

Summary of Changes for the Application Processing System

2021–2022

U.S. Department of Education



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Introduction

Overview

The *Summary of Changes for the Application Processing System* is designed to meet the reference needs of financial aid administrators (FAAs), National College Attainment Network (NCAN), Federal TRIO program staff, guidance counselors, programmers, and data processing staff. In this guide, we describe updates and enhancements to the 2021-2022 application processing system and to student and school Web products. We recommend you review the information provided in this guide, as some enhancements may require you to modify your office procedures and system operations.

The following sections are included in this guide:

- **Major Changes** – This section provides information about major changes for the 2021-2022 processing cycle and covers the following topics:
 - Need Analysis Income Threshold Increase
 - Schedule 1 Question Changes
- **2021-2022 Application Processing System Schedule** – This section provides important processing deadlines and anticipated document and software release dates.
- **Summary of Changes to the 2021-2022 FAFSA on the Web, MyStudentAid Mobile App, and Paper FAFSA® Form** – This section describes changes and enhancements for the 2021-2022 FAFSA on the Web site and myStudentAid mobile application. It also provides descriptions of the paper FAFSA form and FAFSA on the Web Worksheet, information about downloading the electronic documents, and describes changes to the documents.
- **Summary of Changes to FAA Access to CPS Online** – This section provides information about FAA Access to CPS Online (FAA Access) enrollment requirements and changes to FAA Access.
- **Summary of Changes to the 2021-2022 Central Processing System** – This section provides information about changes to the U.S. Department of Education’s Central Processing System (CPS). The following areas are described:
 - Database Matches
 - CPS Edits
 - Need Analysis
 - Application Output Sent to Students

- Student Aid Report (SAR) Comments
- Mailing Addresses
- **Getting Help** – This section provides contact information for customer service and lists useful documents and Web sites you can access for additional assistance.

In addition to the annual 2021-2022 system updates that we will implement in October 2020, we plan to release other system updates intermittently. Scheduling intermittent releases enables us to continuously improve our Web sites and other systems.

We will describe enhancements implemented during the processing cycle in various future communications posted on the Information for Financial Aid Professionals (IFAP) Web site at ifap.ed.gov, including electronic announcements and updated guides and references.

Unless otherwise noted, we are implementing the changes described in this guide in October 2020, at the start of the 2021-2022 processing cycle.

Major Changes

Description of Major Changes

In this section, we describe major changes to the application processing system, mobile application, and Web products for 2021-2022, including updates and enhancements resulting from annual and legislative changes. You can find policy and operational guidance on the IFAP Web site.

Need Analysis Income Threshold Increase

The income threshold for an automatic zero Expected Family Contribution (EFC) increased from \$26,000 to \$27,000 for the 2021-2022 award year.

Schedule 1 Question Changes

Mobile and Web Changes

When users choose to populate their mobile or FAFSA on the Web application via the Internal Revenue Service (IRS) Data Retrieval Tool (DRT), the DRT will now automatically answer the question about whether or not they filed a Schedule 1. The answer will be based on all current exceptions for filing a Schedule 1. The transferred data for the Schedule 1 fields will be handled the same as other data transferred using the IRS DRT.

Because the field will be automatically populated, the response to the “Filed a Schedule 1?” question for students and/or parents (depending on who uses the IRS DRT) will not appear in the following locations:

- Student Applications/Renewals
- Student Corrections

Because all information transferred from the IRS is considered sensitive, the “Filed a Schedule 1?” question and response will be masked in the following locations:

- eSAR
- SAR
- SAR Acknowledgement
- FAFSA Summary
- Application Summary Report

In these locations, instead of the “Filed a Schedule 1?” entry fields, students and parents will see the words “Transferred from the IRS.”

For those who do not use the IRS DRT, the help topics connected to the “Student Filed Schedule 1?” and “Parent Filed Schedule 1?” questions have been updated to include all current exceptions for filing a Schedule 1. “Capital Gains” has been removed as an exception, and “Virtual Currency” has been added. These help text updates are in effect for the 2021-2022 cycle—“Capital Gains” is still considered an exception for the 2020-2021 cycle. The removal of “Capital Gains” and addition of “Virtual Currency” also apply to questions 35 and 82 on the 2021-2022 version of the paper FAFSA form.

FAA Access Changes

Updated Instructions in Application/Renewal and Corrections

We have updated the help text and the instructions that accompany the “Filed Schedule 1?” questions for students and parents in the FAFSA/Renewal Application and Corrections to include all current exceptions for filing a Schedule 1 as follows:

2021-2022 cycle

- Question 35. Student Filed Schedule 1? Answer **No** if the student and/or their spouse did not file Schedule 1 or only filed Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency.
- Question 82. Parents Filed Schedule 1? Answer **No** if the student’s parents did not file Schedule 1 or only filed Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency.

