, Code Q." This question was added due to the CCRAA.

- **Question 47** – We added this question to collect the information from Worksheet B, now called "Student's 2008 Untaxed Income." This question has ten responses, 47.a-47.j.

  - CCRAA changes mandate that we no longer consider foreign income exclusions and special fuel credits as untaxed income. Therefore, we removed them as separate line

items and revised the "other untaxed income" question (47.i) to specify these exclusions and credits should not be included.

- **Step Three** – We revised the instructions to read "Answer all questions in this step to determine if you will need to provide parental information" and added five new questions, revised two questions, and reordered the questions in this section.

- **Question 53** – We added the text "between July 1, 2009, and June 30, 2010?" to the question to read "Do you have children who will receive more than half of their support from you between July 1, 2009, and June 30, 2010?"

- **Question 55** – We revised the "parents deceased or dependent/ward of the court" question to read "When you were age 13 or older, were both your parents deceased, were you in foster care or were you a dependent/ward of the court? **See Notes page 9.**" This change was necessary due to the expanded definition of an independent student to include students who were orphans, in foster care, or a ward of the court when age 13 or older, as mandated by the CCRAA.

- **Added Dependency Status Questions 56-60** – To accommodate the new independent student categories mandated by the CCRAA, we added five new dependency status questions with values of "Yes" or "No":

FAFSA Question Number	Question Text
56	As of today, are you an emancipated minor as determined by a court in your state of legal residence? **See Notes page 9.**
57	As of today, are you in legal guardianship as determined by a court in your state of legal residence? **See Notes page 9.**
58	At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless? **See Notes page 9.**
59	At any time on or after July 1, 2008, did the director of an emergency shelter program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless? **See Notes page 9.**
60	At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 9.**

Page 6

- **Reformatted Instructions at the End of Step Three** – We revised the instructions, increased the font size, and repositioned the text to make it more visible to the applicant.

- **Step Four** – We moved some of the instructions from the Notes page defining who is considered a parent to the Step Four instructions. Additional details are provided in the Notes on page 9.

- **Instructions for Questions 63-70** – We added the instructions "Enter two digits for each day and month (e.g., for May 31, enter 05 31)."

- **Added Parents' E-mail Address Question 71** – We added a new question to the FAFSA to collect the parental e-mail address. This data has been collected on FAFSA on the Web since 2004-2005.

- **Question 75** – We added instructions from the Notes page to the "parents' number in household" question.

- **Question 76** – We added instructions from the Notes page to the "parents' number in college" question.

- **Questions 77-81** – The CCRAA extends the time that an individual who received benefits from a means-tested Federal benefit program can qualify for a simplified needs test (SNT) or automatic zero EFC calculation from 12 to 24 months. Because of this change we revised the instructions and reformatted the federal benefits program questions. We also moved these questions to follow the "parents' number in college" question.

- **Questions 82 and 83** – We revised the format of "have your parents completed a tax return" and "type of tax return" questions so they display next to each other instead of above and below each other.

- **Question 84** – We revised the format of the "parents eligible to file a 1040A or 1040EZ" question.

- **Added Parent is a Dislocated Worker Question 85** – The CCRAA mandates that displaced workers are eligible for the SNT and automatic zero EFC calculations. As a result, we added a new question to determine if the applicant has a parent who is a dislocated worker. The question reads "As of today, are either of your parents a dislocated worker? **See Notes page 9**" with Yes, No, and Don't know responses.

Page 7

- **Instructions for Questions 86-95** – We added "Report whole dollar amounts with no cents" to the instructions.

- **Questions 89 and 90** – For ease of use, we revised the format of the "parents' earnings from work" questions, added instructions, and removed the labels "Father" and "Mother" that printed next to the answer boxes.

- **Question 94** – We added this question to collect the information from Worksheet C, now called "Parents' 2008 Additional Financial Information." This question has five responses, 94.a-94.e.

  - 94.e is new (not previously collected on Worksheet C), and reads "Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. DO NOT enter untaxable combat pay reported on the W-2 in Box 12, Code Q." This question was added due to the CCRAA.

- **Question 95** – We added this question to collect the information from Worksheet B, now called "Parents' 2008 Untaxed Income." This question has nine responses, 95.a-95.i.

