

**U.S. Department of Education**



**F E D E R A L**  
**S T U D E N T A I D**

**SPECIFICATIONS FOR SOFTWARE DEVELOPERS**

**ACADEMIC YEAR 2007-2008**

**DRAFT**  
**VERSION 1.0**

**August 15, 2006**

## Summary of Updates

<b>Revision Date</b>	<b>Changes</b>
08/15/2006	Draft specifications issued.

The processing edits included in this specification package have been developed using a priority processing logic. Some steps in the process are contingent upon or use data from previous steps. It is therefore necessary that the processing edits be performed in the sequence in which they are presented in these specifications. That sequence is as follows:

1. Valid Field Definitions (11 pages)
2. Model Determination (5 pages)
3. Complete Assumptions (13 pages)
4. Simplified Needs Test (5 pages)
5. Complete Reject Edits (13 pages)
6. Determination of Formula Type (4 pages)
7. Expected Family Contribution Formula Calculation (43 pages)
8. Alternate EFC Calculations (6 pages)

All edits or formula steps that are additions or revisions to the prior year's specifications have been marked with an exclamation mark (!) next to the edit number, step, or field.

All values that are variables, and subject to change during the year, are marked with an @.

Unless otherwise specified, all calculations should be carried to 3 decimal places and then rounded to the nearest whole number (upward from .500 and downward from .499).

For example, 4.500 would be rounded to 5; 4.499 would be rounded to 4; -4.500 would be rounded to -5.

Do not process applications dated prior to 1/1/2007.

The Department of Education will provide a test file for use by each servicer in self-testing of their system. Expected results will be included on the file for 100% of the test cases. The Department is not testing or certifying systems for 2007-2008 and therefore will not accept test results for review.

The test data will be provided in Social Security Number (SSN) order and in the 2007-2008 Institutional Student Information Record (ISIR) format. The ISIR record layout is included in the Appendix following the specifications.

If you have questions related to the specifications package or the test data, please contact Teri Hunt, ORC Macro International, at Teri.Hunt@orcmacro.com or at (301) 572-0263.

For the 2007-2008 cycle, there are several significant changes to the specifications. All changes to edits, text or formula steps are marked with an exclamation mark (!). All tables in the formulas have been updated to account for inflation. The following is a general summary of the substantive changes that have been made to each section of the specifications.

### Valid Field Definitions

- The following data elements were deleted:
  - Interested in Student Loans
  - Interested in Work Study
- The following data elements were added:
  - Type of Aid Interested in Receiving
  - Active Military Duty
  - Student/Parent SSI
  - Student/Parent Food Stamps
  - Student/Parent Free/Reduced Price Lunch
  - Student/Parent TANF
  - Student/Parent WIC
- Fields were reordered and renumbered to match the FAFSA.
- Date Fields incremented.

### Model Determination

- Dates have been updated in the applicable edits.
- Active Duty Military question added to independent edit (1014).

### Complete Assumptions

- No changes have been made to the Complete Assumption edits.

### Simplified Needs Test

- Edits added to use new means-tested federal benefit questions (3001, 3005, 3009, 3013, 3017). Subsequent edits renumbered.

### Complete Reject Edits

- Dates incremented in rejects A and B.

### Formula Calculations

- STX rate revised for AR, MO, and OR for parents of dependent students and independent students with dependents.
- STX rate revised for CA, IN, HI, ME, and UT for dependent students and independent students without dependents.
- SST, IPA, EA, ANW, APA, and AAI rates and tables updated.
- Asset conversion rate updated for independent and dependent students.
- Alternate EFC adjustment updated.

## 2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
01 Last Name	16	Blank or Valid characters for name: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash)	If non-blank, first character must be A through Z and second character must be non-numeric. Correct by left justifying last name if present.
02 First Name	12	Blank or characters listed above.	Correct by replacing first name as it appears on application or set to blank. Left justify. If non-blank, first character must be A through Z.
03 Middle Initial	1	Blank or Alpha (A-Z).	Correct by replacing middle initial as it appears on application or set to blank. Left justify.
04 Street Address (student permanent mailing address)	35	Blank or valid characters for address: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash) / (slash) # (number) @ (at) % (percent or care of) & (ampersand) , (comma)	For street address and city: Set non-valid characters to blank. Left justify.
05 City (student permanent mailing address)	16	Blank or characters listed above.	Left Justify
06 Mailing State (mailing address)	2	Blank or valid alpha postal code. For specific State codes, see list that follows these edits.	If numeric, invalid, or illegible, set to blank.
07 Zip Code	5	All blank or all numeric; 00000-99999.	
08 Social Security Number	9	All numeric (except all zeroes). 001-01-0001 - 999-99-9999	
09 Date of Birth	8	All blank or all numeric in CCYYMMDD format where MM = 01-12, DD = 01-31, CC = 19, YY = 00-99.	Set DOB to blank if month, day, century or year is blank, illegible, or invalid.
10 Student's Permanent Telephone Number	10	All blank or all numeric; 0000000000-9999999999	If less than 10 digits, invalid, or illegible, set to blank.
11 Student's Driver's License Number	20	All blank or valid characters: Alpha/numeric (A-Z) (0-9)	If less than 20 characters, left justify. Set invalid characters to blank.

2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
		- (dash), or * (asterisk)	
12 Student's Driver's License State	2	Blank or valid alpha postal code. For specific State codes, see list that follows these edits.	If blank, numeric, invalid, or illegible, set to blank.
13 Student's E-Mail Address	50	0-9, Uppercase A to Z, Lowercase a to z, Space, Period, Apostrophe, Dash, Number Sign, At Sign, Percent, Ampersand, Slash, Comma, Underscore, Blank	
14 Citizenship	1	Blank, 1, 2, or 3. 1 = U. S. Citizen 2 = Eligible non-citizen 3 = Neither 1 or 2	Set multiple responses to blank.
15 Alien Registration Number	9	Blank or 000000001 - 999999999.	If number is less than 7 digits or greater than 9 digits, set it to blank. If number is 7 digits, add two preceding zeroes. If number is 8 digits, add one preceding zero. Set 000000000 to blank.
16 Student's Marital Status	1	Blank, 1, 2 or 3. 1 = (unmarried (single, divorced,widowed)) 2 = (married/remarried) 3 = (separated)	Set multiple response to blank.
! 17 Student's Marital Status Date	6	190001-200812 All blank or all numeric in CCYYMM format where MM = 01-12, CC = 19-20, YY = 00-99.	Set to blank if month, century or year is blank, illegible, or invalid.
18 Student's State of Legal Residence	2	Blank or valid two letter postal code. See attached list.	If numeric, invalid, or illegible, set to blank.
19 Student Legal Resident Before 1/1/02	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 20 Student's Legal Residence Date	6	190001-200812 All blank or all numeric in CCYYMM format where MM = 01-12, CC = 19-20, YY = 00-99.	Set to blank if month, century or year is blank, illegible, or invalid.
21 Are You Male	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
22 Selective Service Registration	1	Blank, 1 or 2.	Set multiple responses to blank.

## 2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

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08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
23 Degree/Certificate	1	1 = Yes 2 = No Blank, 1-9. For specific codes see list that follows these edits.	Set multiple responses to blank.
24 Grade Level in College	1	Blank, 0, 1, 2, 3, 4, 5, 6 or 7. 0 = 1st, never attended 1 = 1st, attended before 2 = 2nd year/sophomore 3 = 3rd year/junior 4 = 4th year/senior 5 = 5th year or more undergraduate 6 = 1st year graduate/professional 7 = continuing graduate/professional	Set multiple responses to blank.
25 Enrollment Status	1	Blank, 1-5. 1 = Full time 2 = $\frac{3}{4}$ time 3 = $\frac{1}{2}$ time 4 = Less than $\frac{1}{2}$ time 5 = Don't Know	Set multiple responses to blank.
! 26 Types of Aid Interested in Receiving	1	Blank, 1, 2, 3, 4, or 5 1 = Work Study 2 = Loans 3 = Both Work Study and Loans 4 = Neither 5 = Don't Know	Set multiple responses to blank.
27 High School Diploma or GED Received	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
28 Bachelor's Degree	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
29 Father's Highest Educational Level	1	Blank, 1, 2, 3, or 4. 1 = Middle School/Jr. High 2 = High School 3 = College or beyond 4 = Unknown	Set multiple responses to blank.
30 Mother's Highest Educational Level	1	Blank, 1, 2, 3, or 4.	Set multiple responses to blank.



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FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
		1 = Middle School/Jr. High 2 = High School 3 = College or beyond 4 = Unknown	
31 Drug Conviction Affecting Eligibility	1	Blank, 1, 2, or 3 1 = Eligible for aid 2 = Part-year Eligibility 3 = Ineligible/Don't Know	
32 Student's Tax Return Status	1	Blank, 1, 2, or 3. 1 = Already completed 2 = Will file 3 = Will not file	Set multiple responses to blank.
33 Student's Type of Tax Return	1	Blank, 1, 2, 3 or 4 1 = 1040 2 = 1040A/EZ 3 = Foreign tax return 4 = Trust Territory tax return	Set multiple responses to blank.
34 Student Eligible for 1040A/EZ	1	Blank, 1, 2, or 3 1 = Yes 2 = No 3 = Don't know	Set multiple responses to blank.
35 Student's AGI	6	Blank or -999999 - 999999.	
36 Student's Taxes Paid	5	Blank or 00000 - 99999.	Set to positive if negative is given.
37 Student's Exemptions	2	Blank or 00 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
38 Student's Income	6	Blank or -999999 - 999999.	
39 Spouse's Income	6	Blank or -999999 - 999999.	
40 Student's Income from Worksheet A	5	Blank or 00000 - 99999.	Set to positive if negative is given.
41 Student's Income from Worksheet B	5	Blank or 00000 - 99999.	Set to positive if negative is given.
42 Student's Income from Worksheet C	5	Blank or 00000 - 99999.	Set to positive if negative is given.
43 Student's Cash, Savings, and Checking	6	Blank or 000000 - 999999.	Set to positive if negative is given.

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FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
44 Student's Real Estate/Investment Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
45 Student's Business/Farm Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
46 Veteran's Benefits Months	2	Blank or 00 - 12.	If greater than 12, set to 12.
47 Veteran's Benefits Amount	4	Blank or 0000 - 9999.	
48 Born Before 1/1/84	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
49 Graduate or Professional Student	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
50 Is Student Married	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
51 Do You Have Children	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
52 Dependents Other Than Children/ Spouse	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
53 Orphan or Ward of the Court	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 54 Active Duty Military	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
55 Veteran Status	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
56 Parents' Marital Status	1	Blank, 1, 2, 3 or 4 1 = (married/remarried)	Set multiple responses to blank.

2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES		
!	57	Parents' Marital Status Date	6	190001-200812 All blank or all numeric in CCYYMM format where MM = 01-12, CC = 19-20, YY = 00-99.	2 = (single) 3 = (separated/divorced) 4 = (widowed) Set to blank if month, century or year is blank, illegible, or invalid.
	58	Father's SSN	9	Blank or all numeric 000-00-0000 - 999-99-9999	
	59	Father's Last Name	16	Blank or Valid characters for name: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash)	If non-blank, first position must be A through Z. Correct by left justifying last name if present.
	60	Father's First Initial	1	Blank or Alpha (A-Z).	
	61	Father's Date of Birth	8	19000101-19991231 All blank or all numeric in CCYYMMDD format where MM = 01-12, DD = 01-31, CC = 19, YY = 00-99.	Set DOB to blank if month, day, century or year is blank, illegible, or invalid.
	62	Mother's SSN	9	Blank or all numeric 000-00-0000 - 999-99-9999	
	63	Mother's Last Name	16	Blank or Valid characters for name: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash)	If non-blank, first position must be A through Z. Correct by left justifying last name if present.
	64	Mother's First Initial	1	Blank or Alpha (A-Z).	
	65	Mother's Date of Birth	8	19000101-19991231 All blank or all numeric in CCYYMMDD format where MM = 01-12, DD = 01-31, CC = 19, YY = 00-99.	Set DOB to blank if month, day, century or year is blank, illegible, or invalid.
	66	Parents' Number of Family Members	2	Blank or 00 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
	67	Parents' Number in College	1	Blank or 0 - 9.	Set to positive if negative is given. If greater than 9, set to 9.

## 2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

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08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
68 Parents' State of Legal Residence	2	Blank or valid two letter postal code. For specific State codes, see list that follows these edits.	Determine from application.
69 Parents Legal Residents Before 1/1/02	1	Blank, 1 or 2.	Set multiple responses to blank.
! 70 Parents' Legal Residence Date	6	190001-200812 All blank or all numeric in CCYYMM format where MM = 01-12, CC= 19-20, YY = 00-99.	Set to blank if month, century or year is blank, illegible or invalid.
! 71 Parents' SSI Benefits	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 72 Parents' Food Stamps	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 73 Parents' Free/Reduced Price Lunch	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 74 Parents' TANF Benefits	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 75 Parents' WIC Benefits	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
76 Parents' Tax Return Status	1	Blank, 1, 2 or 3. 1 = Already completed 2 = Will file 3 = Will not file	Set multiple responses to blank.
77 Parents' Type of Tax Return	1	Blank, 1, 2, 3 or 4 1 = 1040 2 = 1040A/EZ 3 = Foreign tax return 4 = Trust Territory tax return	Set multiple responses to blank.
78 Parents' Eligible for 1040A/EZ	1	Blank, 1, 2, or 3 1 = Yes 2 = No 3 = Don't know	Set multiple responses to blank.