2020-2021 cycle

- Question 35. Student Filed Schedule 1? Answer **No** if the student and/or their spouse did not file Schedule 1 or only filed Schedule 1 to report: capital gain, unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend.
- Question 82. Parents Filed Schedule 1? Answer **No** if the student’s parents did not file Schedule 1 or only filed Schedule 1 to report: capital gain, unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend.

FAA Corrections and Student Inquiry, ISIR Compare, and eSAR Changes

When users choose to populate their mobile or FAFSA on the Web application via the IRS DRT, the DRT will now automatically answer the question about whether or not they filed a Schedule 1. The answer will be based on all current exceptions for filing a Schedule 1. The transferred data for the Schedule 1 fields will be handled the same as other data transferred using the IRS DRT. In FAA Access Corrections, “Transferred from the IRS” will display next to any field that contains data that a student or parent transferred directly from the IRS while using FAFSA on the Web. This text will only display if information was transferred directly from the IRS Web site and was not changed by the applicant. If any information transferred from the IRS is corrected, the “Transferred from the IRS” text will be removed from all fields.

We added Filed Schedule 1 to the Student IRS Data Field Flags and the Parent IRS Data Field Flags in Student Inquiry, ISIR Compare, and eSAR.

2021-2022 Application Processing System Schedule

Schedule for the 2021-2022 Application Processing System

Date	Event
May 4, 2020	<p>Federal Student Aid announced the availability of the 2021-2022 Electronic Data Exchange (EDE) Technical Reference draft (including the ISIR Record Layout and ISIR Cross-Reference).</p> <p>The <i>EDE Technical Reference</i> provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid.</p>
June 3, 2020	<p>Federal Student Aid announced the availability of the 2021-2022 Electronic Data Exchange (EDE) Technical Reference.</p> <p>The <i>EDE Technical Reference</i> provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid. The <i>EDE Technical Reference</i> includes information about record layouts, required edits, printing, and reject messages.</p>
June 5, 2020	<p>The Secretary of Education announced the annual updates to the tables used in the statutory “Federal Need Analysis Methodology” to determine an applicant’s EFC for the 2021-2022 processing cycle (June 5, 2020 Federal Register [85 FR 34605]).</p>

Date	Event
June 18, 2020	Federal Student Aid announced the availability of the CPS Test System User Guide . This user guide describes the CPS Test System, a system in which you can test electronic application and correction-data transmissions from your system to the CPS (outside of the normal CPS production environment). The test system will be available on September 27, 2020.
June 18, 2020	Federal Student Aid announced the availability of the 2021-2022 Application Processing System Specifications for Software Developers . The publication provides CPS system edits that can assist you in designing and building your own software to communicate with Federal Student Aid.
July 1, 2020	Federal Student Aid announced the availability of the FAFSA MyStudentData Download Record Layout . This guide includes the record layout for the FAFSA MyStudentData download file. The file includes a subset of a student's processed results in a machine-readable, plain text file.
July 14, 2020	Federal Student Aid announced the availability of the 2021-2022 ISIR Guide . The guide assists FAAs in interpreting applicant information from an Institutional Student Information Record (ISIR).
July 21, 2020	Federal Student Aid announced the availability of the 2021-2022 SAR Comment Codes and Text guide. The guide provides the SAR comment codes, comment text, reject resolutions, and database match information.
August 2020	Federal Student Aid announces the availability of the EFC Formula Guide , pending final 2021-2022 Need Analysis legislative updates. This guide can be used to calculate an EFC.
September 1, 2020	Federal Student Aid announces the availability of the 2021-2022 FAFSA.gov Preview Presentation . This Microsoft PowerPoint presentation contains information and screen shots pertaining to the 2021-2022 FAFSA on the Web site that can be used as a tool for internal staff training or high school night presentations.
September 1, 2020	Federal Student Aid announces the availability of the 2021-2022 myStudentAid Preview Presentation . This Microsoft PowerPoint presentation contains information and screen shots pertaining to the 2021-2022 myStudentAid mobile app that can be used as a tool for internal staff training or high school night presentations.