  - CCRAA changes mandate that we no longer consider foreign income exclusions and special fuel credits as untaxed income. Therefore, we removed them as separate line items and revised the "other untaxed income" question (95.i) to specify these exclusions and credits should not be included.

Page 8

- **Question 96** – We added instructions from the Notes page to the "student's number in household" question.

- **Question 97** – We added instructions from the Notes page to the "student's number in college" question.

- **Questions 98-102** – The CCRAA extends the time that an individual who received benefits from a means-tested Federal benefit program can qualify for a SNT or automatic zero EFC calculation from 12 to 24 months. Because of this change we revised the instructions and reformatted the federal benefits program questions.

- **Added Student or Spouse is a Dislocated Worker Question 103** – The CCRAA mandates that displaced workers are eligible for the SNT and automatic zero EFC calculations. As a result, we added a new question to determine if the applicant or his or her spouse is a dislocated worker. The question reads "As of today, are you (or your spouse) a dislocated worker? **See Notes page 9**" with Yes, No, and Don't know responses.

- **Step Six** –We revised the second sentence of the instructions to read "You can find the school codes at **www.fafsa.ed.gov** or you can call 1-800-4-FED-AID." We added the FSAIC phone number to the instructions as a resource for determining the six-digit federal school code.

- **104.b, 104.d, 104.f, and 104.h** – Based on feedback from the community, we revised the order of the housing plan options so they read "on campus," "with parent," and "off campus."

Changes to the Instructions (Pages 2 and 9)

Moving many of the instructions to the application itself allowed us to decrease the Notes pages from four to two pages. Many of the following changes were made because of new questions or policy changes.

Page 2

- **Notes for question 30 (page 4) –** We moved the answer choices to the application question and reformatted the remaining instructions with bullets to draw attention to the different enrollment statuses.

- **TEACH Grant Instructions Added, Notes for question 32 (page 4) –** We added instructions for the new TEACH Grant question to describe the program, who is eligible, service obligations, consequences of not fulfilling the service conditions, and information on how to answer the question. A Web site (studentaid.ed.gov) is provided for more information.

- **Added Notes for question 42-43 (page 4) and 92-93 (page 7)** – The CCRAA changes the way 401[k] assets are reported. As a result, we reorganized the instruction text, added information on reporting 401[k] retirement plans, and clarified how education benefits and education savings plans should be reported. On the 2008-2009 FAFSA, a student who had to provide parental information for qualified educational benefits or education savings accounts was instructed not to include the value of an account he or she owned. The new instructions direct the student to report the value of the student-owned account as a parental investment in addition to any accounts owned by the parent for any member of the household.

- **Type of Veterans Education Benefits Instructions Added, Notes for question 45 (page 4) –** We added instructions for the revised "type of veterans benefits" question. We added seven codes to describe the type of benefits the applicant is receiving.

Page 9

- **Orphan, Foster Care, Ward of the Court Instructions Added, Notes for question 55 (page 5)** – We added instructions to help an applicant determine if he or she meets the conditions of being considered an orphan, in foster care, or a ward of the court. We also include instructions explaining that the applicant may need to provide proof to the FAA substantiating his or her situation.

- **Emancipated Minor or in Legal Guardianship Instructions Added, Notes for questions 56 and 57 (page 5) –** We added instructions to explain that the student can answer "Yes" to these questions if he or she can provide a copy of a decision from a court in his or her state of

legal residence stating he or she is an emancipated minor or in legal guardianship. We also added instructions explaining that the applicant may need to provide proof to the FAA substantiating his or her situation, such as a copy of the court's decision.

- **Unaccompanied Youth who is Homeless or At-risk of being Homeless Instructions Added, Notes for questions 58-60 (page 5)** – We added instructions that include definitions of "Homeless," "Unaccompanied," and "Youth" and instructions on how to answer these questions. We also added instructions explaining that the applicant may need to provide a copy of the determination of the status to the FAA substantiating his or her situation.

- **Notes for questions 61-95 (pages 6 and 7) Step Four** – We moved some of the instructions from this section to the Step Four heading and retained additional instructions on the Notes page. These instructions provide the applicant with additional information on who is considered a parent for the purposes of filling out the FAFSA.

- **Dislocated Worker Instructions Added, Notes for questions 85 (page 6) and 103 (page 8)** – We added instructions describing the conditions an individual must meet to be considered a dislocated worker. We also added instructions explaining that the applicant may need to provide proof to the FAA substantiating the situation.