2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
79 Parents' AGI	6	Blank or -999999 - 999999.	
80 Parents' Taxes Paid	6	Blank or 000000 - 999999.	Set to positive if negative is given.
81 Parents' Exemptions	2	Blank or 00 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
82 Father's Income	6	Blank or -999999 - 999999.	
83 Mother's Income	6	Blank or -999999 - 999999.	
84 Parents' Income From Worksheet A	5	Blank or 00000 - 99999.	Set to positive if negative is given.
85 Parents' Income From Worksheet B	5	Blank or 00000 - 99999.	Set to positive if negative is given.
86 Parents' Income From Worksheet C	5	Blank or 00000 - 99999.	Set to positive if negative is given.
87 Parents' Cash, Savings, and Checking	6	Blank or 000000 - 999999.	Set to positive if negative is given.
88 Parents' Real Estate/Investment Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
89 Parents' Business/Farm Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
90 Student's Number of Family Members	2	Blank or 01 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
91 Student's Number in College	1	Blank or 1 - 9.	Set to positive if negative is given. If greater than 9, set to 9.
! 92 Student's SSI Benefits	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 93 Student's Food Stamps	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 94 Student's Free/Reduced Price Lunch	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
! 95 Student's TANF Benefits	1	Blank, 1 or 2. 1 = Yes	Set multiple responses to blank.

2007-2008 VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2006

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES	
!	96 Student's WIC Benefits	1	2 = No Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
	97.a College Choices 97.c 97.e 97.g 97.i 97.k	6	Blank or 000000-099999. 0, B, E, and G valid for 1 <sup>st</sup> position.	
	97.b HousingStatus 97.d 97.f 97.h 97.j 97.l	1	Blank, 1-3. 1 = On-Campus 2 = Off-Campus 3 = With Parent	
!	98 Date Completed	8	20070101-20081231 Blank or all numeric in CCYYMMDD format, where MM = 01-12, DD = 01-31, CC = 20, YY = 07-08.	Set to blank if multiple responses checked in year.
	99 Signed By	1	Blank, A, P or B. A = Signed by Applicant P = Signed by Parent B = Signed by Applicant and Parent	Determine from application.

FORMAT INSTRUCTIONS

Key only the dollar amount of any financial field, subject to right justify and left zero fill.

Set to negative nines (-99999) when a negative amount is given that is larger than what the field allows.

Set to positive nines (99999) when a positive amount is given that is larger than what the field allows.

## STATE CODES

ALABAMA	AL	NEVADA	NV
ALASKA	AK	NEW BRUNSWICK	NB
ALBERTA	AB	NEWFOUNDLAND	NF
AMERICAN SAMOA	AS	NEW HAMPSHIRE	NH
ARIZONA	AZ	NEW JERSEY	NJ
ARKANSAS	AR	NEWFOUNDLAND/LABRADOR	NL
BRITISH COLUMBIA	BC	NEW MEXICO	NM
CALIFORNIA	CA	NUNAVUT	NU
CANADA	CN	NEW YORK	NY
COLORADO	CO	NORTH CAROLINA	NC
CONNECTICUT	CT	NORTH DAKOTA	ND
DELAWARE	DE	NORTHERN MARIANAS	MP
DISTRICT OF COLUMBIA	DC	NORTHWEST TERRITORIES	NT
FEDERATED STATES OF MICRONESIA	FM	NOVA SCOTIA	NS
FLORIDA	FL	OHIO	OH
FOREIGN COUNTRY	FC	OKLAHOMA	OK
GEORGIA	GA	ONTARIO	ON
GUAM	GU	OREGON	OR
HAWAII	HI	PENNSYLVANIA	PA
IDAHO	ID	PRINCE EDWARD ISLAND	PE
ILLINOIS	IL	PUERTO RICO	PR
INDIANA	IN	QUEBEC	PQ, QC
IOWA	IA	REPUBLIC OF PALAU	PW
KANSAS	KS	RHODE ISLAND	RI
KENTUCKY	KY	SASKATCHEWAN	SK
LOUISIANA	LA	SOUTH CAROLINA	SC
MAINE	ME	SOUTH DAKOTA	SD
MANITOBA	MB	TENNESSEE	TN
MARSHALL ISLAND	MH	TEXAS	TX
MARYLAND	MD	UTAH	UT
MASSACHUSETTS	MA	VERMONT	VT
MEXICO	MX	VIRGIN ISLANDS	VI
MICHIGAN	MI	VIRGINIA	VA
* MILITARY LOCATIONS:	AA	WASHINGTON	WA
	AE	WEST VIRGINIA	WV
	AP	WISCONSIN	WI
MINNESOTA	MN	WYOMING	WY
MISSISSIPPI	MS	YUKON	YT
MISSOURI	MO		
MONTANA	MT		
NEBRASKA	NE		

\* Codes are valid for mailing state only.

DEGREE/CERTIFICATE CONVERSIONS

Degree/Certificate Code	Literal
1	1ST BA
2	2ND BA
3	ASSOC. TECHNICAL
4	ASSOC. GENERAL
5	CERT/DIPLOMA
6	CERT/DIPLOMA 2 YR
7	TEACHING
8	GRAD/PROF
9	OTHER/UNDECIDED



## MODEL DETERMINATION

The result of completing the model determination edits is to determine if applicants are dependent on their parents for financial support or if they can be considered independent from their parents. The determination of dependency status is critical to the rest of the application process; therefore, it is essential to perform this step first.

When performing the following edits to determine model, use reported data only. No assumptions should be made except those included in these edits. If multiple responses are given for a data element, set the field to blank.

Invalid date of birth is defined as follows:

- Month is less than 01 or greater than 12
- Day is out of following range:

### Month Valid Day Range

01	01-31
02	01-28 (unless year is divisible by 4 when 01-29 is valid)
03	01-31
04	01-30
05	01-31
06	01-30
07	01-31
08	01-31
09	01-30
10	01-31
11	01-30
12	01-31

Date of Birth year equal to current year is considered valid for these edits.

EDIT 1001 !

Condition: Born Before 1/1/84 is blank or "No", and Date of Birth is not blank or invalid and is less than 1/1/84

Procedure: Assume "Yes" for Born Before 1/1/84.

EDIT 1002 !

Condition: Born Before 1/1/84 is blank or "Yes" and Date of Birth is not blank or invalid and is greater than 12/31/83.

Procedure: Assume "No" for Born Before 1/1/84.

EDIT 1003

Condition: Born Before 1/1/84 is blank, and Date of Birth is blank or invalid.

Procedure: Assume "No" for Born Before 1/1/84.

EDIT 1004

Condition: Is Student Married is blank or "No," and Student's Marital Status is married or separated.

Procedure: Assume Yes for Is Student Married.

EDIT 1005

Condition: Is Student Married is blank or "Yes," and Student's Marital Status is unmarried.

Procedure: Assume No for Is Student Married.

EDIT 1006

Condition: Is Student Married is blank, or "Yes," Student's Marital Status is blank and Student's Number of Family Members is 01 or blank.

Procedure: Assume No for Is Student Married.

EDIT 1007

Condition: Is Student Married is blank, Student's Marital Status is blank, Student's Number of Family Members is 02, Do You Have Children is "No", and Legal Dependents Other Than Children/Spouse is "No."

Procedure: Assume Yes for Is Student Married.

EDIT 1008

Condition: Is Student Married is blank or "Yes," Student's Marital Status is blank, Student's Family Members is 02, and (Do You Have Children is "Yes") or (Legal Dependents Other Than Children/Spouse is "Yes").

Procedure: Assume No for Is Student Married.

EDIT 1009

Condition: Is Student Married is blank or "No," Student's Marital Status is blank, Student's Family Members is 02, Do You Have Children is blank, Legal Dependents Other Than Children/Spouse is blank, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Yes for Is Student Married.

EDIT 1010

Condition: Is Student Married is blank or "Yes," Student's Marital Status is blank, Student's Family Members is 02, Do You Have Children is blank, Legal Dependents Other Than Children/Spouse is blank, and Spouse's Income is blank or zero.

Procedure: Assume No for Is Student Married.

EDIT 1011

Condition: Is Student Married is blank or "No" Student's Marital Status is blank, Student's Family Members is greater than 02, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Yes for Is Student Married.

EDIT 1012

Condition: Is Student Married is blank or "Yes," Student's Marital Status is blank, Student's Family Members is greater than 02, and Spouse's Income is blank or zero.

Procedure: Assume No for Is Student Married.

EDIT 1013

Condition: (Do You Have Children is "Yes") or (Legal Dependents Other Than Children/Spouse is "Yes") and Student's Number Family Members is blank or 1.

Procedure: Assume No for Do You Have Children and/or Legal Dependents Other Than Children/Spouse, whichever field was reported as "Yes".

EDIT 1014 !

Condition: Any one of Born Before 1/1/84, Graduate or Professional Student, Is Student Married, Orphan or Ward, Do You Have Children, Legal Dependents Other Than Children/Spouse, Active Military Duty, or Veteran Status is "Yes".

Procedure: Set application model to Independent.

EDIT 1015

Condition: For records not meeting the above edit.

Procedure: Set application model to Dependent.

EDIT 1016

Condition: Application model is Dependent and Dependency Override code is set to 1.

Procedure: Set application model to Independent.

## COMPLETE ASSUMPTIONS FOR FORMULA CALCULATIONS

Assumption edits should be performed in the order presented below. Once a value has been assumed for a data field, the assumed value should be used for subsequent edits, which use that data field.

### PARENTS' DATA ELEMENTS

#### EDIT 2001

Condition: Parents' Marital Status is blank and Parents' Number of Family Members is 3 or greater.

Procedure: Assume Parents' Marital Status is married.

#### EDIT 2002

Condition: Parents' Marital Status is blank and Parents' Number of Family Members is 2.

Procedure: Assume Parents' Marital Status is single.

#### EDIT 2003

Condition: Parents' Number of Family Members is blank, 1, or 2 and Parents' Marital Status is married.

Procedure: Assume Parents' Number of Family Members is 3.

#### EDIT 2004

Condition: Parents' Number of Family Members is blank or 1 and Parents' Marital Status is single, separated/divorced, or widowed.

Procedure: Assume Parents' Number of Family Members is 2.

EDIT 2005

Condition: Parents' Number in College is blank.

Procedure: Assume Parents' Number in College is 1.

EDIT 2006

Condition: Parents' Number in College is equal to Parents' Number of Family Members, both are greater than 1, and FAA Adjustment Flag is not set to 1.

Procedure: Assume Parents' Number in College is 1.

EDIT 2007

Condition: Parents' Number in College is greater than 6.

Procedure: Assume Parents' Number in College is 1.

EDIT 2008

Condition: Parents' Number in College re-entered as greater than 6 on correction record.

Procedure: Make no assumption for Parents' Number in College.

EDIT 2009

Condition: Parents' Number in College is greater than Parents' Number of Family Members.

Procedure: Assume Parent's Number in College is 1.

EDIT 2010

Condition: Parents' Number in College is greater than Parents' Number of Family Members minus 2, Parents' Marital Status is married, and FAA Adjustment Flag is not set to 1.

Procedure: Assume Parents' Number in College is equal to Parents' Number of Family Members minus 2.

EDIT 2011

Condition: Parents' AGI is blank or zero, ((Parents' Type of Tax Return is non-blank) or (Type of Tax Return is blank and Parents' Tax Return Status is filed or will file)), and Father's Income or Mother's Income is positive or negative.

Procedure: Assume Parents' AGI is equal to sum of Father's Income plus Mother's Income. (If sum of earnings is greater than 6 digits, use 999999 or -999999.)

EDIT 2012

Condition: Parents' AGI is re-entered as zero on a correction record.

Procedure: Make no assumption for Parents' AGI.

EDIT 2013

Condition: Parents' AGI is positive, Parents' Tax Return Status is will not file, and Father's Income and Mother's Income are blank or zero.

Procedure: Assume Father's Income is equal to Parents' AGI.

**Determination of tax filing status:**

EDIT 2014

Condition: Parents' Type of Tax Return is non-blank.

Procedure: Assume parents' tax filing status is tax filer.



EDIT 2015

Condition: Parents' Tax Return Status is filed or will file and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is tax filer.

EDIT 2016

Condition: Parents' AGI is positive or negative, Parents' Tax Return Status is blank, and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is tax filer.

EDIT 2017

Condition: Parents' Tax Return Status is will not file and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is non-tax filer.

EDIT 2018

Condition: Parents' AGI is blank or zero, Parents' Tax Return Status is blank, and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is non-tax filer.