Date	Event
September 2020	Federal Student Aid announces the availability of the EExpress for Windows Packaging Technical Reference . This technical reference provides instructions and record layouts for schools and other organizations that need to integrate their software or systems with the EExpress 2021-2022 Packaging module (available October 2021). Record layouts are included for all imports from external systems, such as Packaging Import External Add, Packaging Import External Change, and Packaging Import Add Funds. Packaging module setup guidance and setup worksheets are also provided.
September 27, 2020	The 2021-2022 <i>CPS Web Applications Demo System</i> is available at fafsademo.test.ed.gov .
September 27, 2020	The CPS Test System is available. You can test electronic application and correction-data transmissions from your system to the CPS (outside of the normal CPS production environment).
September 28, 2020	Federal Student Aid announces the availability of the EExpress for Windows 2021-2022, Release 1.0, which includes Global, Application Processing, and Packaging functionality for the 2021-2022 processing cycle.
October 1, 2020	The 2021-2022 FAA Access to CPS Online Web site (faaaccess.ed.gov) is available to FAAs.
October 1, 2020	The 2021-2022 FAFSA on the Web site is available to applicants.
October 1, 2020	The IRS DRT is available to 2021-2022 FAFSA applicants.
October 2, 2020	CPS begins processing 2021-2022 applications.
October 2020	The PDF FAFSA form is available for download from the “Resources” page at StudentAid.gov/sa/resources#fafsa .
October 2020	The FAFSA on the Web Worksheet PDF is available for download from the “Resources” page at StudentAid.gov/sa/resources#fafsa .
October 2020	Applicants and parents can begin requesting up to three copies of the paper FAFSA form from the Federal Student Aid Information Center.
October 2020	Federal Student Aid announces the availability of the final 2021-2022 Application Processing System Specifications for Software Developers .
November 2020	The 2021-2022 Federal School Code List is available online. This document is updated quarterly.

Date	Event
March 2021	EDEXpress for Windows 2021-2022, Release 2.0, is available. This software includes the William D. Ford Federal Direct Loan (Direct Loan), Federal Pell Grant (Pell Grant), and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules for the 2021-2022 cycle.
June 2021	Direct Loan (DL) Tools for Windows, Release 19.0 is available. DL Tools is a supplemental software product for Direct Loan participants and contains Rebuild, Cash Management, and Compare functionalities for the 2019-2020, 2020-2021, and 2021-2022 cycles.
Late June 2021	The CPS accepts 2020-2021 paper and electronic FAFSA forms and renewal FAFSA forms until late June 2021. Watch for a Federal Register notice with the final deadline. Electronic FAFSA forms must be transmitted to and received by the CPS by midnight Central Time (CT) to meet the deadline.
Mid-September 2021	The CPS accepts 2020-2021 paper and electronic corrections until mid-September 2021. Watch for a Federal Register notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.
Late June 2022	The CPS accepts 2021-2022 paper and electronic FAFSA forms until late June 2022. Watch for a Federal Register notice with the final deadline. Electronic FAFSA forms must be transmitted to and received by the CPS by midnight CT to meet the deadline.
Mid-September 2022	The CPS accepts 2021-2022 paper and electronic corrections until mid-September 2022. Watch for a Federal Register notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.

Summary of Changes to the 2021-2022 FAFSA on the Web, myStudentAid Mobile App, and Paper FAFSA® Form

2021-2022 FAFSA on the Web Changes and Enhancements

In this section, we describe the 2021-2022 changes to FAFSA on the Web. The main change for FAFSA on the Web is to the way the Schedule 1 question is processed and defined.

Schedule 1 Question Changes

The Schedule 1 question and associated help text that appear in the Parent Financials and Student Financials sections of the FAFSA form have been revised. Additionally, the questions have been updated for those using the IRS DRT as follows:

- The answer to “Did your parent file a Schedule 1 with the IRS Form 1040?” in the Parent Financials section, and the answer to “Did you file a Schedule 1 with the IRS Form 1040?” in the Student Financials section can now be transferred by the IRS if the user utilizes the IRS DRT.
- Once the user uses the IRS DRT successfully, the “Filed a Schedule 1?” questions will not appear in Student Applications/Renewals or Student Corrections.

For users who use the IRS DRT, the transferred answer for Schedule 1 will be masked on the FAFSA Summary, eSAR, and the Application Summary Report. In these locations, instead of the “Filed a Schedule 1?” entry fields, students and parents will see the words “Transferred from the IRS.”

For those who do not use the IRS DRT, the help topics connected to the “Student Filed Schedule 1?” and “Parent Filed Schedule 1?” questions have been updated to include all current exceptions for filing a Schedule 1. “Capital Gains” has been removed as an exception, and “Virtual Currency” has been added. These help text updates are in effect for the 2021-2022 cycle—“Capital Gains” is still considered an exception for the 2020-2021 cycle.

2021-2022 myStudentAid Mobile App Changes and Enhancements

Federal Student Aid is releasing a new version of the myStudentAid mobile app, which will remain available through the Apple App Store (iOS) and Google Play (Android). The updated app will provide the following functionality:

- FAFSA[®] Form – Complete the FAFSA form safely and securely from your mobile device.
- Dashboard – Access various types of popular tasks and a personalized page to help you determine what actions to take.
- Settings – Edit/manage your account, using your username and password (FSA ID).
- Aid Summary – View your federal student loan and grant history.
- Notification Center – View and manage notifications regarding your student aid.
- Payment Vehicle Account (PVA) – Opt to receive financial aid refunds and manage other finances through a prepaid debit card. Available at select schools during pilot phase of program.

This section of the guide will cover changes and enhancements to the mobile app beginning with the October 1, 2020, system start-up.