Changes to the "What is the FAFSA?" Page (Page 10)

This is now page 10 instead of page 6 and has been reformatted to include the "What is the FAFSA?" and "Information on the Privacy Act and use of your Social Security Number" information.

- **Revised "What is the FAFSA?" Questions** –We revised the text in the following questions for clarity and conciseness.

  - **Why all the questions?**
  - **How do I find out what my Expected Family Contribution (EFC) is?**
  - **How much aid do I get?**
  - **How can I have more colleges receive my FAFSA Information?**
  - **Where can I get more information on student aid?**

- **Added "Information on the Privacy Act and use of your Social Security Number" Information –** We moved this information from the Notes pages and revised the question numbers that must be answered on the FAFSA to be considered for federal student aid.

We Value Your Comments and Suggestions!

Some of the changes we made to the 2009-2010 FAFSA were the result of feedback and comments we received from you. As always, we appreciate your contributions to improving the FAFSA and encourage you to continue to share your suggestions with us. We are particularly interested in ways to simplify the form by eliminating unnecessary data collection.

We encourage you to watch IFAP this winter, when we will post a Federal Register Notice requesting public comments on the 2010–2011 FAFSA.

Summary of Changes to the 2009-2010 Central Processing System

Database Matches

National Student Loan Data System (NSLDS)

NSLDS will send more detail about a student's financial aid history when his or her record is matched, including two new loan status codes, TEACH Grant data, and TEACH Loan data. This information is in turn provided on the SAR and ISIR. The changes to the NSLDS data sent to CPS include:

- **Two New Loan Status Codes** – NSLDS is adding two new loan status codes that print in the Loan Status Code field of the SAR and ISIR. These codes describe the current status of a loan in NSLDS.

  - FX is designated for fraudulent loans that are resolved.

  - PZ is designated for PLUS loans taken out by a parent for a student who has since died.

- **TEACH Grants**

  - **Up to Three TEACH Grant Detail Records** – NSLDS sends up to three detail records for the TEACH Grant in each student's record, and this information prints similarly to the data for the Pell Grant, ACG, and National SMART Grant on the SAR and ISIR.

- **TEACH Grant Overpayment Flag and Contact Code –** The NSLDS information includes a TEACH Grant Overpayment Flag if a school has reported that the student received a TEACH Grant overpayment. We will also include a school code for the school reporting the overpayment or a "Y" if more than one school reported an overpayment.

- **TEACH Loans**

  - **New NSLDS Postscreening Reason Code** – We use the new NSLDS Postscreening Reason Code "19" to identify student records that have changed during the postscreening process because a TEACH Grant was converted to a TEACH Loan.

  - **TEACH Loan Flags –** NSLDS includes the new TEACH Grant Loan Conversion Flag to indicate when a TEACH Grant has been converted to a loan. The new TEACH Grant Loan Conversion Change Flag indicates when there is a change to the TEACH Grant Loan Conversion Flag.

  - **TEACH Loan Program Code** – NSLDS now provides specific details on TEACH Loans. These loans are identified by a Loan Program Code of "D8."

  - **TEACH Loan Information –** NSLDS includes TEACH Loan totals and balances similar to other loan programs. The TEACH amounts included are TEACH Loan principal balance, TEACH Loan total, Aggregate TEACH Loan Undergraduate/Post Baccalaureate amount, and an Aggregate TEACH Loan Graduate amount.

CPS Edits

We incremented the year references in data element field titles and year parameters in our edits by one year. We also added and modified several CPS edits for 2009-2010. The edit changes are described below.

Warning Edits

Warning edits trigger highlights on the fields and a comment that prints on the SAR and ISIR. We added or revised warning edits to elicit more accurate reporting.

- **New TEACH Grant Edit** – We added a new warning edit that is generated when a Web applicant leaves the "completing teacher coursework" question blank on a renewal application. If the question is left blank, comment code 283 prints on the SAR and ISIR informing the student that he or she did not answer the question.

- **Enhanced TEACH Grant Edit** – We will now treat the response of "Don't know" to the "completing teacher coursework" question as a "Yes." Comment code 281 prints on a record when a student answers "Yes" or "Don't know" and refers the student to the TEACH Grant Web site to learn more about the program.

