



Early FAFSA Summer Training 2016



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for weekly scholarship and financial aid information

- Two Changes
 - Earlier FAFSA Availability
 - 2017–18 FAFSA available Oct. 1, 2016
 - Change to October 1 availability is permanent
 - Earlier Year of Income Information Required
 - For 2017-2018 FAFSA, 2015 income information required

CHANGES TO THE FAFSA® PROCESS FOR 2017–18

SUBMIT A FAFSA EARLIER: Students will be able to submit a 2017–18 FAFSA as early as Oct. 1, 2016, rather than beginning on Jan. 1, 2017. The earlier submission date will be a permanent change, enabling students to complete and submit their FAFSAs as early as October 1 every year. (There is NO CHANGE to the 2016–17 schedule. The 2016–17 FAFSA became available Jan. 1, 2016.)

USE EARLIER INCOME AND TAX INFORMATION: Beginning with the 2017–18 FAFSA, students will report income and tax information from an earlier tax year. For example, on the 2017–18 FAFSA, students (and parents, as appropriate) will report their 2015 income and tax information, rather than their 2016 income and tax information.

Here's a summary of key dates for submitting the FAFSA depending on when you plan to go to school:

IF YOU PLAN TO ATTEND COLLEGE FROM	YOU WILL SUBMIT THIS FAFSA	YOU CAN SUBMIT THE FAFSA FROM	USING INCOME AND TAX INFORMATION FROM
July 1, 2015–June 30, 2016	2015–16	January 1, 2015–June 30, 2016	2014
July 1, 2016–June 30, 2017	2016–17	January 1, 2016–June 30, 2017	2015
July 1, 2017–June 30, 2018	2017–18	October 1, 2016–June 30, 2018	2015
July 1, 2018–June 30, 2019	2018–19	October 1, 2017–June 30, 2019	2016

Why the Changes?

- Longer timeframe to complete the FAFSA
 - 3 extra months
 - FAFSA and college admissions applications can now be completed at the same time
- Easier to complete the FAFSA
 - No need to estimate tax information
 - IRS Data Retrieval Tool available immediately
 - No need to update income information

Why the Changes?

- More time to evaluate financial aid offers
 - Verification can be completed earlier.
 - Award letters may be available earlier (hopefully!).
 - More time to compare financial aid award prior to the May 1 decision day.

- Will deadlines be earlier?
 - Don't know for sure, so keep these things in mind:
 - Check (and recheck in September) deadlines for each school on the school's website.
 - State of Maine Grant deadline for 2017-2018 will remain May 1.
 - Encourage students to file as soon as possible
 - Some schools award aid first-come, first-served - no downside to filing early.
 - Students can add additional colleges after the FAFSA is filed.

- Will 2016–17 FAFSA info be carried over to Renewal FAFSA?
 - No - too much could have changed.
 - IRS DRT provides easy importation of data to keep process quick.

- Can a student choose to report 2016 information?
 - No - student does not have a choice of which year (must use 2015 on the 2017-2018 FAFSA).
 - Student must report information for the year asked for on the FAFSA.
 - Certain items on FAFSA are “as of today,” so read each question and fill out accordingly.

- Does that mean that current college students who filed a 2016-2017 FAFSA will use 2015 income information two years in a row?
 - Yes – for this transition period only, the same income information (2015 tax year) is being use two years in a row.
 - To avoid conflicting information, students and parents should use the IRS Data Retrieval Tool, if possible, for both years.

- What if income has changed significantly since 2015?
 - 2015 income information must be used on the 2017-2018 FAFSA, even if changes have occurred.
 - If income is now significantly different, contact the Financial Aid Office to discuss further.

- Will students receive aid offers earlier if they apply earlier?
 - Maybe, but we don't know for sure.
 - Students need to be offered admission before an aid offer will be sent.
 - Timeframes will vary by school.
 - Early aid offers will likely be estimates (Pell amounts not released until early 2017 and tuition rates may not be set).

Steps to Prepare for Changes

- Many high schools had spring Financial Aid Nights – thank you!
- September
 - Encourage/remind students and parents to get their FSA ID (username and password). Share [FAME's FSA ID Tracking Worksheet](#)
 - Explain that the FAFSA will be available soon.
 - Encourage students and families to be ready to file early - best way to maximize financial aid.
 - Share information on FAME's FAFSA Lab locations



Resources to Help You Prepare

- FAME
 - FAMEmaine.com
 - [Early FAFSA](#)
 - [Filing the FAFSA](#)
 - Social Media
 - Facebook.com/FAME Education
 - Twitter.com/FAME Education

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Resources to Help You Prepare

- Federal Student Aid
 - FinancialAidToolkit.ed.gov/fafsa-changes
 - Social Media
 - [Twitter.com/FAFSA](https://twitter.com/FAFSA)
 - [Facebook.com/FederalStudentAid](https://facebook.com/FederalStudentAid)
 - YouTube.com/FederalStudentAid