Schedule 1 Question Update

The Schedule 1 question and associated help text that appear in the Parent Financials and Student Financials sections of the FAFSA form have been revised. Additionally, the questions have been updated for those using the IRS DRT as follows:

- The answer to the “Did your parent file a Schedule 1 with the IRS Form 1040?” in the Parent Financials section, and the answer to “Did you file a Schedule 1 with the IRS Form 1040?” in the Student Financials section can now be transferred by the IRS if the user utilizes the IRS DRT.
- Once the user uses the IRS DRT successfully, when they navigate to either of these question views, they will see “Transferred from IRS” in the answer fields and they will be uneditable to myStudentAid app users. The fields will still be editable on FAA Access.

For users who use the IRS DRT, the transferred answer for Schedule 1 will be masked on the question itself, as well as on the FAFSA Summary and SAR.

Household Information Updates

We have revised the household information portions of section 3 and section 4 with changes to the way a user can provide household information, the presentation of the household size totals, as well as the wording of the “Number in College” question.

The updates in Section 3 for the student household information are as follows:

- If a user selects “Yes” to whether the student has children who receive more than half their support from them, they will be prompted on the next view to enter the number of children. The same occurs if a user selects “Yes” to the other dependents question.
- The user will then be able to navigate to the Household Information view where they will see a numerical breakdown of the student’s household in a table, including their spouse, their children and other dependents, and the total household size.
- On this view, they will also see the “Number in College” question with updated formatting: “Out of the *[sum of dependents]* people in your household (as indicated above), how many will be in college in 2021-22? Include yourself in this number.”

The updates in Section 4 for the parent household information are as follows:

- The user will be able to enter the number of the parent’s children on one view, followed by the parent’s other dependents on a separate view.
- The user will be able to navigate to the Parent Household Information view to see a numerical breakdown of the parent’s household size in a table, including the parent(s), the student, the parent(s)’s children and other dependents, and the total household size.
- The number in college question will display below the Household Information table and will read: “Out of the *[sum of dependents]* people in your parent’s household (as indicated above), how many will be in college in 2021-22? **Do not include** your parent.”

FAFSA Navigation

The navigation to get to the FAFSA form once within the app has been updated to the following:

- The user will log in to the entire app first and then land on their Dashboard. From there, the user can select the FAFSA from their Dashboard options to navigate to the form.
- Alternatively, once the user has logged in to the app, they can navigate to the form by selecting the FAFSA option in the hamburger menu.

In addition, the FAFSA-specific navigation in the app now appears as a separate menu when a user enters their FAFSA form.

- Once the user is within their FAFSA form, they can select the “Menu” option in the bottom right-hand corner of the screen to reveal the local navigation options.
 - Minor changes to the local navigation include “FAFSA Summary” being renamed “Review FAFSA,” and “Exit FAFSA” will now take the user to their Dashboard.

2021-2022 FAFSA® Form and FAFSA on the Web Worksheet Availability

FAFSA® Form

While most applicants file the FAFSA electronically, a paper application option is still available. The FAFSA form has ten pages (six application pages and four instructional pages) and is used to apply for Title IV aid. The FAFSA form is available as a screen-fillable PDF document that can be printed and submitted by postal mail.

The PDF FAFSA form is an official FAFSA form that can be completed on the computer and printed, or it can be printed and completed manually. The printed and signed PDF FAFSA form is mailed to Federal Student Aid for processing or, in some instances, can be delivered to a school, where the student's application data is entered and submitted using FAA Access or third-party software. The signed FAFSA form is stored by the school according to Title IV record retention requirements.

English and Spanish 508-compliant PDF versions of the 2021-2022 FAFSA form will be available online for download in October 2020 from the IFAP Web site. The PDF version of the FAFSA can also be accessed from the "Resources" page at [StudentAid.gov/resources#fafsa](https://studentaid.gov/resources#fafsa).

Applicants and parents can request up to three copies of the paper FAFSA form from the Federal Student Aid Information Center if they are unable to download an online version and print it.

FAFSA on the Web Worksheet

The FAFSA on the Web Worksheet, available in English or Spanish, is a tool that helps applicants prepare for the online application process. The worksheet is an electronic 508-compliant PDF document that presents some of the FAFSA form questions in the order in which they appear on FAFSA on the Web.

The 2021-2022 FAFSA on the Web Worksheets will be available online for download in October 2020 from the IFAP Web site. The PDF version of the worksheet can also be accessed from the "Resources" page at [StudentAid.gov/resources#fafsa](https://studentaid.gov/resources#fafsa).

We recommend you continue to remind applicants and their parents that the worksheet is not a FAFSA form and is not processed as such if submitted.

2021-2022 Paper FAFSA® Form Changes

This section describes changes and enhancements to the 2021-2022 FAFSA form.

We implemented the following changes to the paper FAFSA form:

Global Changes

- **Colors** – The 2021-2022 FAFSA form colors are green (Pantone Matching System [PMS] 390) for student information and purple (PMS 263) for parent information.