EDIT 2019

Condition: Parents' Taxes Paid is blank and Parents' tax filing status is tax filer.

Procedure: Assume zero for Parents' Taxes Paid.

EDIT 2020

Condition: Father's Income is blank, Mother's Income is blank or zero, and Parents' AGI is non-blank and non-zero.

Procedure: Assume Father's Income equals Parents' AGI.

EDIT 2021

Condition: Mother's Income is blank, Father's Income is zero, and Parents' AGI is non-blank and non-zero.

Procedure: Assume Mother's Income equals Parents' AGI.

EDIT 2022

Condition: Father's Income is negative and parents' tax filing status is non-tax filer.

Procedure: Assume same positive value for Father's Income.

EDIT 2023

Condition: Mother's Income is negative and parents' tax filing status is non-tax filer.

Procedure: Assume same positive value for Mother's Income.

EDIT 2024

Condition: Parents' Income from Worksheet C is greater than zero, and greater than 90% of the sum\* of:  
(Parents' AGI plus Parents' Income from Worksheet A plus Parents' Income from Worksheet B if Parents' Tax Filing Status is tax filer)  
or  
(Father's Income plus Mother's Income plus Parents' Income from Worksheet A plus Parents' Income from Worksheet B if Parents' Tax Filing Status is non-tax filer)

\* use zero if any value in the calculation is negative or blank.

Procedure: Assume zero for Parents' Income from Worksheet C.

EDIT 2025

Condition: Parents' Income from Worksheet C re-entered as greater than 90% of the sum of total income on a correction record.

Procedure: Make no assumption for Parents' Income from Worksheet C.

STUDENT & SPOUSE DATA ELEMENTS

EDIT 2026

Condition: Citizenship is blank and Alien Registration Number is non-blank and valid.

Procedure: Assume Citizenship is eligible non-citizen.

EDIT 2027

Condition: Citizenship is ((blank) or (eligible non-citizen and Alien registration number is blank)) and (SSN Match Flag is 4 and SSA citizenship status code is A or blank).

Procedure: Assume Citizenship is citizen.

EDIT 2028

Condition: Independent, Student's Marital Status is blank, and Student's Number of Family Members is 1.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2029

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, Do You Have Children is "No", and Legal Dependents Other Than Spouse is "No".

Procedure: Assume Student's Marital Status is married.

EDIT 2030

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, (Do You Have Children is "Yes") or (Legal Dependents Other Than Spouse is "Yes").

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2031

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Student's Marital Status is married.

EDIT 2032

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, and Spouse's Income is blank or zero.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2033

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is greater than 2, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Student's Marital Status is married.

EDIT 2034

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is greater than 2, and Spouse's Income is blank or zero.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2035

Condition: Independent, Student's Number of Family Members is blank, and Student's Marital Status is married.

Procedure: Assume Student's Number of Family Members is 2.

EDIT 2036

Condition: Independent, Student's Number of Family Members is blank, and Student's Marital Status is unmarried or separated.

Procedure: Assume Student's Number of Family Members is 1.

EDIT 2037

Condition: Independent, Student's Number of Family Members is 1, Student's Marital Status is married, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Student's Number of Family Members is 2.

EDIT 2038

Condition: Independent, Student's Number of Family Members is greater than 1, Student's Marital Status is not married, Do You Have Children is "No", and Legal Dependents Other Than Spouse is "No".

Procedure: Assume Student's Number of Family Members is 1.

EDIT 2039

Condition: Independent and Student's Number in College is blank.

Procedure: Assume Student's Number in College is 1.

EDIT 2040

Condition: Independent, Student's Number in College is equal to Student's Number of Family Members, and both are greater than 2.

Procedure: Assume Student's Number in College is 1.

EDIT 2041

Condition: Student's Number in College and Student's Number of Family Members re-entered as equal and both greater than 2 on a correction record.

Procedure: Make no assumption for Student's Number in College.

EDIT 2042

Condition: Independent, Student's Number in College is greater than Student's Number of Family Members.

Procedure: Assume Student's Number in College is 1.

EDIT 2043

Condition: Dependent, Student's Marital Status is blank.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2044

Condition: Dependent, Spouse's Income is non-blank and non-zero, and Student's Marital Status is unmarried.

Procedure: Assume zero for Spouse's Income.

EDIT 2045

Condition: Student's AGI is blank or zero, ((Student's Type of Tax Return is non-blank) or (Type of Tax Return is blank and Student's Tax Return Status is filed or will file)), and Student's Income or Spouse's Income is positive or negative.

Procedure: Assume Student's AGI is equal to Student's Income plus Spouse's Income. (If sum of earnings is greater than 6 digits, use 999999 or -999999.)

EDIT 2046

Condition: Student's AGI re-entered as zero on a correction record.

Procedure: Make no assumption for Student's AGI.

EDIT 2047

Condition: Student's AGI is positive, Student's Tax Return Status is will not file, and Student's Income and Spouse's Income are blank or zero.

Procedure: Assume Student's Income is equal to Student's AGI.

**Determination of tax filing status:**

EDIT 2048

Condition: Student's Type of Tax Return is non-blank.

Procedure: Assume student's tax filing status is tax filer.

EDIT 2049

Condition: Student's Tax Return Status is filed or will file and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is tax filer.

EDIT 2050

Condition: Student's AGI is positive or negative, Student's Tax Return Status is blank, and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is tax filer.

EDIT 2051

Condition: Student's Tax Return Status is will not file and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is non-tax filer.

EDIT 2052

Condition: Student's AGI is blank or zero, Student's Tax Return Status is blank, and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is non-tax filer.

EDIT 2053

Condition: Student's Taxes Paid is blank and student's tax filing status is tax filer.

Procedure: Assume zero for Student's Taxes Paid.

EDIT 2054

Condition: Dependent, Student's Income is blank, and Student's AGI is non-blank and non-zero.

Procedure: Assume Student's Income equals Student's AGI.



EDIT 2055

Condition: Independent, Student's Income is blank, Spouse's Income is blank or zero, and Student's AGI is non-blank and non-zero.

Procedure: Assume Student's Income equals Student's AGI.

EDIT 2056

Condition: Student's Income is negative and student's tax filing status is non-tax filer.

Procedure: Assume same positive value for Student's Income.

EDIT 2057

Condition: Independent, Spouse's Income is blank, Student's Income is zero, Student's Marital Status is married, and AGI is non-blank and non-zero.

Procedure: Assume Spouse's Income is equal to AGI.

EDIT 2058

Condition: Independent, Spouse's Income is negative and student's tax filing status is non-tax filer.

Procedure: Assume same positive value for Spouse's Income.

EDIT 2059

Condition: Independent, Student's Income from Worksheet C is greater than zero, and equal to or greater than the sum\* of:  
(Student's AGI plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is tax filer)  
or  
(Student's Income plus Spouse's Income plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is non-tax filer)

\* use zero, if any value in the calculation is negative or blank.

Procedure: Assume zero for Student's Income from Worksheet C.

EDIT 2060

Condition: Independent, Student's Income from Worksheet C re-entered as equal to or greater than the sum of total income.

Procedure: Make no assumption for Student's Income from Worksheet C.

EDIT 2061

Condition: Dependent, Student's Income from Worksheet C is greater than zero, and equal to or greater than the sum\* of:  
(Student's AGI plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is tax filer)  
or  
(Student's Income plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is non-tax filer)  
\* use zero, if any value in the calculation is negative or blank.

Procedure: Assume zero for Student's Income from Worksheet C.

EDIT 2062

Condition: Dependent, Student's Income from Worksheet C re-entered as equal to or greater than the sum of total income.

Procedure: Make no assumption for Student's Income from Worksheet C.

## SIMPLIFIED NEEDS TEST

Perform the appropriate simplified needs analysis calculation if one of the following conditions is met. Place the results of the calculations in the primary EFC field. Also perform the full data calculation if supplemental data that matches the model is provided and place the results in the secondary EFC field.

If a value has been assumed for a data field, then the assumed value should be used for the edits that use that data field, unless otherwise stated in the edit. If an income field is blank, use zero for the calculations in these edits.

### DEPENDENT MODEL

If the Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, and Parents' Income from Worksheet B are all blank, do not perform simplified needs test.

#### EDIT 3001 !

**Condition:** One of parents' SSI, Food Stamps, Free/Reduced Price Lunch, TANF, or WIC is Yes, and (parents' reported AGI is non-blank, and assumed AGI (or reported AGI if no assumption has been made) is less than \$50,000@) or (parents' reported AGI is blank and father's income plus mother's income is less than \$50,000@).

**Procedure:** Set simplified needs.

#### EDIT 3002

**Condition:** Parents' type of tax return is 1040A/EZ or Trust Territory (2 or 4), parents' reported AGI is non-blank, and assumed AGI (or reported AGI if no assumption has been made) is less than \$50,000@.

**Procedure:** Set simplified needs.

#### EDIT 3003

**Condition:** Parents' tax return status is will not file, parents' type of tax return is blank, and father's income plus mother's income is less than \$50,000@.

**Procedure:** Set simplified needs.

@ These values are variables.

EDIT 3004

Condition: Parents eligible for 1040A is Yes, parents' reported AGI is non-blank, and assumed AGI (or reported AGI if no assumption has been made) is less than \$50,000@.

Procedure: Set simplified needs.

EDIT 3005 !

Condition: One of parents' SSI, Food Stamps, Free/Reduced Price Lunch, TANF, or WIC is Yes, and (parents' reported AGI is non-blank, and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less) or (parents' reported AGI is blank and father's income plus mother's income is \$20,000@ or less).

Procedure: Set Automatic Zero EFC flag.

EDIT 3006

Condition: Parents' type of tax return is 1040A/EZ or Trust Territory (2 or 4), parents' reported AGI is non-blank, and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3007

Condition: Parents' tax return status is will not file, parents' type of tax return is blank, and father's income plus mother's income is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3008

Condition: Parents eligible for 1040A is Yes, parents' reported AGI is non-blank, and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

@ These values are variables.

## INDEPENDENT MODEL

If Student's AGI, Student's Income, Spouse's Income, Student's Income from Worksheet A, and Student's Income from Worksheet B are all blank, do not perform simplified needs test.

EDIT 3009 !

Condition: One of student's SSI, Food Stamps, Free/Reduced Price Lunch, TANF, or WIC is Yes, and (student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is less than \$50,000@) or (student's reported AGI is blank and student's income plus spouse's income is less than \$50,000@).

Procedure: Set simplified needs.

EDIT 3010

Condition: Student's type of tax return is 1040A/EZ or Trust Territory (2 or 4) and student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is less than \$50,000@.

Procedure: Set simplified needs.

EDIT 3011

Condition: Student's tax return status is will not file, student's type of tax return is blank, and student's income plus spouse's income is less than \$50,000@.

Procedure: Set simplified needs.

EDIT 3012

Condition: Student eligible for 1040A is Yes, student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is less than \$50,000@.

Procedure: Set simplified needs.

@ These values are variables.

EDIT 3013 !

Condition: Student's marital status is married, student's number of family members is greater than 2, one of student's SSI, Food Stamps, Free/Reduced Price Lunch, TANF, or WIC is Yes, and (student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less) or (student's reported AGI is blank and student's income plus spouse's income is \$20,000@ or less).

Procedure: Set Automatic Zero EFC flag.

EDIT 3014

Condition: Student's marital status is married, student's number of family members is greater than 2, student's type of tax return is 1040A/EZ or Trust Territory (2 or 4), and student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3015

Condition: Student's marital status is married, student's number of family members is greater than 2, student's tax return status is will not file, student's type of tax return is blank, and student's income plus spouse's income is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3016

Condition: Student's marital status is married, student's number of family members is greater than 2, student eligible for 1040A is Yes, student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

@ These values are variables.

EDIT 3017 !

Condition: Student's marital status is unmarried or separated, student's number of family members is greater than 1, one of student's SSI, Food Stamps, Free/Reduced Price Lunch, TANF, or WIC is Yes, and (student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less) or (student's reported AGI is blank and student's income plus spouse's income is \$20,000@ or less).

Procedure: Set Automatic Zero EFC flag.

EDIT 3018

Condition: Student's marital status is unmarried or separated, student's number of family members is greater than 1, student's type of tax return is 1040A/EZ or Trust Territory (2 or 4), and student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3019

Condition: Student's marital status is unmarried or separated, student's number of family members is greater than 1, student's tax return status is will not file, student's type of tax return is blank, and student's income is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3020

Condition: Student's marital status is unmarried or separated, student's number of family members is greater than 1, student eligible for 1040A is Yes, and student's reported AGI is non-blank and assumed AGI (or reported AGI if no assumption has been made) is \$20,000@ or less.

Procedure: Set Automatic Zero EFC flag.

@ These values are variables.

## COMPLETE REJECT EDIT SPECIFICATIONS

Reject reason codes are alphabetic and numeric. The codes are listed below in priority order. When an application has been rejected for more than one reason, use the highest priority code.