- **Deleted TEACH Grant Edit** – We deleted the edit and the resulting comment code (282) to eliminate the separate comment for paper, EDE, and FAA Access to CPS Online filers. Comment 282 was used in 2008-2009 to alert these filers to the availability of the TEACH Grant, since they were not presented with the "completing teacher coursework" question. Now that the question has been added for all filing methods, the comment is no longer needed.

Reject Edits

The only changes to the reject edits were to increment year references by one year.

Other Edits

- **Revised System Edits** – We revised edits throughout the system to reflect changes such as the removal of Worksheet A, the addition of new questions to the FAFSA, and the CCRAA changes to the EFC calculation.

Need Analysis

We updated the need analysis offsets, Income Protection Allowances (IPAs), and the total income calculation based on the CCRAA and changes to questions on the 2009–2010 FAFSA. The methodology for determining the EFC is found in Part F of Title IV of the Higher Education Act of 1965, as amended.

New for 2009-2010: The CCRAA extends the time that an individual who received benefits from a means-tested Federal benefit program can qualify for a simplified needs test (SNT) or automatic zero EFC calculation from 12 to 24 months. In addition, provisions in the CCRAA mandate that dislocated workers are eligible for the SNT or automatic zero EFC calculation if they meet the income threshold. The CCRAA also mandates an increase in the income threshold for an automatic zero EFC from $20,000 to $30,000.

See the Federal Register Notice dated May 29, 2008 on the IFAP Web site (ifap.ed.gov/fregisters/FR05292008.html) for details about changes to the 2009-2010 need analysis tables. You can also consult the *2009-2010 EFC Formula Guide*, which will be available on the IFAP Web site (ifap.ed.gov) later in 2008, for more information.

Application Output Sent to Students

In this section, we describe the application output enhancements to the Student Aid Report (SAR) and SAR Acknowledgment.

The SAR continues to be generated in letter format to provide information about the student's eligibility status, verification requirements, and guidance on correcting any assumptions made during processing.

The "FAA Information" section on the SAR continues to assist FAAs in finding information about a student's eligibility in one location, and the "NSLDS" section continues to display aggregate amounts with standard text regarding repayments.

The SAR Acknowledgement provides a summary of the student's processing results when the information is input electronically by the school or the student using the Web and an e-mail address is not provided. As with the SAR and the ISIR, the SAR Acknowledgement is an eligibility document containing information for the student and the FAA, but it cannot be used to make corrections like the SAR.

Mockups of the 2009-2010 SAR and SAR Acknowledgement can be downloaded from the IFAP Web site at ifap.ed.gov.

Global Changes

We incorporated the following changes and enhancements into the 2009-2010 versions of the SAR and SAR Acknowledgment:

- **Cycle Year Updates** – We updated all dates in field names and other content to match the changes to the FAFSA.

- **Color** – We print the 2009-2010 SAR and SAR Acknowledgements on green paper to match the color scheme of the 2009-2010 paper FAFSA.

- **Page Length Increased and Question Order Revised** – The length of the SAR has increased by two pages and the SAR Acknowledgement has increased one page. Both have been reorganized to follow the order of the questions as presented on the paper 2009-2010 FAFSA.

   – The English version of the SAR is now 10 pages and the Spanish version is 11 pages.

   – The English version of the SAR Acknowledgement is now three pages and the Spanish version is four pages

- **P.O. Box Number Updated** – We updated the post office box number in the mailing address for the 2009-2010 processing year.

- **Moved Parents' E-mail Address** – As we are now collecting the parents' e-mail address on the paper FAFSA in addition to on the Web, we now print the parents' e-mail address in the order in which it appears on the application. Previously, it was provided on the last page of the SAR and SAR Acknowledgment.

- **Special Circumstances Flag** – The new Special Circumstances Flag prints in the FAA Information section.

- **Discontinued Mailing the TEACH Grant Fact Sheet** – We continue to enhance our systems to incorporate CCRAA changes. As a result, we no longer mail the TEACH Grant Fact Sheet with the SAR; instead we now provide students with a reference on the FAFSA to studentaid.ed.gov, where information on the TEACH Grant can be obtained.

- **Masking SSNs** – To enhance security, we are masking or removing the student's and his or her parents' SSNs on documents for which they are not necessary for identification.