The student color of the FAFSA form continues with the four-year color rotation of orange (PMS 156) → green (PMS 390) → blue (PMS 633) → yellow (PMS 108). Purple (PMS 263) continues to be the color for parent information regardless of the year.

Page 1

- **Mailing Addresses** – We updated the FAFSA form mailing address for the 2021-2022 processing cycle.
- **Use Your Tax Return** – We updated the text to reflect the extended IRS deadline due to Covid-19. The instruction now reads, “If you or (your parents) have missed the 2019 tax filing deadline that was extended due to Covid-19, and still need...”

Page 2

- **Privacy Act Statement**
 - The title was updated from “Information on the Privacy Act and use of your Social Security Number” to “FAFSA® Privacy Act Statement.”
 - The content in the “FAFSA® Privacy Act Statement” section was revised.

Page 4

- **Question 35** – We revised the question to update exclusions for answering “No.” The question now reads, “Did (or will) you file a Schedule 1 with your 2019 tax return? Answer ‘No’ if you did not file a Schedule 1 or **only filed** a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency. **See Notes page 9.**”

Page 6

- **Revised Wording of Instructions for Questions 79-92** – Because of limited space, we updated the instructions to read, “If your answer to question 58 was ‘Unmarried and both legal parents living together,’ contact 1-800-433-3243 for help with questions 79-92.”

- **Question 82** – Adjusted the formatting of the question and revised the text to read, “Did (or will) your parents file a Schedule 1 with their 2019 tax return? Answer ‘**No**’ if they did not file a Schedule 1 or **only filed** a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency. **See Notes page 9.**”

Page 9

- **Notes for questions 35 (page 4) and 82 (page 6)** – We updated the notes to revise the exceptions in the second “Answer ‘No’” paragraph as follows:

Answer “**No**” if you (and if married, your spouse) did or will file a Schedule 1 to report **only one or more** of the following items:

1. Unemployment compensation (line 7)
2. Other income to report an Alaska Permanent Fund dividend (line 8 – may not be a negative value)
3. Educator expenses (line 10)
4. IRA deduction (line 19)
5. Student loan interest deduction (line 20)
6. Receiving, selling, sending, exchanging, or otherwise acquiring any financial interest in any virtual currency

We Value Your Comments and Suggestions!

Federal Student Aid continually seeks new and innovative ways to make applying for financial aid easier and more convenient for applicants and their parents. Some of the changes we made to the paper FAFSA and Web applications were the result of feedback and comments we received from you. As always, we appreciate your contributions to improving our systems and processes and encourage you to continue to share your suggestions with us. We are particularly interested in ways to continue simplifying the paper and online FAFSA form by eliminating unnecessary data collection.

We encourage you to watch the IFAP Web site in 2021, when we will post an announcement regarding the 2022-2023 FAFSA form.

Summary of Changes to FAA Access to CPS Online

Enrollment Requirements

FAA Access to CPS Online

To ensure your school can take full advantage of 2021-2022 enhancements at the beginning of the processing cycle, the Primary Destination Point Administrator (DPA) of the TG Number used to send and receive FAFSA and ISIR correction data should verify your FAA Access enrollment status.

Note: If your school enrolled for 2020-2021, your enrollment carries over to 2021-2022.

Annually, your school's Primary DPA is required to actively confirm the FAA Access to CPS Online services and users associated with your school's TG Number. If you do not perform this confirmation when requested by Federal Student Aid, your staff's rights for FAA Access could be revoked, resulting in a "Primary DPA Validation Needed" error message when staff members attempt to access the site. We encourage you to monitor the IFAP Web site regularly for electronic announcements regarding active confirmation requirements.

If your school is not enrolled for CPS Online services, your school's Primary DPA can complete the enrollment for FAA Access to CPS Online services for your school through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at fsawebenroll.ed.gov.

The Primary DPA must print a Federal Student Aid User of Electronic Services Statement to be signed by new users of FAA Access. While you are not required to mail Federal Student Aid User of Electronic Services Statements to Federal Student Aid's Participation Management system, you must retain signed copies at your school in accordance with Title IV retention requirements.

All users of FAA Access (faaaccess.ed.gov) must have an FSA User ID and password. Any FAA Access user at your school who does not have an FSA User ID can acquire one by completing the following steps:

Step 1: Go to the [SAIG Enrollment site](#) and click the "FSA User ID Registration" link on the left side of the home page.

Step 2: Enter the identifying information requested and click "Submit."

Step 3: Follow the remaining steps, which include establishing a password and setting up challenge questions.

During the FSA User ID registration process, the user must verify the e-mail address on the SAIG Enrollment Web site. We will use this e-mail address to send the FSA User ID.