If a value has been assumed for a data field, then the assumed value should be used for the reject edits that use that data field unless otherwise stated in the reject edit.

### 2007-2008 REJECT CODES AND REASONS

Code	Edit	Reason
2	4001 4002	All income questions blank
1	4003 4004	Family does not qualify for simplified needs test and didn't complete supplemental data
17	4005	Citizenship status blank or not eligible
13	4006	First and last name blank
N	4007	First or last name blank
18	4009	SSN not on SSA database
R	4010	SSN match but no Date of Birth match
D	4012	SSN match but no Name match
8	4014	SSN match with Date of Death
5	4015	Date of birth blank or invalid
A	4016	Date of birth year is 1900 through 1932
B	4018	Independent status in question because of student's age
12	4020	Parents' Taxes Paid greater than or equal to AGI
3	4021	Student's Taxes Paid greater than or equal to AGI



Code	Edit	Reason
C	4022 4023	Taxes paid greater than or equal to 40% of AGI (parent, indep. student)
G	4026	Taxes paid greater than or equal to 40% of AGI (dependent student)
10	4028 4029	Marital status and family members blank
W	4030 4032	Number of family member appears high
11	4034 4035	Marital status inconsistent with base year income
15	4036	Parent's signature missing
14	4037	Student's signature missing
9	4038	Dependent, Father's and Mother's SSN blank
6	4039	Father's SSN not on SSA database
7	4040	Mother's SSN not on SSA database
S	4041	Father's SSN match but no Date of Birth match
T	4043	Mother's SSN match but no Date of Birth match
E	4045	Father's SSN match but no Name match
F	4047	Mother's SSN match but no Name match
J	4049	Father's SSN all zeroes but filed tax return
K	4051	Mother's SSN all zeroes but filed tax return

EDIT 4001

Condition: Dependent, and reported values for Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, and Parents' Income from Worksheet B are all blank.

Procedure: Set reject reason 2.

EDIT 4002

Condition: Independent, and reported values for Student's AGI, Student's Income, Spouse's Income, Student's Income from Worksheet A, and Student's Income from Worksheet B are all blank.

Procedure: Set reject reason 2.

EDIT 4003

Condition: Dependent, simplified needs test is not met, automatic zero EFC flag is not set, and all of reported values for supplemental data fields for parent and student are blank.

Supplemental data is defined as follows:

Parents'/Student's Cash, Savings and Checking, Parents'/Student's Real Estate/Investment Net Worth, Parents'/Student's Business/Farm Net Worth.

Procedure: Set reject reason 1.

EDIT 4004

Condition: Independent, simplified needs test is not met, automatic zero EFC flag not set, and all of reported data for supplemental data fields for students are blank.

Supplemental data is defined as follows:

Student's Cash, Savings and Checking, Student's Real Estate/Investment Net Worth, Student's Business/Farm Net Worth.

Procedure: Set reject reason 1.

EDIT 4005

Condition: Citizenship is blank or not eligible.

Procedure: Set reject reason 17.

EDIT 4006

Condition: First Name and Last Name are blank.

Procedure: Set reject reason 13.

EDIT 4007

Condition: One of First Name or Last Name is blank.

Procedure: Set reject reason N.

EDIT 4008

Condition: One of First Name or Last Name is re-entered as blank on a correction record.

Procedure: Suppress reject N.

EDIT 4009

Condition: Student SSN Match Flag equals 1.

Procedure: Set reject reason 18.

EDIT 4010

Condition: Student SSN Match Flag equals 2.

Procedure: Set reject reason R.

EDIT 4011

Condition: Date of Birth is re-entered as same value on a correction record.

Procedure: Suppress reject R.

EDIT 4012

Condition: Student SSN Match Flag equals 3.

Procedure: Set reject reason D.

EDIT 4013

Condition: First and Last Name are re-entered as same value on a correction record.

Procedure: Suppress reject D.

EDIT 4014

Condition: Student SSN Match Flag equals 5.

Procedure: Set reject reason 8.

EDIT 4015

Condition: Date of Birth is blank or day is out of range.

Month Valid Day Range (inclusive)

01	01-31
02	01-28 (unless year is divisible by 4 when 01-29 is valid)
03	01-31
04	01-30
05	01-31
06	01-30
07	01-31
08	01-31
09	01-30
10	01-31
11	01-30
12	01-31

Procedure: Set reject reason 5.

EDIT 4016 !

Condition: Date of Birth year is equal to 1900 through 1932 and Student SSN Match Flag is not equal to 4.

Procedure: Set reject reason A.

EDIT 4017 !

Condition: Date of Birth year is re-entered as same value of 1900 through 1932 on a correction record.

Procedure: Suppress reject A.

EDIT 4018 !

Condition: Independent, Date of Birth is 09/01/91 or greater and not out of range, answer to Orphan or Ward is "No" or blank, and Student SSN Match Flag is not equal to 4.

Procedure: Set reject reason B.

EDIT 4019

Condition: Date of Birth is re-entered as same value on a correction record.

Procedure: Suppress reject B.

EDIT 4020

Condition: Dependent and Parents' Taxes Paid is greater than zero and equal to or greater than Parents' AGI.

Procedure: Set reject reason 12.

EDIT 4021

Condition: Student's Taxes Paid is greater than zero and equal to or greater than Student's AGI.

Procedure: Set reject reason 3.

EDIT 4022

Condition: Dependent and Parents' Taxes Paid is greater than zero, not equal to or greater than Parents' AGI, greater than or equal to 40% of Parents' AGI, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason C.

EDIT 4023

Condition: Parents' Taxes Paid is re-entered as same value on a correction record.

Procedure: Suppress reject C.

EDIT 4024

Condition: Independent and Student's Taxes Paid is greater than zero, not equal to or greater than Student's AGI, greater than or equal to 40% of Student's AGI, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason C.

EDIT 4025

Condition: Student's Taxes Paid is re-entered as same value on a correction record.

Procedure: Suppress reject C.

EDIT 4026

Condition: Dependent and Student's Taxes Paid is greater than zero, not equal to or greater than Student's AGI, greater than or equal to 40% of Student's AGI, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason G.

EDIT 4027

Condition: Student's Taxes Paid is re-entered as same value on a correction record.

Procedure: Suppress reject G.

EDIT 4028

Condition: Dependent, Parents' Marital Status is blank, and Parents' Number of Family Members is blank or 01.

Procedure: Set reject reason 10.

EDIT 4029

Condition: Independent, Student's Marital Status is blank, and Student's Family Members is blank.

Procedure: Set reject reason 10.

EDIT 4030

Condition: Dependent, Parents' Number of Family Members is 15 or more, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason W.

EDIT 4031

Condition: Parents' Number of Family Members is re-entered as the same value on a correction record.

Procedure: Suppress reject W.

EDIT 4032

Condition: Independent, Student's Number of Family Members is 15 or more, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason W.

EDIT 4033

Condition: Student's Number of Family Members is re-entered as the same value on a correction record.

Procedure: Suppress reject W.

EDIT 4034

Condition: Dependent, Father's Income and Mother's Income are both non-zero and non-blank, Parents' Marital Status is single, separated/divorced, or widowed, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason 11.

EDIT 4035

Condition: Independent, Spouse's Income is non-blank and non-zero, Student's Marital Status is separated or unmarried, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason 11.



EDIT 4036

Condition: Dependent and parent did not sign application.

Procedure: Set reject reason 15.

EDIT 4037

Condition: Student did not sign application.

Procedure: Set reject reason 14.

EDIT 4038

Condition: Dependent and (any one of Father's SSN, Last Name and Date of Birth is blank) and (any one of Mother's SSN, Last Name and Date of Birth is blank).

Procedure: Set reject reason 9.

EDIT 4039

Condition: Dependent, Father's SSN Match Flag is equal to 1 and Mother's SSN Match Flag is not equal to 4.

Procedure: Set reject reason 6.

EDIT 4040

Condition: Dependent, Mother's SSN Match Flag is equal to 1 and Father's SSN Match Flag is not equal to 4.

Procedure: Set reject reason 7.

EDIT 4041

Condition: Dependent, Father's SSN Match Flag is equal to 2 and Mother's SSN Match Flag is not equal to 4.

Procedure: Set reject reason S.

EDIT 4042

Condition: Dependent and Father's Date of Birth is re-entered as same value on a correction record.

Procedure: Suppress reject S.

EDIT 4043

Condition: Dependent, Mother's SSN Match Flag is equal to 2 and Father's SSN Match Flag is not equal to 4.

Procedure: Set reject reason T.

EDIT 4044

Condition: Dependent and Mother's Date of Birth is re-entered as same value on a correction record.

Procedure: Suppress reject T.

EDIT 4045

Condition: Dependent, Father's SSN Match Flag is equal to 3 and Mother's SSN Match Flag is not equal to 4.

Procedure: Set reject reason E.

EDIT 4046

Condition: Dependent and Father's Last Name and First Initial are re-entered as same value on a correction record.

Procedure: Suppress reject E.

EDIT 4047

Condition: Dependent, Mother's SSN Match Flag is equal to 3 and Father's SSN Match Flag is not equal to 4.

Procedure: Set reject reason F.

EDIT 4048

Condition: Dependent and Mother's Last Name and First Initial are re-entered as same value on a correction record.

Procedure: Suppress reject F.

EDIT 4049

Condition: Dependent, Father's SSN is all zeroes, Mother's SSN is blank or all zeroes, Parents' Tax Return Status is filed or will file, and Type of Tax Return is not foreign.

Procedure: Set reject reason J.

EDIT 4050

Condition: Dependent and Father's SSN is re-entered as same value on a correction record.

Procedure: Suppress reject J.

EDIT 4051

Condition: Dependent, Mother's SSN is all zeroes, Father's SSN is blank or all zeroes, Parents' Tax Return Status is filed or will file, and Type of Tax Return is not foreign.

Procedure: Set reject reason K.

EDIT 4052

Condition: Dependent and Mother's SSN is re-entered as same value on a correction record.

Procedure: Suppress reject K.

The specifications in this section define which EFC formula should be used for the primary or secondary calculations.

Two calculations, a primary and a secondary, will be performed if an applicant has met the simplified needs test and has reported supplemental data that matches their model.

For dependent applicants, supplemental data is defined as follows:

Parents'/Student's Cash, Savings and Checking, Parents'/Student's Real Estate/Investment Net Worth, Parents'/Student's Business/Farm Net Worth.

For independent applicants, supplemental data is defined as follows:

Student's Cash, Savings and Checking, Student's Real Estate/Investment Net Worth, Student's Business/Farm Net Worth.

When the simplified needs test is met, the simplified calculation will always be the primary number.

If the automatic zero EFC flag is set to Y, set the primary EFC to 0 (calculate formula type, Total Income (TI), Student Total Income (STI) and FISAP Total Income (FTI) only and carry on the record). Do not calculate a secondary EFC or Alternate EFCs.

For all other records, calculate the primary EFC and secondary EFC as described below.

#### Primary EFC

If the simplified needs test is met. Use the simplified calculation (formula type 4, 5, or 6).

If the simplified needs test is not met. Use the full data calculation (formula type 1, 2, or 3).

#### Secondary EFC

If the simplified needs test is met and the supplemental data has been completed Use the full data calculation (formula type 1, 2, or 3).

### Determination of EFC Formula Type

- Formula #1 - Dependent
- Formula #2 - Independent Without Dependents Other Than A Spouse
- Formula #3 - Independent With Dependents Other Than A Spouse
- Formula #4 - Simplified Dependent
- Formula #5 - Simplified Independent Without Dependents Other Than A Spouse
- Formula #6 - Simplified Independent With Dependents Other Than A Spouse

#### For full application data filers:

##### EDIT 5001

Condition: If model is D.

Procedure: Use Formula #1.

##### EDIT 5002

Condition: If model is I, and Student's Marital Status is married, and Student's Number of Family Members is less than or equal to 2.

Procedure: Use Formula #2.

##### EDIT 5003

Condition: If model is I, and Student's Marital Status is unmarried or separated, and Student's Number of Family Members equals 1.

Procedure: Use Formula #2.

##### EDIT 5004

Condition: If model is I, and Student's Marital Status is married, and Student's Number of Family Members is greater than 2.

Procedure: Use Formula #3.

Condition: If model is I, and Student's Marital Status is unmarried or separated, and Student's Number of Family Members is greater than 1.

Procedure: Use Formula #3.

#### EDIT 5006

Condition: If model is I and the following fields are non-blank:

- One of Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, Parents' Income from Worksheet B
- Parents' Marital Status
- Parents' Number of Family Members
- Parents' Number in College

Procedure: Calculate Parents' Contribution (PC) using Formula #1, Steps 1-8. If Parents' AGI is non-blank, assume status is tax filer. If Parents' AGI is blank, assume status is non-tax filer. If any financial field is blank, assume zero for calculation.

For filers meeting simplified needs test:

#### EDIT 5007

Condition: If model is D.

Procedure: Use Formula #4.

#### EDIT 5008

Condition: If model is I, Student's Marital Status is married, and Student's Number of Family Members is less than or equal to 2.