    - If the Social Security Administration (SSA) was able to confirm the student's SSN (question 8), father's SSN (question 63), or mother's SSN (question 67) during its match process, the first five digits of the SSN will print as "Xs" on the SAR and SAR Acknowledgement. The complete student SSN is still embedded in the footer of the SAR and SAR Acknowledgement.

    If the SSN cannot be confirmed, we will print the complete SSN so the student or parent can review the number that was submitted.

Student Aid Report (SAR)

In addition to the enhancements described above that affect both the SAR and the SAR Acknowledgement, we have made the following changes that affect just the SAR:

- **Tax Line Item Numbers Updated** – We updated tax line item numbers to match the respective IRS tax return line numbers.

- **Added TEACH Loan Information** – We added aggregate TEACH Loan information to the NSLDS Financial Aid History information. Loan information prints similarly to other loan program information.

Institutional Student Information Record (ISIR)

The ISIR contains all information reported on the FAFSA, key processing results, and NSLDS financial aid history information. As in recent cycles, the 2009-2010 ISIR record layout follows the order of the paper FAFSA questions.

ISIR Record Layout

Changes have been made to the 2009-2010 ISIR based on data element changes on the FAFSA, at the CPS, and at the NSLDS. As noted earlier in this guide, we posted a draft 2009-2010 ISIR record layout and 2009-2010 ISIR Cross-Reference Table describing the changes on the IFAP and FSAdownload Web sites in August 2008. An updated version of the ISIR record layout and cross-reference table will be posted in the Record Layouts and Processing Codes sections, respectively, of the *2009-2010 Electronic Data Exchange (EDE) Technical Reference*, which will be available in October 2008 on the IFAP Web site at ifap.ed.gov and the FSAdownload Web site at fsadownload.ed.gov.

Along with annual rollover changes that include adding, removing, renaming, and updating the fields and valid content based on changes to the FAFSA, some of the major changes to the ISIR are summarized below:

- **Record Length Increased** – The ISIR record layout increased from 3175 bytes to 3700 bytes due to new questions, revised worksheet data collection, and additional TEACH Grant data provided by NSLDS.

- **New Content** – We added new values to the following fields:

  - **Data Source and Type Codes** – We revised the application and transaction source/type codes. We modified source code of "6" to identify FAFSA on the Phone records entered by the Federal Student Aid Information Center. We added two type codes to identify PDF records, including "U" for the English PDF FAFSA and "V" for the Spanish PDF FAFSA. The new data sources/type codes are:

    4U = PDF application

    4V = Spanish PDF application

    6A = FAFSA on the Phone

    6B = Spanish FAFSA on the Phone

    6E = EZ FAFSA on the Phone

    6F = Spanish EZ FAFSA on the Phone

– **NSLDS Postscreening Reason Code** – A value of "19" for the NSLDS Postscreening Reason code indicates the student had a TEACH Grant that was converted to a loan.

– **NSLDS Loan Status Codes** – NSLDS is using two new status codes to describe loan statuses in its database:

- **Resolved Fraud Loan** – The code "FX" is used to describe a loan that was once considered a fraudulent loan but is now resolved.

- **Death of a PLUS Student** – The new "PZ" code is assigned to a PLUS loan that was taken out by a parent for a student who has since died.

– **NSLDS Loan Program Codes** – NSLDS is using the new loan program code "D8" for a TEACH Grant that has been converted to a loan.

- **Revised School Housing Plans Values** – Because of changes to the FAFSA, we revised the order of the housing plan choices. A value of "2" now indicates "with parent" and a value of "3" indicates "off campus."

- **Added Special Circumstances Flag** – We added the Special Circumstances Flag, which is set by the CPS on a Web application when a student completes the FAFSA without providing parental data.

- **Worksheets Deleted** – Worksheets A, B, and C have been eliminated. We no longer collect the information previously found on Worksheet A. The data elements previously found on Worksheets B and C have been moved to the body of the FAFSA itself and grouped logically under the question headings "Additional Financial Information" and "Untaxed Income." Review the "Changes to the Paper 2009-2010 FAFSA" section earlier in this guide for more details.

  – **New Data Elements** – Instead of providing a total for the worksheets on the FAFSA, the applicant provides a value for each data element that is now part of the form. These values are included in the ISIR record layout.