Note: As first explained in a [January 13, 2012 Electronic Announcement](#), we implemented a technology security initiative in 2012 called two-factor authentication (TFA). Through TFA, when logging in to certain Federal Student Aid systems, including the FAA Access to CPS Online Web site, an authorized user is required to use a traditional user ID and password, as well as provide a one-time password (OTP). A registered token device in the physical possession of the user generates the OTP. We completed our phased distribution of tokens and token registration/usage information to schools, and most school users have successfully begun using TFA tokens to access FAA Access to CPS Online. If you have questions about TFA, send an e-mail to TFASupport@ed.gov.

EDEXpress 2021-2022 FAA Access Interface

To access FAA Access through the EDEXpress 2021-2022 interface, you must follow the same enrollment procedures and use the same FSA User ID and password login credentials as you would to access the sites using your Web browser outside of EDEXpress 2021-2022.

You can save your TG Number, school code, and application save/restore password (used for initial applications only) in EDEXpress FAA Access setup (**Tools, Setup, Global, FAA Access**) or enter them each time you connect to FAA Access through the FAFSA and Student Inquiry tabs in EDEXpress. When you select these tabs, you are prompted for your FSA User ID and password, which are not stored in the EDEXpress database and must be entered separately from your TG Number and school code.

FAA Access Application Processing Changes

In this section, we describe 2021-2022 changes in FAA Access. These changes include:

- Schedule 1 Question Changes
- Removal of TTY/TDD Telephone Number

Schedule 1 Question Changes

Updated instructions in Application/Renewal and Corrections

We have updated the help text and the instructions that accompany the “Filed Schedule 1?” questions for students and parents in the FAFSA/Renewal Application and Corrections to include all current exceptions for filing a Schedule 1 as follows:

2021-2022 cycle

- Question 35. Student Filed Schedule 1? Answer **No** if the student and/or their spouse did not file Schedule 1 or only filed Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency.
- Question 82. Parents Filed Schedule 1? Answer **No** if the student’s parents did not file Schedule 1 or only filed Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency.

2020-2021 cycle

- Question 35. Student Filed Schedule 1? Answer **No** if the student and/or their spouse did not file Schedule 1 or only filed Schedule 1 to report: capital gain, unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend.
- Question 82. Parents Filed Schedule 1? Answer **No** if the student’s parents did not file Schedule 1 or only filed Schedule 1 to report: capital gain, unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend.

FAA Corrections and Student Inquiry, ISIR Compare, and eSAR Changes

When users choose to populate their mobile or FAFSA on the Web application via the IRS DRT, the DRT will now automatically answer the question about whether or not they filed a Schedule 1. The answer will be based on all current exceptions for filing a Schedule 1. The transferred data for the Schedule 1 fields will be handled the same as other data transferred using the IRS DRT. In FAA Access Corrections, “Transferred from the IRS” will display next to any field that contains data that a student or parent transferred directly from the IRS while using FAFSA on the Web. This text will only display if information was transferred directly from the IRS Web site and was not changed by the applicant. If any information transferred from the IRS is corrected, the “Transferred from the IRS” text will be removed from all fields.

We added Filed Schedule 1 to the Student IRS Data Field Flags and the Parent IRS Data Field Flags in Student Inquiry, ISIR Compare, and eSAR.

Removal of TTY/TDD Telephone Number

Because of a lack of demand and use, we have removed the CPS/SAIG Technical Help Desk’s TTY/TDD telephone number for the hearing impaired. This number will no longer appear under “Contact Us.” All communications for the hearing impaired will continue to take place via e-mail.

Summary of Changes to the 2021-2022 CPS

Overview

This section describes changes to the following components of the CPS:

- CPS edits
- Need analysis
- Application output sent to students
- SAR comments
- Mailing addresses
- Database matches – For 2021-2022, no changes were made to the edits associated with the current external match agencies.

Information about changes to the ISIR Record Layout is found in the [2021-2022 Electronic Data Exchange \(EDE\) Technical Reference](#), which is available on the IFAP site.

CPS Edits

We changed the year references in data element field titles, changed year parameters in our edits by one year, and revised edits for requirement changes, such as FAFSA form field changes, deleted fields, and combined fields. We also updated data element field numbers to reflect data element changes, including new field values and question name changes.

There were no other notable changes to the edits for 2021-2022.

Need Analysis

We updated the need analysis offsets and income protection allowances (IPAs) based on legislative changes. The methodology for determining the EFC is found in Part F of Title IV of the Higher Education Act of 1965, as amended.

The income threshold for an automatic zero EFC increased from \$26,000 to \$27,000 for the 2021-2022 award year.

See the [June 5, 2020 Federal Register notice](#) posted on the IFAP Web site for changes to the 2021-2022 need analysis tables. You can also consult the [2021-2022 EFC Formula Guide](#) for more information.

Application Output Sent to Students

For each transaction processed at the CPS, an output document is sent to the applicant: a paper SAR, SAR Acknowledgement, or an E-mail Notification of SAR Processing with information to access SAR data on the Web.