Procedure: Use Formula #5.

EDIT 5009

Condition: If model is I, Student's Marital Status is unmarried or separated, and Student's Number of Family Members equals 1.

Procedure: Use Formula #5.

EDIT 5010

Condition: If model is I, Student's Marital Status is married, and Student's Number of Family Members is greater than 2.

Procedure: Use Formula #6.

EDIT 5011

Condition: If model is I, Student's Marital Status is unmarried or separated, and Student's Number of Family Members is greater than 1.

Procedure: Use Formula #6.

EDIT 5012

Condition: If model is I and the following fields are non-blank:

- One of Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, Parents' Income from Worksheet B
- Parents' Marital Status
- Parents' Number of Family Members
- Parents' Number in College

Procedure: Calculate Parents' Contribution (PC) using Formula #4, Steps 1-5. If Parents' AGI is non-blank, assume status is tax filer. If Parents' AGI is blank, assume status is non-tax filer. If any financial field is blank, assume zero for calculation.



## 2007-2008 EFC Formula Specifications

### Guidelines for Computations

1. Use the amounts assumed as values for the fields referred to. If no amount is assumed, use the reported amount.
2. If any field referred to is blank and has no assumed value, use zero for computation purposes.
3. Set any negative amounts on the input data to zero for computation purposes.
4. Unless otherwise specified, all calculations should be carried to 3 decimal places and then rounded to the nearest whole numbers (upward from .500 and downward from .499). Rounding should be performed after each calculation in the formula. The intermediate value that is the result of each step will not have any decimal digits.

For example, 4.5 would be rounded to 5; 4.499 would be rounded to 4; -4.5 would be rounded to -5.

EFC FORMULA 1 - DEPENDENT

STEP 1: Total Income (TI)

If parents' tax filing status is tax filer, then sum the following parents' data:

$(\text{Parents' AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If parents' tax filing status is non-tax filer, then sum the following parents' data:

$(\text{Father's Income} + \text{Mother's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

! a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Parents' State of Legal Residence. If blank or invalid, use Student's State of Legal Residence. If both fields are blank or invalid, use Mailing State. If all three fields are blank or invalid, use rates for blank or invalid State.

## EFC FORMULA 1 - Page 2

2007-2008 State and Other Tax Allowance		
State	Total Income	
	0 - 14,999	15,000 or more
SD, TN, WY	1%	0%
AK, FL, LA, NV, ND, TX, WA	2%	1%
AL, MS, WV	3%	2%
AR, AZ, CO, DE, HI, IN, NH, NM, OK	4%	3%
GA, ID, IL, IA, KS, KY, MI, MO, MT, NE, PA, SC, UT, VA	5%	4%
ME, MA, MN, NC, OH, VT	6%	5%
CA, CT, DC, MD, RI, WI	7%	6%
NJ, NY, OR	8%	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	3%	2%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

EFC FORMULA 1 - Page 3

! b) Social Security Tax (SST):

Calculation from table using Father's Income = Father's SST (FSST)

Calculation from table using Mother's Income = Mother's SST (MSST)

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

$FSST + MSST = SST$

SST will never be less than zero.

! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (include student)	Parents' Number in College				
	1	2	3	4	5
2	\$15,000	\$12,430			
3	\$18,680	\$16,130	\$13,560		
4	\$23,070	\$20,510	\$17,950	\$15,390	
5	\$27,220	\$24,660	\$22,100	\$19,540	\$16,980
6	\$31,840	\$29,280	\$26,720	\$24,160	\$21,600

For each additional family member add 3,590. For each additional college student subtract 2,550.

-----  
If Parents' Number in College is 5 or less, IPA = PIPA.

If Parents' Number in College is 6 or more, IPA = PIPA for 5 in college - (2,550 x (Parents' Number in College - 5)).

NOTE: IPA will never be less than zero.

## ! d) Employment Allowance (EA):

If Parents' Marital Status is "married" and:

- 1) Father's Income and Mother's Income are both greater than zero, then  $.35 \times$  (the lesser of Father's Income or Mother's Income) = EA
- 2) Father's Income and Mother's Income are not both greater than zero,  $0 = EA$ .

If Parents' Marital Status is "single", "separated/divorced", or "widowed" and:

- 1) One of Father's Income or Mother's Income is greater than zero, then  $.35 \times$  Father's Income or Mother's Income (whichever is greater than zero) = EA.
- 2) Neither Father's Income nor Mother's Income is greater than zero, then  $0 = EA$ .

If EA is greater than 3,200, set to 3,200.

NOTE: EA will never be less than zero.

## e) If parents' tax filing status is tax filer:

$$\text{Parents' Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If parents' tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

EFC FORMULA 1 - Page 5

STEP 3: Available Income (AI)

$$TI - ATI = AI$$

AI may be less than zero.

STEP 4: Discretionary Net Worth (DNW)

! a) Adjusted Net Worth of Business/Farm (ANW):

Calculation from table = ANW

Business & Farm Net Worth Adjustment

Net Worth of Business/Farm	Adjusted Net Worth
Less than 1	0
1 – 105,000	40% of Net Worth of Business/Farm
105,001 – 320,000	42,000 plus 50% of NW over 105,000
320,001 – 535,000	149,500 plus 60% of NW over 320,000
535,001 or more	278,500 plus 100% of NW over 535,000

b) Net Worth (NW):

ANW + Parents' Real Estate/Investment Net Worth + Parents' Cash, Savings, and Checking = NW

! c) Education Savings and Asset Protection Allowance (APA):

Amount from table = APA

NOTE: If Age of Older Parent is blank, use age 45 on table.

If Age of Older Parent is less than 25, use age 25 on table.

If Age of Older Parent is greater than 65, use age 65 on table.

## Education Savings and Asset Protection Allowance

Age of Older Parent as of 12/31/2007	Allowance - Married	Allowance - Single
25 or less 0	0	0
26	2,500	1,000
27	5,100	2,100
28	7,600	3,100
29	10,200	4,200
30	12,700	5,200
31	15,200	6,300
32	17,800	7,300
33	20,300	8,400
34	22,900	9,400
35	25,400	10,500
36	27,900	11,500
37	30,500	12,600
38	33,000	13,600
39	35,600	14,700
40	38,100	15,700
41	39,100	16,100
42	40,100	16,400
43	41,100	16,800
44	42,100	17,200
45	43,100	17,500
46	44,200	17,900
47	45,300	18,300
48	46,400	18,800
49	47,600	19,200
50	48,700	19,700
51	50,200	20,100
52	51,500	20,500
53	53,000	21,000
54	54,300	21,600
55	55,900	22,100
56	57,300	22,700
57	59,000	23,200
58	60,700	23,900
59	62,500	24,400
60	64,300	25,100

## EFC FORMULA 1 - Page 7

Age of Older Parent as of 12/31/2007	Allowance - Married	Allowance – Single
61	66,200	25,700
62	68,100	26,400
63	70,400	27,200
64	72,400	27,900
65 or over	74,800	28,700

## d) Discretionary Net Worth (DNW):

$$\text{NW} - \text{APA} = \text{DNW}$$

DNW may be less than zero.

## STEP 5: Parents Contribution From Assets (PCA)

$$\text{DNW} \times 12\% = \text{PCA}$$

If PCA is less than zero, set it to zero.

## STEP 6: Adjusted Available Income (AAI)

$$\text{AI} + \text{PCA} = \text{AAI}$$

AAI may be less than zero.



## EFC FORMULA 1 - Page 8

## STEP 7: ! Total Parents' Contribution (TPC)

Calculation from table = TPC

## AAI Taxation Rates

Parents' AAI	Parents' Contribution
-3,410 or less	-750
-3,409 - 13,400	22% of AAI
13,401 - 16,800	2,948 + 25% of AAI over 13,400
16,801 - 20,200	3,798 + 29% of AAI over 16,800
20,201 - 23,700	4,784 + 34% of AAI over 20,200
23,701 - 27,100	5,974 + 40% of AAI over 23,700
27,101 or more	7,334 + 47% of AAI over 27,100

If TPC is less than zero, set it to zero.

## STEP 8: Parents' Contribution (PC)

$TPC / \text{Parents' Number in College} = (PC)$

## STEP 9: Student's Total Income (STI)

If the student's tax filing status is tax filer, sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{STI}$

If the student's tax filing status is non-tax filer, sum the following student data:

$(\text{Student's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{STI}$

## EFC FORMULA 1 - Page 9

## STEP 10: Student Allowances Against Total Income (SATI)

## ! a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If Mailing State is blank or invalid, use Parents' State of Legal Residence. If all three fields are blank or invalid, use rates for blank or invalid State.

2007-2008 State and Other Tax Allowance:	
State	
AK, FL, SD, TN, TX, WA, WY	0%
NV, NH, ND	1%
AL, AZ, IL, IN, LA, MS, WV	2%
AR, CO, DE, GA, HI, ID, IA, KS, ME, MI, MO, MT, NE, NM, OK, PA, SC, UT, VT, VA	3%
CA, CT, KY, MA, MN, NJ, NC, OH, RI, WI	4%
MD, NY, OR	5%
DC	6%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	2%

$$STI \times ST\% = STX$$

If STX is less than zero, set it to zero.

## ! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST (FSST)

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

SST will never be less than zero.

## c) Negative Adjusted Available Income Offset (AIO)

If Parents' AAI is negative, set to positive value = AIO

If Parents' AAI is zero or positive, zero = AIO

## ! d) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{AIO} + 3,000 = \text{SATI}$$

If student's tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{AIO} + 3,000 = \text{SATI}$$

## STEP 11: Student's Income Contribution (SIC)

$$(\text{STI} - \text{SATI}) \times .5 = \text{SIC}$$

If SIC is less than zero, set it to zero.

EFC FORMULA 1 - Page 11

STEP 12: Discretionary Net Worth of Student (SDNW)

a) Student's Real Estate/Investment Net Worth + Student's Business/Farm Net Worth + Student's Cash, Savings, and Checking = SDNW

STEP 13: ! Student Contribution From Assets (SCA)

$$\text{SDNW} \times .20 = \text{SCA}$$

STEP 14: Expected Family Contribution (EFC)

$$\text{PC} + \text{SIC} + \text{SCA} = \text{EFC}$$

If EFC is greater than 99,999, set it to 99,999.

STEP 15: FISAP Total Income (FTI)

$$\text{TI} + \text{STI} = \text{FTI}$$

EFC FORMULA 2 - INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following student data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowance Against Total Income (ATI)

- ! a) State and Other Tax Allowance (STX):  
Appropriate rate from table = ST%.

Use Student's State of Legal Residence to find State. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

2007-2008 State and Other Tax Allowance	
AK, FL, SD, TN, TX, WA, WY	0%
NV, NH, ND	1%
AL, AZ, IL, IN, LA, MS, WV	2%
AR, CO, DE, GA, HI, ID, IA, KS, ME, MI, MO, MT, NE, NM, OK, PA, SC, UT, VT, VA	3%
CA, CT, KY, MA, MN, NJ, NC, OH, RI, WI	4%
MD, NY, OR	5%
DC	6%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	2%

$$TI \times ST\% = STX$$

If STX is less than zero, set it to zero.

! b) Social Security Taxes (SST)

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

$$FSST + MSST = SST$$

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

SST will never be less than zero.

## EFC FORMULA 2 - Page 3

## ! c) Income Protection Allowance (IPA):

If Student's Marital Status is "married" and number in college equals 2, then  $IPA = 6,050$ .

If Student's Marital Status is "married" and number in college is less than 2, then  $IPA = 9,700$ .

If Student's Marital Status is "unmarried" or "separated", then  $IPA = 6,050$ .

NOTE: IPA will never be less than zero.

## ! d) Employment Allowance (EA):

If Student's Marital Status is "married" and:

1) Student's Income and Spouse's Income are both greater than zero, then  $.35 \times$  (the lesser of the Student's Income or Spouse's Income) = EA.

2) Student's Income and Spouse's Income are not both greater than zero, then  $EA = 0$ .

If Student's Marital Status is "unmarried" or "separated", then  $EA = 0$ .

If EA is greater than 3,200, set to 3,200.

NOTE: EA will never be less than zero.

## e) If Student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

If Student's tax filing status is non-tax filer:

$$\text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## EFC FORMULA 2 - Page 4

## STEP 4: Contribution from Available Income (CAI)

$$AI \times .5 = CAI$$

CAI may be less than zero.