  – **Worksheet "Total" Fields are Calculated** – From the individual values provided by the applicant, the CPS calculates a total. The calculated values are contained in the appropriate fields, which are labeled Additional Financial Information Total Calculated by CPS and Untaxed Income Total Calculated by CPS.

- **Increased Field Length** – We increased the length of the Correction Flags, Highlight Flags, and FAFSA Data Verify Flags fields by 45 bytes each. This was necessary because of the addition of new FAFSA fields.

Printed ISIR

You are not required to print an ISIR. If you choose to print an ISIR, it does not need to print exactly as the EDExpress software prints it. A list of changes to the printed ISIR are listed below. You can find additional information on the printed ISIR in the Printing section of the *2009-2010 Electronic Data Exchange (EDE) Technical Reference*. This document is scheduled to be available in October 2008 on the IFAP Web site at ifap.ed.gov and the FSAdownload Web site at fsadownload.ed.gov.

Changes have been made to the 2009-2010 ISIR printed from EDExpress based on data element changes on the FAFSA, at the CPS, and at the NSLDS. Along with annual rollover changes, the major changes to the ISIR are summarized below:

- **Added "Coursework to become a Teacher?"** – We added the new TEACH Grant question that is on the FAFSA.

- **Reordered and Added Dependency Status Questions** – We reordered and added the new dependency status questions to match the FAFSA.

- **Added Worksheet Data Elements** – We now print the individual values from the FAFSA questions on the ISIR. We also print the total of the worksheet on the ISIR.

- **Added Parents' E-mail Address** – We added the parents' e-mail address to the ISIR.

- **Added Dislocated Worker Questions** – We added the student and parent dislocated worker questions to the ISIR.

- **Added Special Circumstances Flag** – We added the Special Circumstances Flag to the FAA Information section of the ISIR.

- **Revised the Certification Statement** – We changed references to "school" to "colleges."

- **TEACH Grant and TEACH Grant Converted to a Loan Data Added to NSLDS Information** – We print the new NSLDS fields that are included in the ISIR record on the NSLDS Information page, similar to the way we print other grant and loan information.

Other Noteworthy Information

Renewal FAFSA Process

As a reminder, last year we discontinued the use of the term "renewal" on Federal Student Aid Web sites and other resources geared to a student audience. This is still the case for 2009-2010. When a renewal-eligible student accesses FAFSA on the Web, we ask the student if he or she would like us to "pre-fill" his or her application with data from the previous year. If the student agrees, we present an application that is automatically filled with certain data from the student's prior-year application. Likewise, a student who submits a FAFSA4caster record prior to January 11, 2009 is also given the option of "pre-filling" the 2009-2010 FAFSA on the Web application with the FAFSA4caster data he or she provided.

However, throughout this guide and other Federal Student Aid communications written for FAAs, we continue to use the term "renewal application" (rather than "pre-filled application") to refer to FAFSAs with certain information already filled in for the student. We urge you to be aware of the two sources for renewal applications (prior-year FAFSA data or FAFSA4caster data) and the terms you use to describe those sources as you advise your students for the upcoming processing cycle.

We will provide additional renewal information in the *2009-2010 Student Web Application Products Process Guide*, which is scheduled to be available in November 2008 on the IFAP Web site at ifap.ed.gov and the FSAdownload Web site at fsadownload.ed.gov.

SAR Comments

SAR comments print on the SAR that is mailed to the student, display on the SAR on the Web, and are printed on an ISIR from EDExpress.

Some of the more significant changes to the comment code text include:

- We updated the year references and item numbers.

- We updated comments 026, 030, 033, and 057 to reflect the FAFSA question 22 ("do you want Selective Service to register you") response change from "Yes" to "Register Me."

- We updated the link name in comment 104.

- We deleted comment codes 163, 247, 248, 249, and 250 that referred to Worksheet A, which was deleted from the FAFSA.

- We updated the phone numbers in comments 200, 206, and 221.

- Because the TEACH Grant question is now available for every FAFSA filing method, we deleted comment 282. Comment 282 was used in 2008-2009 to notify applicants who did not use FAFSA on the Web (and therefore did not have an opportunity to answer the TEACH Grant question) about TEACH Grants.

- When new comments 289, 290, 291, 292, 293, and 294 (described in the table below) are assigned because of a TEACH Grant overpayment, the student record will also have the SAR C Flag set.