- **SAR** – This document notifies the student of application and eligibility status and provides a paper-based means for correcting or confirming application data. Applicants can also request a SAR by calling FSAIC. A SAR can also be printed from the myStudentAid mobile application.
- **SAR Acknowledgement** – This document notifies the student of application and eligibility status; however, if corrections are needed, the applicant uses FAFSA on the Web or may request that the school submit corrections through FAA Access or a mainframe system.
- **E-mail Notification of SAR Processing** – This e-mail notifies the student of application and eligibility status more quickly than the paper SAR or the SAR Acknowledgement. The applicant can view the SAR online and print the online SAR document as often as needed. The e-mail includes a link to the FAFSA on the Web Login page, where the applicant, after his or her identity is authenticated, can view and print the SAR.

For more information on how the CPS determines the type of output document sent to applicants, see Appendix D of the [2021-2022 ISIR Guide](#), which can be downloaded from the IFAP Web site.

Each year, we make annual rollover changes, such as updating the cycle year references, deadline dates, question/item numbers, question text and responses, tax lines, and P.O. Box numbers.

Paper SAR and SAR Acknowledgement Changes

We have made the following changes to the text printed on the SAR or SAR Acknowledgement:

- **Color** – Paper 2021-2022 SARs and SAR Acknowledgements are printed on green paper to match the color scheme of the 2021-2022 paper FAFSA form.
- **Pell Amount Label Updated** – The Pell amount that displays on page 1 of the SAR and SAR Acknowledgements has been updated to indicate the maximum Pell amount for 2020-2021 on both English and Spanish.
- **Schedule 1 fields** – If the data is transferred from the IRS DRT, the Schedule 1 fields will be masked.

SAR Comments

SAR comments appear on SARs that we mail to applicants and on eSARs that applicants view on FAFSA on the Web. The comment codes are printed on the ISIR report from EDEXpress. In addition to the SAR/ISIR comments, there are FAFSA on the Web and myStudentAid mobile app versions of comments that are worded slightly differently than the SAR/ISIR comments to reflect the Web or mobile app, respectively. New this year, we are adding the myStudentAid mobile application comments to the 2021-2022 SAR Comment Codes and Text guide. Next year the FAFSA on the Web comments will be updated to match the mobile application comments.

Each year we make annual rollover changes, such as updating year references, item numbers, and deadline dates. We also revise agency names and update mailing addresses and phone numbers where necessary. There were no significant changes to the comment text.

For a full listing of the 2021-2022 SAR and ISIR and myStudentAid mobile application comment code text and a description of changes to comment text, see the [2021-2022 SAR Comment Codes and Text](#) guide.

Mailing Addresses

Document	Mailing Address
FAFSA form English and Spanish (including Pacific Islanders)	Federal Student Aid Programs P.O. Box 7654 London, KY 40742-7654
Student Aid Report (SAR) English and Spanish	Federal Student Aid Programs P.O. Box 7655 London, KY 40742-7655
FAFSA on the Web Signature Pages English and Spanish (including corrections)	Federal Student Aid Programs P.O. Box 7656 London, KY 40742-7656

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

E-mail: CPSSAIG@ed.gov

Federal Student Aid maintains this call center to address questions about CPS processing, the FAA Access to CPS Online Web site, the CPS Web Applications Demonstration Web site, PC software such as EDEXpress and EDconnect, SAIG enrollment, and data transmissions, as well as to collect system enhancement suggestions.

Representatives are available Monday through Friday, 8 A.M. to 8 P.M. Eastern Time (ET).

Federal Student Aid Information Center (FSAIC)

800/4-FED-AID (800/433-3243); 334/523-2691; or TDD/TTY 800/730-8913

E-mail: StudentAidHelp@ed.gov

FSAIC serves the public with information about the federal student aid application process. FSAIC customer service representative support is provided in English and Spanish and includes a toll-free telephone number, interactive voice response unit (IVRU) self-service, e-mail, and Live Help. Customers include students, parents, and FAAs seeking general information about federal grant and loan programs, assistance with the FAFSA form (paper and FAFSA on the Web versions, including FSA ID assistance), and student aid processing timeframes.

FSAIC also assists with FAFSA form completion and corrections, application status checks, requests to change addresses and federal school codes on the FAFSA form, duplicate SAR requests, identification of loan holders (including contact information), and Federal Student Aid publication fulfillment.

For FSAIC's hours of operation, including weekend and holiday hours, visit the StudentAid.gov Web site at StudentAid.gov/help-center/contact.

Reach FSA

855/FSA-4-FAA (855/372-4322)

This phone number provides a simplified way for the financial aid community to access these Federal Student Aid (FSA) School Contact Centers:

- COD School Relations Center
- CPS/SAIG Technical Support
- eZ-Audit Help Desk
- Foreign Schools Participation Division
- G5 Hotline
- NSLDS Customer Support Center
- Nelnet Total and Permanent Disability Servicer
- School Eligibility Service Group

Note: You can also continue to use the specific phone number for each contact center.