## STEP 5: Net Worth (NW)

## ! a) Adjusted Net Worth of Business and Farm (ANW):

Calculation from table = ANW

## Business/Farm Net Worth Adjustment

Net Worth of Business/Farm	Adjusted Net Worth
Less than 1	0
1 – 105,000	40% of Net Worth of Business/Farm
105,001 – 320,000	42,000 plus 50% of NW over 105,000
320,001 – 535,000	149,500 plus 60% of NW over 320,000
535,001 or more	278,500 plus 100% of NW over 535,000

## b) Net Worth (NW):

ANW + Student's Real Estate/Investment Net Worth + Student's Cash, Savings, and Checking = NW

## STEP 6: ! Asset Protection Allowance (APA)

Amount from table = APA



## EFC FORMULA 2 - Page 5

## Asset Protection Allowance

Student's Age as of 12/31/2007	Allowance - Married	Allowance - Single
25 or less	0	0
26	2,500	1,000
27	5,100	2,100
28	7,600	3,100
29	10,200	4,200
30	12,700	5,200
31	15,200	6,300
32	17,800	7,300
33	20,300	8,400
34	22,900	9,400
35	25,400	10,500
36	27,900	11,500
37	30,500	12,600
38	33,000	13,600
39	35,600	14,700
40	38,100	15,700
41	39,100	16,100
42	40,100	16,400
43	41,100	16,800
44	42,100	17,200
45	43,100	17,500
46	44,200	17,900
47	45,300	18,300
48	46,400	18,800
49	47,600	19,200
50	48,700	19,700
51	50,200	20,100
52	51,500	20,500
53	53,000	21,000
54	54,300	21,600
55	55,900	22,100
56	57,300	22,700
57	59,000	23,200
58	60,700	23,900
59	62,500	24,400
60	64,300	25,100

## EFC FORMULA 2 - Page 6

Student's Age as of 12/31/2007	Allowance - Married	Allowance – Single
61	66,200	25,700
62	68,100	26,400
63	70,400	27,200
64	72,400	27,900
65 or over	74,800	28,700

## STEP 7: Discretionary Net Worth (DNW)

$$NW - APA = DNW$$

DNW may be less than zero.

## STEP 8: ! Student's Contribution From Assets (SCA)

$$DNW \times .20 = SCA$$

If SCA is less than zero, set it to zero.

## STEP 9: Expected Family Contribution (EFC)

$$(CAI + SCA) / \text{Student's Number in College} = EFC$$

If EFC is less than zero, set it to zero.

If EFC is greater than 99,999, set it to 99,999.

## STEP 10: FISAP Total Income (FTI)

$$TI = FTI$$

EFC FORMULA 3 - INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

! a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

## EFC FORMULA 3 - Page 2

2007-2008 State and Other Tax Allowance		
State	Total Income	
	0 - 14,999	15,000 or more
SD, TN, WY	1%	0%
AK, FL, LA, NV, ND, TX, WA	2%	1%
AL, MS, WV	3%	2%
AR, AZ, CO, DE, HI, IN, NH, NM, OK	4%	3%
GA, ID, IL, IA, KS, KY, MI, MO, MT, NE, PA, SC, UT, VA	5%	4%
ME, MA, MN, NC, OH, VT	6%	5%
CA, CT, DC, MD, RI, WI	7%	6%
NJ, NY, OR	8%	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	3%	2%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

EFC FORMULA 3 - Page 3

! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

$FSST + MSST = SST$

SST will never be less than zero.

! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (include student)	Student's Number in College				
	1	2	3	4	5
2	\$15,320	\$12,700			
3	\$19,070	\$16,470	\$13,850		
4	\$23,560	\$20,940	\$18,330	\$15,710	
5	\$27,800	\$25,170	\$22,570	\$19,950	\$17,340
6	\$32,510	\$29,890	\$27,290	\$24,660	\$22,060

For each additional family member add 3,670. For each additional college student subtract 2,610.

-----  
If Student's Number in College is 5 or less, IPA = PIPA.

If Student's Number in College is 6 or more, IPA = PIPA for 5 in college - (2,610 x (Student's Number in College - 5)).

NOTE: IPA will never be less than zero.

## ! d) Employment Allowance (EA):

If Student's Marital Status is "married":

$$.35 \times (\text{the lesser of Student's Income or Spouse's Income}) = \text{EA}$$

If Student's Marital Status is "unmarried" or "separated":

$$.35 \times \text{Student's Income} = \text{EA.}$$

If EA is greater than 3,200, set to 3,200.

NOTE: EA will never be less than zero.

## e) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If student's tax filing is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## STEP 4: Discretionary Net Worth (DNW)

## ! a) Adjusted Net Worth of Business and Farm (ANW):

Calculation from table = ANW

## EFC FORMULA 3 - Page 5

## Business/Farm Net Worth Adjustment

Net Worth of Business/Farm	Adjusted Net Worth
Less than 1	0
1 – 105,000	40% of Net Worth of Business/Farm
105,001 – 320,000	42,000 plus 50% of NW over 105,000
320,001 – 535,000	149,500 plus 60% of NW over 320,000
535,001 or more	278,500 plus 100% of NW over 535,000

## b) Net Worth (NW):

ANW + Student's Real Estate/Investment Net Worth + Student's Cash, Savings, and Checking = NW

## ! c) Asset Protection Allowance (APA):

Amount from table = APA

## EFC FORMULA 3 - Page 6

## Asset Protection Allowance

Student's Age as of 12/31/2007	Allowance - Married	Allowance - Single
25 or less	0	0
26	2,500	1,000
27	5,100	2,100
28	7,600	3,100
29	10,200	4,200
30	12,700	5,200
31	15,200	6,300
32	17,800	7,300
33	20,300	8,400
34	22,900	9,400
35	25,400	10,500
36	27,900	11,500
37	30,500	12,600
38	33,000	13,600
39	35,600	14,700
40	38,100	15,700
41	39,100	16,100
42	40,100	16,400
43	41,100	16,800
44	42,100	17,200
45	43,100	17,500
46	44,200	17,900
47	45,300	18,300
48	46,400	18,800
49	47,600	19,200
50	48,700	19,700
51	50,200	20,100
52	51,500	20,500
53	53,000	21,000
54	54,300	21,600
55	55,900	22,100
56	57,300	22,700
57	59,000	23,200
58	60,700	23,900
59	62,500	24,400
60	64,300	25,100



## EFC FORMULA 3 - Page 7

Student's Age as of 12/31/2007	Allowance – Married	Allowance – Single
61	66,200	25,700
62	68,100	26,400
63	70,400	27,200
64	72,400	27,900
65 or over	74,800	28,700

## d) Discretionary Net Worth (DNW):

$$NW - APA = DNW$$

DNW may be less than zero.

## STEP 5: ! Student's Contribution from Assets (SCA)

$$DNW \times 7\% = SCA$$

If SCA is less than zero, set it to zero.

## STEP 6: Adjusted Available Income (AAI)

$$AI + SCA = AAI$$

AAI may be less than zero.

## EFC FORMULA 3 - Page 8

## STEP 7: ! Total Student's Contribution (TSC)

Calculation from table = TSC

## AAI Taxation Rates

Student's AAI	Student's Contribution
-3,410 or less	-750
-3,409 - 13,400	22% of AAI
13,401 – 16,800	2,948 + 25% of AAI over 13,400
16,801 – 20,200	3,798 + 29% of AAI over 16,800
20,201 – 23,700	4,784 + 34% of AAI over 20,200
23,701 – 27,100	5,974 + 40% of AAI over 23,700
27,101 or more	7,334 + 47% of AAI over 27,100

If TSC is less than zero, set it to zero.

## STEP 8: Expected Family Contribution (EFC)

$TSC / \text{Student's Number in College} = EFC$

If EFC is greater than 99,999, set it to 99,999.

## STEP 9: FISAP Total Income (FTI)

$TI = FTI$

EFC FORMULA 4 - SIMPLIFIED DEPENDENT

STEP 1: Total Income (TI)

If parents' tax filing status is tax filer, then sum the following parents data:

(Parents' AGI + Income From Worksheet A + Income From Worksheet B) - Income From Worksheet C = TI

If parents' tax filing status is non-tax filer, then sum the following parents data:

(Father's Income + Mother's Income + Income From Worksheet A + Income From Worksheet B) - Income From Worksheet C = TI

STEP 2: Allowances Against Total Income (ATI)

! a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%.

Use Parents' State of Legal Residence. If Parents' Legal State of Residence is blank or invalid, use Student's State of Legal Residence. If both fields are blank or invalid, use Mailing State. If all three fields are blank or invalid, use rates for blank or invalid State.

## EFC FORMULA 4 - Page 2

2007-2008 State and Other Tax Allowance		
State	Total Income	
	0 - 14,999	15,000 or more
SD, TN, WY	1%	0%
AK, FL, LA, NV, ND, TX, WA	2%	1%
AL, MS, WV	3%	2%
AR, AZ, CO, DE, HI, IN, NH, NM, OK	4%	3%
GA, ID, IL, IA, KS, KY, MI, MO, MT, NE, PA, SC, UT, VA	5%	4%
ME, MA, MN, NC, OH, VT	6%	5%
CA, CT, DC, MD, RI, WI	7%	6%
NJ, NY, OR	8%	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	3%	2%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

EFC FORMULA 4 - Page 3

! b) Social Security Tax (SST):

Calculation from table using Father's Income = Father's SST (FSST)

Calculation from table using Mother's Income = Mother's SST (MSST)

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

$FSST + MSST = SST$

SST will never be less than zero.

! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (include student)	Parents' Number in College				
	1	2	3	4	5
2	\$15,000	\$12,430			
3	\$18,680	\$16,130	\$13,560		
4	\$23,070	\$20,510	\$17,950	\$15,390	
5	\$27,220	\$24,660	\$22,100	\$19,540	\$16,980
6	\$31,840	\$29,280	\$26,720	\$24,160	\$21,600

For each additional family member add 3,590. For each additional college student subtract 2,550.

-----  
If Parents' Number in College is 5 or less, IPA = PIPA.

If Parents' Number in College is 6 or more, IPA = PIPA for 5 in college - (2,550 x (Parents' Number in College - 5)).

NOTE: IPA will never be less than zero.

## EFC FORMULA 4 – Page 4

## ! d) Employment Allowance (EA):

If Parents' Marital Status is "married" and:

- 1) Father's Income and Mother's Income are both greater than zero, then  $.35 \times (\text{the lesser of Father's Income or Mother's Income}) = \text{EA}$
- 2) Father's Income and Mother's Income are not both greater than zero, then  $0 = \text{EA}$ .

If Parents' Marital Status is "single," "separated/divorced," or "widowed" and:

- 1) One of Father's Income or Mother's Income is greater than zero, then  $.35 \times \text{Father's Income or Mother's Income (whichever is greater than zero)} = \text{EA}$ .
- 2) Neither Father's Income nor Mother's Income is greater than zero, then  $0 = \text{EA}$ .

If EA is greater than 3,200, set to 3,200.

NOTE: EA will never be less than zero.

## e) If parents' tax filing status is tax filer:

$$\text{Parents' Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If parents' tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## EFC FORMULA 4 - Page 5

## STEP 4: ! Total Parents' Contribution (TPC)

Calculation from table = TPC

AAI Taxation Rates

NOTE: AI = AAI

Parents' AAI	Parents' Contribution
-3,410 or less	-750
-3,409 - 13,400	22% of AAI
13,401 – 16,800	2,948 + 25% of AAI over 13,400
16,801 – 20,200	3,798 + 29% of AAI over 16,800
20,201 – 23,700	4,784 + 34% of AAI over 20,200
23,701 – 27,100	5,974 + 40% of AAI over 23,700
27,101 or more	7,334 + 47% of AAI over 27,100

If TPC is less than zero, set it to zero.

## STEP 5: Parents' Contribution (PC)

$TPC / \text{Parents' Number in College} = PC$

## STEP 6: Student's Total Income (STI)

If student's tax filing status is tax filer, sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{STI}$

If student's tax filing status is non-tax filer, sum the following student data:

$(\text{Student's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{STI}$

STEP 7: Student Allowances Against Total Income (SATI)

! a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If Mailing State is blank or invalid, use Parents' State of Legal Residence. If all three fields are blank or invalid, use rates for blank or invalid State.

2007-2008 State and Other Tax Allowance	
AK, FL, SD, TN, TX, WA, WY	0%
NV, NH, ND	1%
AL, AZ, IL, IN, LA, MS, WV	2%
AR, CO, DE, GA, HI, ID, IA, KS, ME, MI, MO, MT, NE, NM, OK, PA, SC, UT, VT, VA	3%
CA, CT, KY, MA, MN, NJ, NC, OH, RI, WI	4%
MD, NY, OR	5%
DC	6%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	2%

$$STI \times ST\% = STX$$

If STX is less than zero, set it to zero.



## EFC FORMULA 4 - Page 7

## ! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST

## SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

SST will never be less than zero.

## c) Negative Available Income Offset (AIO)

If Parents' AI is negative, set to positive value = AIO

If Parents' AI is zero or positive, zero = AIO

## ! d) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{AIO} + 3,000 = \text{SATI}$$

If student's tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{AIO} + 3,000 = \text{SATI}$$

## STEP 8: Student's Income Contribution (SIC)

$$(\text{STI} - \text{SATI}) \times .5 = \text{SIC}$$

If SIC is less than zero, set it to zero.

EFC FORMULA 4 - Page 8

STEP 9: Expected Family Contribution (EFC)

$$PC + SIC = EFC$$

If EFC is greater than 99,999, set it to 99,999.