The comment codes in the following table are new for 2009-2010. The table provides a brief description of the reasons why the new comments would be included in a student's record. For more information, including the 2009-2010 SAR comment code text, see the *2009-2010 SAR Comment Codes and Text* guide, which will be posted in November 2008 to the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites.

New Comments

Comment	Reason this Comment Displays on the Record
283	The applicant left the "completing teacher coursework" question blank on a renewal application.
	We added this comment to notify the student of the TEACH Grant program.

New Comments

Comment	Reason this Comment Displays on the Record
284	The Dependency Override Flag is set on the applicant's record. We added this comment to notify the student that the FAA granted the dependency override to make the student independent.
285	This applicant filed a FAFSA on the Phone record and there is a signature reject 16 on his or her application. We added this comment to notify the student that his or her FAFSA on Phone application is not complete until the appropriate signatures are received.
286	The Parents' Additional Financial Information total is assumed to be zero. We added this comment to notify the student that we assumed the total amount of the parents' income deductions to be zero because the sum of the amounts reported in questions 94.a-94.e is unusually high, based on other income amounts reported.
287	The dependent student's Additional Financial Information total is assumed to be zero. We added this comment to notify a student that we assumed the total amount of the student's income deductions to be zero because the sum of the amounts reported in questions 46.a-46.e is unusually high, based on other income amounts reported.
288	The independent student's Additional Financial Information total is assumed to be zero. We added this comment to notify a student that we assumed the total amount of the student's income deductions to be zero because the sum of the amounts reported in questions 46.a-46.e is unusually high, based on other income amounts reported.
289 to 294	The applicant has a TEACH Grant overpayment. We added these comments to provide the applicant with contact information to resolve the TEACH Grant overpayment.

New Comments

Comment	Reason this Comment Displays on the Record
295	The applicant filed on the Web and did not provide parental information because he or she indicated special circumstances. The record is rejected and the Special Circumstances Flag is set to **1** (Dependent record submitted without parental data).
	We added this comment for the new Web application process enabling a dependent student to submit his or her application data without parental information. This comment informs the applicant that he or she must contact the FAA before eligibility can be determined.
296	The applicant provided parental information on a rejected transaction that included the Special Circumstances Flag but the Dependency Override Flag is not set on the record. The Special Circumstances Flag is set to **2** (Correction made to parental data).
	We added this comment to inform the applicant that parental data was added to the application after he or she originally indicated that there were special circumstances and parental information could not be obtained.

Reminder! As part of the 2008-2009 SAR redesign process, the decision was made to remove the text for comment codes 047, 050, 112, 149, 158, 159, 170, and 171 from the paper SAR comments section on page three and instead to present the information contained in these comments as variable text in the appropriate section on the first page. Comment text for these comments displays on the Web only. We described this change in an electronic announcement on the IFAP Web site at ifap.ed.gov/eannouncements/0320SARComment.html.

Because the text for these comments was replaced with variable text on the SAR and SAR Acknowledgement, we do not display or print the text on an ISIR printed from the EDExpress for Windows software. Note, however, that the comment code numbers are included in the ISIR file and appear in the FAA Information section of the printed ISIR. Schools using EDExpress still have the ability to query their database using these comment code numbers.

Mailing Addresses

FAFSA Processor

FAFSA (Including Pacific Islanders)	Federal Student Aid Programs P.O. Box 7001 Mt. Vernon, IL 62864-0071
PDF FAFSA	Federal Student Aid Programs P.O. Box 7002 Mt. Vernon, IL 62864-0072
Spanish FAFSA	Federal Student Aid Programs P.O. Box 7003 Mt. Vernon, IL 62864-0073
Spanish PDF FAFSA	Federal Student Aid Programs P.O. Box 7007 Mt. Vernon, IL 62864-7007
SAR	Federal Student Aid Programs P.O. Box 7004 Mt. Vernon, IL 62864-0074
Spanish SAR	Federal Student Aid Programs P.O. Box 7005 Mt. Vernon, IL 62864-0075

Signature Pages

FAFSA on the Web Corrections on the Web	Federal Student Aid Programs P.O. Box 7006 Mt. Vernon, IL 62864-0076

Getting Help

Customer Service

FSATECH Listserv

FSATECH is an e-mail listserv for technical questions about Federal Student Aid systems, software, and mainframe products.