CPS Web Applications Demo System

Demonstration versions of the FAFSA on the Web and FAA Access to CPS Online Web sites are available through the CPS Web Applications Demo System, a training tool for students, parents, and your financial aid staff.

This demo system offers most of the features of the production Web sites for FAFSA on the Web (for example, completing and submitting FAFSA forms) and FAA Access (for example, requesting ISIRs) and is preloaded with test data for your use.

The demonstration system can be accessed at fafsademotest.ed.gov, and the 2021-2022 options will be available for use on September 30, 2020.

Users can access the current and prior cycle's versions of our Web sites in the demonstration system. For the FAFSA on the Web feature, we display a tab for the previous cycle on the "My FAFSA" page. Preloaded demonstration data will be available for both cycles.

To access specific functions within the FAA Access to CPS Online, you need a destination code and a Federal School Code.

- For the Destination Code, type: **TG99999**
- For the Federal School Code, type: **001002**

Other Helpful Documents

We encourage you to review other documents on the [IFAP](#) Web site for more information about changes to the 2021-2022 application processing system. Unless noted otherwise, all documents are available from the IFAP Web site:

- [2021-2022 Application Processing System Specifications for Software Developers](#), June 18, 2020: Provides CPS system edits that can assist you in designing or building your own software to communicate with Federal Student Aid. A final version will be posted in October 2021.
- [2021-2022 CPS Test System User Guide](#), June 18, 2020: Describes Federal Student Aid's CPS Test System and the testing process and provides testing instructions for the mainframe test environment, as well as instructions for using the CPS Web Applications Demonstration (Web Demo) System.
- [2021-2022 FAFSA MyStudentData Download](#) guide, July 1, 2020: Describes the FAFSA MyStudentData Download file structure, including record layout and valid values.
- [2021-2022 Electronic Data Exchange \(EDE\) Technical Reference](#), June 3, 2020: Describes the 2021-2022 EDE process and provides programmer specifications and information that can assist you in building your own software to complement or replace the EDEExpress software that is used to exchange data electronically with Federal Student Aid.
- [2021-2022 SAR Comment Codes and Text](#), July 21, 2020: Describes changes to the SAR comment codes and associated text for 2021-2022 and database match information.
- [2021-2022 ISIR Guide](#), July 14, 2020: Provides in-depth information regarding the 2021-2022 ISIR.
- [2021-2022 EFC Formula Guide](#): Provides worksheets and tables that can be used to calculate an estimated EFC for students.
- [2021-2022 FAFSA.gov Preview Presentation](#), September 1, 2020: Microsoft PowerPoint presentation containing information and screen shots pertaining to the 2021-2022 FAFSA on the Web site.
- [2021-2022 myStudentAid Mobile Application Preview Presentation](#), September 1, 2020: Microsoft PowerPoint presentation containing information and screen shots pertaining to the 2021-2022 myStudentAid mobile application.
- [SAVE System Instructions for US Department of Education \(School\) Users](#): Provides instructions to FAAs on setting up access to the DHS SAVE system for submitting third-step verification electronically.
- [Federal Student Aid Handbook](#): The Federal Student Aid Handbook consists of the Application and Verification Guide, six numbered volumes, and appendices.
- English and Spanish versions of the FAFSA form and FAFSA instructions will be available in October 2020 for download from StudentAid.gov/resources#fafsa or ifap.ed.gov/ifap/processing/fafsaAndSARMaterialsPR.jsp.

- English and Spanish versions of the draft SAR and SAR Acknowledgement will be available in October 2020 for download from ifap.ed.gov/ilibrary/document-types/fafsa-and-sar-materials.
- English and Spanish versions of the 2021-2022 [Student Aid Eligibility Worksheet](#) will be available in October 2020.
- English and Spanish versions of the 2021-2022 FAFSA on the Web Worksheet will be available for download in October 2020 from [FAFSA on the Web](#).

Federal Student Aid Web Sites

- Common Origination and Disbursement (COD): cod.ed.gov
 - R2T4
- CPS Web Applications Demo System: fafsademo.test.ed.gov
- DHS/SAVE IFAP information: ifap.ed.gov/dhs-save-eligible-noncitizen-dhs-save-electronic-third-step-verification
- FAA Access to CPS Online: faaaccess.ed.gov
- FAFSA on the Web: fafsa.gov
- Federal Student Aid Training Conference Web site: fsaconferences.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
- National Student Loan Data System (NSLDS) Professional Access Web site: nsldsfap.ed.gov
- Student Aid.gov: StudentAid.gov
 - FSA ID: StudentAid.gov/fsa-id
- Student Aid Internet Gateway (SAIG) Enrollment: fsawebenroll.ed.gov
- Training information and registration Web site for upcoming Fundamentals of Federal Student Aid Administration training opportunities and learning resources: fsatraining.ed.gov