STEP 10: FISAP Total Income (FTI)

$$TI + STI = FTI$$

EFC FORMULA 5 - SIMPLIFIED INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following student data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

! a) State and Other Tax Allowance (STX):

$\text{Appropriate rate from table} = \text{ST}\%$

Use Student's State of Legal Residence to find State. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

2007-2008 State and Other Tax Allowance	
AK, FL, SD, TN, TX, WA, WY	0%
NV, NH, ND	1%
AL, AZ, IL, IN, LA, MS, WV	2%
AR, CO, DE, GA, HI, ID, IA, KS, ME, MI, MO, MT, NE, NM, OK, PA, SC, UT, VT, VA	3%
CA, CT, KY, MA, MN, NJ, NC, OH, RI, WI	4%
MD, NY, OR	5%
DC	6%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	2%

$$TI \times ST\% = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 5 - Page 3

## ! b) Social Security Taxes (SST)

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

$FSST + MSST = SST$

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

SST will never be less than zero.

## ! c) Income Protection Allowance (IPA)

1) If Student's Marital Status is "unmarried" or "separated", then  $IPA = 6,050$ .

2) If Student's Marital Status is "married" and number in college equals 2, then  $IPA = 6,050$ .

3) If Student's Marital Status is "married" and number in college is less than 2, then  $IPA = 9,700$ .

NOTE: IPA will never be less than zero.

## EFC FORMULA 5 – Page 4

## ! d) Employment Allowance (EA)

If Student's Marital Status is "married" and:

- 1) Student's Income and Spouse's Income are both greater than zero, then  $.35 \times$  (the lesser of Student's Income or Spouse's Income) = EA.
- 2) If Student's Income and Spouse's Income are not both greater than zero, then EA = 0.

If Student's Marital Status is "unmarried," or "separated," then EA = 0.

If EA is greater than 3,200, set to 3,200.

NOTE: EA will never be less than zero.

## e) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

If student's tax filing status is non-tax filer:

$$\text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## STEP 4: Contribution from Available Income (CAI)

$$\text{AI} \times .5 = \text{CAI}$$

CAI may be less than zero.

## STEP 5: Expected Family Contribution (EFC)

$$\text{CAI} / \text{Student's Number in College} = \text{EFC}$$

If EFC is less than zero, set it to zero.

If EFC is greater than 99,999, set it to 99,999.

## STEP 6: FISAP Total Income (FTI)

$$\text{TI} = \text{FTI}$$

EFC FORMULA 6 SIMPLIFIED INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following student data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

! a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%.

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

EFC FORMULA 6 - Page 2

2007-2008 State and Other Tax Allowance		
State	Total Income	
	0 - 14,999	15,000 or more
SD, TN, WY	1%	0%
AK, FL, LA, NV, ND, TX, WA	2%	1%
AL, MS, WV	3%	2%
AR, AZ, CO, DE, HI, IN, NH, NM, OK	4%	3%
GA, ID, IL, IA, KS, KY, MI, MO, MT, NE, PA, SC, UT, VA	5%	4%
ME, MA, MN, NC, OH, VT	6%	5%
CA, CT, DC, MD, RI, WI	7%	6%
NJ, NY, OR	8%	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI, AB, BC, MB, NB, NF, NL, NU, NT, NS, ON, PE, PQ, QC, SK, YT	3%	2%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.



EFC FORMULA 6 - Page 3

! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

SST Calculation Table

Income	Social Security Tax
0 – 94,200	7.65% of income
94,201 or greater	7,206.30 + 1.45% of amount over 94,200

$FSST + MSST = SST$

SST will never be less than zero.

! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (include student)	Student's Number in College				
	1	2	3	4	5
2	\$15,320	\$12,700			
3	\$19,070	\$16,470	\$13,850		
4	\$23,560	\$20,940	\$18,330	\$15,710	
5	\$27,800	\$25,170	\$22,570	\$19,950	\$17,340
6	\$32,510	\$29,890	\$27,290	\$24,660	\$22,060

For each additional family member add 3,670. For each additional college student subtract 2,610.

-----  
If Student's Number in College is 5 or less,  $IPA = PIPA$ .

If Student's Number in College is 6 or more,  $IPA = PIPA$  for 5 in college -  $(2,610 \times (\text{Student's Number in College} - 5))$ .

NOTE: IPA will never be less than zero.

! d) Employment Allowance (EA):

If Student's Marital Status is "married":

$$.35 \times (\text{the lesser of Student's Income or Spouse's Income}) = \text{EA}$$

If Student's Marital Status is "unmarried" or "separated":

$$.35 \times \text{Student's Income} = \text{EA.}$$

If EA is greater than 3,200, set to 3,200.

NOTE: EA will never be less than zero.

e) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If student's tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## EFC FORMULA 6 - Page 5

## STEP 4: ! Total Student Contribution (TSC)

Calculation from table = TSC

AAI Taxation Rates

NOTE: AI = AAI

Student's AAI	Student's Contribution
-3,410 or less	-750
-3,409 - 13,400	22% of AAI
13,401 – 16,800	2,948 + 25% of AAI over 13,400
16,801 – 20,200	3,798 + 29% of AAI over 16,800
20,201 – 23,700	4,784 + 34% of AAI over 20,200
23,701 – 27,100	5,974 + 40% of AAI over 23,700
27,101 or more	7,334 + 47% of AAI over 27,100

If TSC is less than zero, set it to zero.

## STEP 5: Expected Family Contribution (EFC)

$TSC / \text{Student's Number in College} = EFC$

If EFC is greater than 99,999, set it to 99,999.

## STEP 6: FISAP Total Income (FTI)

$TI = FTI$

## ALTERNATE EFC CALCULATIONS

Use primary EFC formula type and values to calculate alternate primary EFC's, and secondary formula type and values to calculate alternate secondary EFC's.

## ALTERNATE EFC FORMULA #1 - DEPENDENT

STEP 1: EFC's for less than 9 months

$$PC / 9 = \text{Monthly PC}$$

$$SIC/9 = \text{Monthly SIC}$$

$$\text{Monthly PC} + \text{Monthly SIC} + SCA = \text{EFC1}$$

$$(\text{Monthly PC} \times 2) + (\text{Monthly SIC} \times 2) + SCA = \text{EFC2}$$

$$(\text{Monthly PC} \times 3) + (\text{Monthly SIC} \times 3) + SCA = \text{EFC3}$$

$$(\text{Monthly PC} \times 4) + (\text{Monthly SIC} \times 4) + SCA = \text{EFC4}$$

$$(\text{Monthly PC} \times 5) + (\text{Monthly SIC} \times 5) + SCA = \text{EFC5}$$

$$(\text{Monthly PC} \times 6) + (\text{Monthly SIC} \times 6) + SCA = \text{EFC6}$$

$$(\text{Monthly PC} \times 7) + (\text{Monthly SIC} \times 7) + SCA = \text{EFC7}$$

$$(\text{Monthly PC} \times 8) + (\text{Monthly SIC} \times 8) + SCA = \text{EFC8}$$

STEP 2: EFC's for greater than 9 months

! a) Alternate AAI = 4,150 + AAI

b) Alternate TPC = Calculation from table in EFC Formula 1, STEP 7 using Alternate AAI

c) Alternate TPC / Parents' Number in College = Alternate PC

d) (Alternate PC - PC) / 12 = Monthly PC

e) Monthly PC + PC + SIC + SCA = EFC10

$$(\text{Monthly PC} \times 2) + PC + SIC + SCA = \text{EFC11}$$

$$(\text{Monthly PC} \times 3) + PC + SIC + SCA = \text{EFC12}$$

ALTERNATE EFC FORMULA #2 - INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$

ALTERNATE EFC FORMULA #3 - INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$EFC / 9 = \text{Monthly EFC}$

Monthly EFC = EFC1

Monthly EFC x 2 = EFC2

Monthly EFC x 3 = EFC3

Monthly EFC x 4 = EFC4

Monthly EFC x 5 = EFC5

Monthly EFC x 6 = EFC6

Monthly EFC x 7 = EFC7

Monthly EFC x 8 = EFC8

EFC = EFC10

EFC = EFC11

EFC = EFC12

## ALTERNATE EFC FORMULA #4 - SIMPLIFIED DEPENDENT

STEP 1: EFC's for less than 9 months

$$PC / 9 = \text{Monthly PC}$$

$$SIC/9 = \text{Monthly SIC}$$

$$\text{Monthly PC} + \text{Monthly SIC} = \text{EFC1}$$

$$(\text{Monthly PC} \times 2) + (\text{Monthly SIC} \times 2) = \text{EFC2}$$

$$(\text{Monthly PC} \times 3) + (\text{Monthly SIC} \times 3) = \text{EFC3}$$

$$(\text{Monthly PC} \times 4) + (\text{Monthly SIC} \times 4) = \text{EFC4}$$

$$(\text{Monthly PC} \times 5) + (\text{Monthly SIC} \times 5) = \text{EFC5}$$

$$(\text{Monthly PC} \times 6) + (\text{Monthly SIC} \times 6) = \text{EFC6}$$

$$(\text{Monthly PC} \times 7) + (\text{Monthly SIC} \times 7) = \text{EFC7}$$

$$(\text{Monthly PC} \times 8) + (\text{Monthly SIC} \times 8) = \text{EFC8}$$

STEP 2: EFC's for greater than 9 months

! a) Alternate AAI = AI + 4,150

b) Alternate TPC = Calculation from table in EFC Formula 4, STEP 4, using Alternate AAI

c) Alternate TPC / Parents' Number in College = Alternate PC

d) (Alternate PC - PC) / 12 = Monthly PC

e) Monthly PC + PC + SIC = EFC10

$$(\text{Monthly PC} \times 2) + \text{PC} + \text{SIC} = \text{EFC11}$$

$$(\text{Monthly PC} \times 3) + \text{PC} + \text{SIC} = \text{EFC12}$$

ALTERNATE EFC FORMULA #5 - SIMPLIFIED INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$



ALTERNATE EFC FORMULA #6 - SIMPLIFIED INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$