Resources to Help You Prepare

- Federal Student Aid Webinar Training
 - National Training for Counselors and Mentors (NT4CM)
 - Thursday, August 18
 - 1:30 pm – 3:00 pm
 - Click [here](#) to register



National Training for Counselors and Mentors
Funding Education Beyond High School
Academic Year 2017–2018

The National Training for Counselors & Mentors (NT4CM) is Sponsored by the U.S. Department of Education

The National Training for Counselors and Mentors (NT4CM) provides information to help you support students and their families in preparing financially for college. This webinar will provide comprehensive up-to-date information regarding federal and state student aid programs, applying for financial aid, scholarship searches, and helping plan a financial aid event. Participants will learn how to access free financial aid resources such as fact sheets, brochures, websites, and PowerPoint presentations to help you help your students and their families.

Topics that Will be Covered:

- FAFSA changes: 2017–2018
- Federal Policy Update
- Social Media Tools
- NT4CM Module Overview
- Q&A Session

Who Should Attend?

High school counselors, mentors, college access professionals and others who are focused on college readiness.

Attend this Free Webinar
Thursday, August 18, 2016
1:30 PM – 3:00 PM ET

REGISTER TODAY!
NT4CM

To register, visit: <http://fsaregistration.ed.gov/nt4cm>
For more information, visit: www.FinancialAidToolkit.ed.gov/nt4cm

Completing the FAFSA –



**Use the IRS Data
Retrieval Tool (DRT) Initially**

Use the IRS DRT Initially

- The 2017-2018 FAFSA will require 2015 income information - already processed!
- The IRS DRT will be available when the FAFSA is released on October 1.
- Both parents and students can potentially use the IRS DRT if 2015 taxes were filed.

Use the IRS DRT Initially

- Encourage applicants to use the IRS DRT when originally filing the FAFSA
 - Easier to complete the FAFSA
 - Helps prevent conflicting information
 - Financial aid offices have to resolve conflicting information

Use the IRS DRT Initially

- Conflicting Information:
 - If IRS DRT was used in either year with no changes, institutions can assume that the values are correct and submit corrections to the other year's ISIR information (unless tax return was amended).
 - As students complete FAFSA, real-time warnings will appear if income or tax amounts being input for 2017-18 differ from the amount(s) reported for 2016-17.

Who Can't Use the IRS DRT?

- Who Can's Use the IRS DRT?
 - Parents with all zeroes or first three digits of 666 for SSN;
 - Any student or parent who indicated on the FAFSA they did not file a tax return;
 - Married individuals who filed as “Married Filing Separately” or “Head of Household” or unmarried parents who are living together and filing separate tax returns;
 - Those who have filed an amended tax return; or
 - Parents or students who file a foreign or Puerto Rican tax return.

- The IRS DRT is available within the Financial Section for both parents and students, if applicable.
- Remember, within the FAFSA, you can't skip over sections initially (skip logic requires questions to be answered in sequence).
- Once a section is completed, you can go backwards or forward.

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Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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Parent Tax Information

Application was successfully saved.

For 2015, have your parents completed their IRS income tax return or another tax return?

For 2015, what is your parents' tax filing status according to their tax return?

⚙ To determine if you, the parents, can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into the FAFSA, **answer the following question(s)**:

Did you, the parents, file a Form 1040X amended tax return?
 Yes No

Did you, the parents, file a Puerto Rican or foreign tax return?
 Yes No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

Which parent are you?

What is your (the parent's) FSA ID?

FSA ID Username or Verified E-mail Address [Create an FSA ID](#)
 [Forgot Username](#)
[Forgot Password](#)

FSA ID Password [LINK TO IRS](#)

Help and Hints

Recently Filed Taxes?

If you, the parent(s), filed your taxes electronically within the last 3 weeks, or by mail within the last 11 weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.



This option wouldn't appear if yes had been the answer to any of the questions above.

for ME 

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your FAFSA information will be saved.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.


Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

Site Last Updated: Sunday, December 27, 2015 Download [Adobe Reader](#)

[Privacy](#)

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[Return to FAFSA](#) | [Log Out](#) | [Help](#)
[Español](#)


Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return. Required fields *

First Name *	<input type="text" value="m"/>
Last Name *	<input type="text" value="FSA"/>
Social Security Number *	*** - ** - 1415
Date of Birth *	<input type="text" value="11"/> / <input type="text" value="10"/> / <input type="text" value="1980"/>
Filing Status *	Married Filing Joint Return
Address - Must match	
Street Address *	<input type="text"/>
P.O. Box (Required for PO Boxes)	<input type="text"/>
Apt. Number (Required for Apts.)	<input type="text"/>
Country *	<input type="text"/>
City, Town or Post Office	<input type="text"/>
State/U.S. Territory *	Select One
ZIP Code *	<input type="text"/>

Message from webpage




THIS U.S. GOVERNMENT SYSTEM IS FOR AUTHORIZED USE ONLY!
 Use of this system constitutes consent to monitoring, interception, recording, reading, copying or capturing by authorized personnel of all activities. There is no right to privacy in this system. Unauthorized use of this system is prohibited and subject to criminal and civil penalties, including all penalties applicable to willful unauthorized access (UNAX) or inspection of taxpayer records (under 18 U.S.C. 1030 and 26 U.S.C. 7213A and 26 U.S.C. 7431).