For information on subscribing, go to ed.gov/offices/OSFAP/services/fsatechsubscribe.html.

CPS/SAIG Technical Support

800/330-5947 (TDD/TTY 800/511-5806)

Federal Student Aid maintains this call center to address questions about CPS processing, EDExpress and EDconnect software, SAIG enrollment, and data transmissions, and to collect system enhancement suggestions.

Representatives are available Monday through Friday, 8 a.m. to 8 p.m. Eastern Time (ET).

E-mail: CPSSAIG@ed.gov

Federal Student Aid Information Center (FSAIC)

800/4-FED-AID (800/433-3243); 319/337-5665; or TDD/TTY 800/730-8913

The Federal Student Aid Information Center (FSAIC) serves the public with information about the federal student aid application process. FSAIC customer service representative support is provided in English and Spanish. Customers include students, parents, and FAAs seeking general information about federal grant and loan programs and assistance with the FAFSA (paper and FAFSA on the Web versions, including Federal Student Aid PIN assistance) and student aid processing timeframes.

Types of FSAIC assistance also include: FAFSA application status checks, completion of FAFSA and FAFSA corrections, requests to change addresses and Federal School Codes on the FAFSA, duplicate Student Aid Report (SAR) requests, identification of holders of existing student loans (including contact information), and Federal Student Aid publication fulfillment.

Representatives are available Monday through Friday, 8 a.m. to 12 a.m. ET, and on Saturdays 9 a.m. to 6 p.m. ET (excluding federal holidays).

Federal Student Aid's Research and Customer Care Center (RCCC)

800/433-7327 (phone); 202/275-5532 (fax)

This call center provides information on and assistance with Title IV policy, regulations, application processing questions, and contacting other Federal Student Aid staff.

Representatives are available Monday through Friday, 9 a.m. to 5 p.m. ET.

E-mail address: fsa.customer.support@ed.gov

Other Helpful Documents

We encourage you to review other documents on the IFAP and FSAdownload Web sites for more information about changes to the 2009-2010 application processing system:

- *2009-2010 Application Processing System Specifications for Software Developers,* October 22, 2008: Provides CPS system edits that can assist you in designing or building your own software to communicate with Federal Student Aid. Available on the IFAP (ifap.ed.gov) and FSAdownload (fsadownload.ed.gov) Web sites. A final draft will be posted in January 2009.

- *2009-2010 Electronic Data Exchange (EDE) Technical Reference*, October 2008: Describes the 2009-2010 EDE process and provides programmer specifications and information that can assist you in designing or building your own software to complement or take the place of the EDExpress software to exchange data electronically with Federal Student Aid.

- *2009-2010 Student Web Application Products Process Guide*, November 2008: Describes changes and enhancements to student Web application products (FAFSA4caster, FAFSA on the Web, and the Federal Student Aid PIN Web site) for 2009–2010.

- *2009-2010 School Electronic Process Guide*, November 2008: Describes changes and enhancements for the 2009-2010 versions of FAA Access to CPS Online and EDESuite PC products and includes descriptions of non-cyclical school products such as Return of Title IV Funds (R2T4) on the Web and SSCR.

- *2009-2010 ISIR Guide*, November 2008: Provides in-depth information regarding the 2009-2010 Institutional Student Information Record (ISIR).

- *2009-2010 SAR Comment Codes and Text*, November 2008: Describes changes to SAR comment codes and associated text for 2009–2010.

- *2009-2010 EFC Formula Guide*, November 2008: Provides worksheets and tables that can be used to calculate an estimated EFC for students.

Federal Student Aid Web Sites

- CPS Web Applications Demonstration Web site: fafsademo.test.ed.gov

- FAA Access to CPS Online: fafsa.ed.gov/FOTWWebApp/faa/faa.jsp

- Federal Student Aid Conferences Web site: fsaconferences.ed.gov

- FSAdownload Web site: fsadownload.ed.gov

- FSATECH e-mail listserv subscription information:
  ed.gov/offices/OSFAP/services/fsatechsubscribe.html

- Information for Financial Aid Professionals (IFAP) Web site: ifap.ed.gov

- Training Information and Registration Web site for upcoming training opportunities and
  learning resources: ed.gov/offices/OSFAP/training/index.html