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

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IRS Data Retrieval



[Return to FAFSA](#) | [Log Out](#) | [Help](#)
[Español](#)

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return. ? Required fields *

First Name *	<input type="text" value="GDIT"/>
Last Name *	<input type="text" value="data"/>
Social Security Number *	*** - ** - 2656
Date of Birth *	<input type="text" value="01"/> / <input type="text" value="01"/> / <input type="text" value="1992"/>
Filing Status * ?	Married-Filed Joint Return ▼
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States ▼
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One ▼
ZIP Code *	<input type="text"/>

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.





[IRS Privacy Policy](#)

It is very important that individuals have a copy of their tax return with them so that the address can be entered exactly!

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Parent 2015 Federal Income Tax Information


The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers 
Tax Year	2015	
Name(s)	Gdit Data	
Social Security Number	*** - ** - 2656	
Filing Status	Married-Filed Joint Return	Question 82 on the FAFSA
Type of Tax Return Filed	1040	Question 81 on the FAFSA
Adjusted Gross Income	\$33,400	Question 85 on the FAFSA
Income Earned From Work 	\$35,430	Your filing status indicates you may need to split this amount and enter it in two places on the FAFSA. Parent 1: Question 88 on the FAFSA and/or Parent 2: Question 89 on the FAFSA
Income Tax	\$8,900	Question 86 on the FAFSA
IRS Exemptions	1	Question 87 on the FAFSA
Education Credits	\$5,900	Question 93a on the FAFSA
IRA Deductions and Payments	\$4,400	Question 94b on the FAFSA
Tax-Exempt Interest Income	\$4,650	Question 94d on the FAFSA
Untaxed IRA Distributions 	\$7,900	Question 94e on the FAFSA
Untaxed Pensions 	\$6,900	Question 94f on the FAFSA

 Print this page for your records before choosing an option below.


Transfer My Tax Information into the FAFSA

- The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.



Do Not Transfer My Tax Information and Return to the FAFSA

- By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.



[IRS Privacy Policy](#)

Once the information is found, here is what you will see.

Once box is checked, the "Transfer Now" button can be clicked

Works for ME 

You will be able to see which questions were updated with data from the IRS

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
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Parent Financial Information

You have successfully transferred your 2015 IRS tax information.

The parents' IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS."

What type of income tax return did your parents file for 2015?
 Transferred from the IRS

IRS 1040 ▼

What was your parents' adjusted gross income for 2015? This amount is found on IRS Form 1040-line 37.
 \$.00 Transferred from the IRS

Your parents' total income earned from working in 2015 was **transferred from the IRS.** This amount is the total of IRS Form 1040-lines 7+12+18.
 \$.00

Of the \$35,430.00, enter the amount that your parents each earned from working in 2015. [How do I do this?](#)

Your Parent 1 (father/mother/stepparent) \$.00

Your Parent 2 (father/mother/stepparent) \$.00

Did either (or both) of your parents file an IRS Schedule K-1 (Form 9865) for 2015?
 Yes No

As of today, is either of your parents a dislocated worker?
 ▼

In 2014 or 2015, did your parents receive benefits from any of the federal benefits programs listed below? Check all that apply or check **None of the above.**

Supplemental Security Income (SSI)

Supplemental Nutrition Assistance Program ([SNAP](#))

Free or Reduced Price Lunch

Temporary Assistance for Needy Families ([TANF](#))

Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

None of the above

Help and Hints

Parents' Type of 2015 Tax Form Used
Question 81

If your parent uses the IRS Data Retrieval Tool and transfers his / her information from the IRS into your FAFSA, the answer to this question will be pre-filled and identified as "Transferred from the IRS."

If the answer to this question is not pre-filled, you must select the income tax return that your parents filed or will file for 2015:

- IRS 1040
- IRS 1040A or 1040EZ
- A foreign tax return
- A tax return for a U.S. territory or a Freely Associated State (including Puerto Rico).

Be sure to update wages!



Completing the Financial Section

- Finish providing parent income information.
- If asked about assets, keep in mind that the value reported is “as of today.”
- If student income information is required, student can also use the IRS DRT if filed taxes for 2015.

- No need to go back and update income information.
- However, still very important to review the Student Aid Report (SAR) to make sure:
 - All necessary information was provided;
 - No mistakes or information entered incorrectly; and
 - Aware of any follow up or next steps.





Questions?

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