APPENDIX

INSTITUTIONAL STUDENT INFORMATION RECORD (ISIR) FORMAT  
DRAFT

## ISIR Record Description/Data Dictionary (DRAFT)

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
1		1	1	1	Year Indicator	8, will always be "8" (for 2007-2008)	Left
2		2	10	9	Original Social Security Number  The student's original SSN as initially processed by the CPS.	001010001 to 999999999	Right
3		11	12	2	Original Name ID  The first two characters of last name as processed initially by the CPS.	Uppercase Letters A to Z Space(s) . (Period) ' (Apostrophe) - (Dash) Blank	Left
4		13	14	2	Transaction Number  The CPS transaction number of this ISIR.	01 to 99	Right
5	1	15	30	16	Student's Last Name	Numbers 0 to 9 Uppercase Letters A to Z Space(s) . (Period) ' (Apostrophe) - (Dash) Blank	Left
6	2	31	42	12	Student's First Name	Numbers 0 to 9 Uppercase Letters A to Z Space(s) . (Period) ' (Apostrophe) - (Dash) Blank	Left
7	3	43	43	1	Middle Initial	Uppercase Letters A to Z Blank	Left
8	4	44	78	35	Permanent Mailing Address	Numbers 0 to 9 Uppercase Letters A to Z . (Period) ' (Apostrophe) - (Dash) , (Comma) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
9	5	79	94	16	Student's Permanent City	Numbers 0 to 9 Uppercase Letters A to Z . (Period) ' (Apostrophe) - (Dash) , (Comma) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s)	Left
10	6	95	96	2	Student's Permanent State	Uppercase Letters A to Z Valid two-letter postal code See State/Country/ Jurisdiction Codes in the Processing Codes section of this technical reference. Blank	Left
11	7	97	101	5	Student's Permanent Zip Code	00000 to 99999 Blank	Right
12	9	102	109	8	Student's Date of Birth	Format is CCYYMMDD 19000101 to 19991231 Blank	Left
13	10	110	119	10	Student's Permanent Phone Number	0000000000 to 9999999999 Blank	Right
14	11	120	139	20	Student's Driver's License Number	Numbers 0 to 9 Uppercase Letters A to Z Space(s) - (Dash) * (Asterisk) Blank	Left
15	12	140	141	2	Student's Driver's License State Code	Valid two-letter postal code See State/Country/ Jurisdiction Codes in the Processing Codes section of this technical reference. Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
16	13	142	191	50	Student's E-mail Address	Blank If non-blank: One and only one "@" (At-sign) allowed. Before @: <ul style="list-style-type: none"> <li>at least one valid character</li> <li>all characters in the range of ASCII 33-126, except for the following 12 characters &lt; &gt; ( ) [ ] \ , ; : " @</li> <li>period (.) cannot be first, last or adjacent to another period</li> </ul> After @: <ul style="list-style-type: none"> <li>at least one valid character</li> <li>only letters, digits, hyphen, underscore, and period (A-Z, a-z, 0-9, -, _, .)</li> <li>hyphen, underscore, and period cannot be first, last, or adjacent to a period</li> </ul>	Left
17	14	192	192	1	Student's Citizenship Status  The value the student reported for citizenship.	1 = U.S. citizen (or U.S. National) 2 = Eligible noncitizen 3 = Neither 1 nor 2, not eligible Blank	Left
18	15	193	201	9	Student's Alien Registration Number	000000001 to 999999999 Blank	Left
19	16	202	202	1	Student's Marital Status	1 = Unmarried (Single, Divorced, or Widowed) 2 = Married/Remarried 3 = Separated Blank	Left
20	17	203	208	6	Student's Marital Status Date	Format is CCYYMM 190001 to 200812 Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
21	18	209	210	2	Student's State of Legal Residence	Uppercase Letters A to Z Valid two-letter postal code See State/Country/Jurisdiction Codes in the Processing Codes section of this technical reference. Blank	Left
22	19	211	211	1	Student Legal Resident Before 01-01-2002?	1 = Yes 2 = No Blank	Left
23	20	212	217	6	Student's Legal Residence Date	Format is CCYYMM 190001 to 200812 Blank CPS will accept: CCYYMM CCYY with blank MM Blank CCYY with MM Blank CCYYMM	Left
24	21	218	218	1	Are You Male?	1 = Yes 2 = No Blank	Left
25	22	219	219	1	Do you want Selective Service to register you?	1 = Yes 2 = No Blank	Left
26	23	220	220	1	Degree/Certificate	1 = 1st bachelor's degree 2 = 2nd bachelor's degree 3 = Associate degree (occupational or technical program) 4 = Associate degree (general education or transfer program) 5 = Certificate or diploma for completing an occupational, technical, or educational program of less than two years 6 = Certificate or diploma for completing an occupational, technical, or educational program of at least two years 7 = Teaching Credential Program (non-degree program) 8 = Graduate or professional degree 9 = Other/undecided Blank	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
27	24	221	221	1	Grade Level in College	0 = 1st year, never attended college 1 = 1st year, attended college before 2 = 2nd year/sophomore 3 = 3rd year/junior 4 = 4th year/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional Blank	Left
28	25	222	222	1	Enrollment Status	1 = Full time 2 = ¾ time 3 = ½ time 4 = Less than ½ time 5 = Don't Know Blank	Left
29	26	223	223	1	Interested in Work Study or Student Loans?	1 = Work Study 2 = Student Loans 3 = Both Work Study and Student Loan 4 = Neither 5 = Don't Know	Left
30	27	224	224	1	HS Diploma or GED Received?	1 = Yes 2 = No Blank	Left
31	28	225	225	1	First Bachelor's Degree By 07-01-2007?	1 = Yes 2 = No Blank	Left
32	29	226	226	1	Father's Highest Grade Level Completed	1 = Middle School/Jr. High 2 = High School 3 = College or Beyond 4 = Other/Unknown Blank	Left
33	30	227	227	1	Mother's Highest Grade Level Completed	1 = Middle School/Jr. High 2 = High School 3 = College or Beyond 4 = Other/Unknown Blank	Left
34	31	228	228	1	Drug Conviction Affecting Eligibility	1 = No 2 = Yes (Part Year) 3 = Yes/Don't Know Blank	Left
35	32	229	229	1	Student's Tax Return Completed?	1 = Already Completed 2 = Will File 3 = Will Not File Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
36	33	230	230	1	Student's Type of 2006 Tax Form Used?	1 = IRS 1040 2 = IRS 1040A or 1040 EZ 3 = Foreign Tax Return 4 = A tax return from Puerto Rico, a U.S. Territory or Freely Associated State Blank	Left
37	34	231	231	1	Student Eligible to file 1040A or 1040EZ?	1 = Yes 2 = No 3 = Don't Know Blank	Left
38	35	232	237	6	Student's Adjusted Gross Income from IRS form	-999999 to 999999 Blank	Right Signed
39	36	238	242	5	Student's U.S. Income Tax Paid	00000 to 99999 Blank	Right
40	37	243	244	2	Student's Exemptions Claimed	00 to 99 Blank	Right
41	38	245	250	6	Student's Income Earned from Work	-999999 to 999999 Blank	Right Signed
42	39	251	256	6	Spouse's Income Earned from Work	-999999 to 999999 Blank	Right Signed
43	40	257	261	5	Student's Total Amount from Worksheet A	00000 to 99999 Blank	Right
44	41	262	266	5	Student's Total Amount from Worksheet B	00000 to 99999 Blank	Right
45	42	267	271	5	Student's Total Amount from Worksheet C	00000 to 99999 Blank	Right
46	43	272	277	6	Student's Cash, Savings, and Checking	000000 to 999999 Blank	Right
47	44	278	283	6	Student's Investment Net Worth	000000 to 999999 Blank	Right
48	45	284	289	6	Student's Business and/or Investment Farm Net Worth	000000 to 999999 Blank	Right
49	46	290	291	2	No. of Months Veterans' Education Benefits Received	00 to 12 Blank	Right
50	47	292	295	4	Monthly Veterans' Education Benefits	0000 to 9999 Blank	Right
51	48	296	296	1	Born Before 01-01-1984?	1 = Yes 2 = No Blank	Left
52	49	297	297	1	Working on a Master's or Doctorate Program?	1 = Yes 2 = No Blank	Left
53	50	298	298	1	Is Student Married?	1 = Yes 2 = No Blank	Left
54	51	299	299	1	Have Children you support?	1 = Yes 2 = No Blank	Left



Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
55	52	300	300	1	Have Legal Dependents Other than Children or Spouse?	1 = Yes 2 = No Blank	Left
56	53	301	301	1	Orphan or Ward of Court?	1 = Yes 2 = No Blank	Left
57	54	302	302	1	Are you on active duty in U.S. Armed Forces?	1 = Yes 2 = No Blank	Left
58	55	303	303	1	Veteran of U.S. Armed Forces?	1 = Yes 2 = No Blank	Left
59	56	304	304	1	Parent's Marital Status	1 = Married/Remarried 2 = Single 3 = Divorced/ Separated 4 = Widowed Blank	Left
60	57	305	310	6	Parent's Marital Status Date	Format is CCYYMM 190001 to 200812 Blank	Left
61	58	311	319	9	Father's/Stepfather's Social Security Number	000000000 to 999999999 Blank	Right
62	59	320	335	16	Father's/Stepfather's Last Name	Numbers 0 to 9 Uppercase Letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) Blank	Left
63	60	336	336	1	Father's/Stepfather's First Name Initial	Uppercase Letters A to Z Blank	Left
64	61	337	344	8	Father's/Stepfather's Date of Birth	Format is CCYYMMDD 19000101 to 19991231 Blank	Left
65	62	345	353	9	Mother's/Stepmother's Social Security Number	000000000 to 999999999 Blank	Right
66	63	354	369	16	Mother's/Stepmother's Last Name	Numbers 0 to 9 Uppercase Letters A to Z Space(s) (Period) ' (Apostrophe) (Dash) Blank	Left
67	64	370	370	1	Mother's/Stepmother's First Name Initial	Uppercase Letters A to Z Blank	Left
68	65	371	378	8	Mother's/Stepmother's Date of Birth	Format is CCYYMMDD 19000101 to 19991231 Blank	Left
69	66	379	380	2	Parents' Number of Family Members	00 to 99 Blank	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
70	67	381	381	1	Parents' Number in College (Parents' excluded)	Numbers 0 to 9 Blank	Left
71	68	382	383	2	Parents' State of Legal Residence	Uppercase Letters A to Z Valid two-letter postal code See State/Country/ Jurisdiction Codes in the Processing Codes section of this technical reference. Blank	Left
72	69	384	384	1	Parents Legal Residents before 01-01-2002?	1 = Yes 2 = No Blank	Left
73	70	385	390	6	Parents' Legal Residence Date	Format is CCYYMM 190001 to 200812 Blank CPS will accept: CCYYMM CCYY with blank MM Blank CCYY with MM Blank CCYYMM	Right
74	71	391	391	1	Parent Supplemental Security Income Benefits  Anyone in the parents' household (as defined in positions 379 to 380) receives benefits from the Government Supplemental Security Income program	1 = Yes 2 = No Blank	Left
75	72	392	392	1	Parent Food Stamp Benefits  Anyone in the parents' household (as defined in positions 379 to 380) receives benefits from the Government Food Stamp program	1 = Yes 2 = No Blank	Left
76	73	393	393	1	Parent Free or Reduced Price School Lunch Benefits  Anyone in the parents' household (as defined in positions 379 to 380) receives benefits from the Government Free or Reduced Price School Lunch program	1 = Yes 2 = No Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
77	74	394	394	1	Parent TANF Benefits  Anyone in the parents' household (as defined in positions 379 to 380) receives Temporary Assistance for Needy Family benefits from the Government program	1 = Yes 2 = No Blank	Left
78	75	395	395	1	Parent WIC Benefits  Anyone in the parents' household (as defined in positions 379 to 380) receives benefits from the Government Women, Infants, and Children program	1 = Yes 2 = No Blank	Left
79	76	396	396	1	Parents' Tax Return Completed?	1 = Already Completed 2 = Will File 3 = Will Not File Blank	Left
80	77	397	397	1	Parents' Type of 2006 Tax Form Used?	1 = IRS 1040 2 = IRS 1040A or 1040 EZ 3 = Foreign tax return 4 = A tax return from Puerto Rico, a U.S. Territory or Freely Associated State Blank	Left
81	78	398	398	1	Parents' Eligible to file 1040A or 1040EZ?	1 = Yes 2 = No 3 = Don't Know Blank	Left
82	79	399	404	6	Parents' Adjusted Gross Income from IRS form	-999999 to 999999 Blank	Right Signed
83	80	405	410	6	Parents' U.S. Income Tax Paid	000000 to 999999 Blank	Right
84	81	411	412	2	Parents' Exemptions Claimed	00 to 99 Blank	Right
85	82	413	418	6	Father's/Stepfather's Income Earned from Work	-999999 to 999999 Blank	Right Signed
86	83	419	424	6	Mother's/Stepmother's Income Earned from Work	-999999 to 999999 Blank	Right Signed
87	84	425	429	5	Parents' Total Amount from Worksheet A	00000 to 99999 Blank	Right
88	85	430	434	5	Parents' Total Amount from Worksheet B	00000 to 99999 Blank	Right
89	86	435	439	5	Parents' Total Amount from Worksheet C	00000 to 99999 Blank	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
90	87	440	445	6	Parents' Cash, Savings, and Checking	000000 to 999999 Blank	Right
91	88	446	451	6	Parents' Investment Net Worth	000000 to 999999 Blank	Right
92	89	452	457	6	Parents' Business and/or Investment Farm Net Worth	000000 to 999999 Blank	Right
93	90	458	459	2	Student's Number of Family Members	00 to 99 Blank	Right
94	91	460	460	1	Student's Number in College	0 to 9 Blank	Left
95	92	461	461	1	Student Supplemental Security Income Benefits  Anyone in the student's household (as defined in positions 458 to 459) receives benefits from the Government Supplemental Security Income program	1 = Yes 2 = No Blank	Left
96	93	462	462	1	Student Food Stamp Benefits  Anyone in the student's household (as defined in positions 458 to 459) receives benefits from the Government Food Stamp program	1 = Yes 2 = No Blank	Left
97	94	463	463	1	Student Free or Reduced Price School Lunch Benefits  Anyone in the student's household (as defined in positions 458 to 459) receives benefits from the Government Free or Reduced Price School Lunch program	1 = Yes 2 = No Blank	Left
98	95	464	464	1	Student TANF Benefits  Anyone in the student's household (as defined in positions 458 to 459) receives Temporary Assistance for Needy Family benefits from the Government program	1 = Yes 2 = No Blank	Left

<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
99	96	465	465	1	Student WIC Benefits  Anyone in the student's household (as defined in positions 458 to 459) receives benefits from the Government Women, Infants, and Children program	1 = Yes 2 = No Blank	Left
100	097a	466	471	6	Federal School Code #1	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G	Left
101	97b	472	472	1	Federal School Code #1 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
102	97c	473	478	6	Federal School Code #2	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
103	97d	479	479	1	Federal School Code #2 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
104	97e	480	485	6	Federal School Code #3	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
105	97f	486	486	1	Federal School Code #3 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
106	97g	487	492	6	Federal School Code #4	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
107	97h	493	493	1	Federal School Code #4 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
108	On the Web, not on the FAFSA	494	499	6	Federal School Code #5	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
109	On the Web, not on the FAFSA	500	500	1	Federal School Code #5 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
110	On the Web, not on the FAFSA	501	506	6	Federal School Code #6	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
111	On the Web, not on the FAFSA	507	507	1	Federal School Code #6 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
112	98	508	515	8	Date Application Completed	Format is CCYYMMDD 20070101 to 20081231 Blank	Left
113	99	516	516	1	Signed By  Indicates if only the applicant, or only the parent, or both applicant and parent signed the transaction.	A = Applicant Only B = Applicant and Parent P = Parent Only Blank = No signatures	Left
114	100	517	525	9	Preparer's Social Security Number  Preparer's SSN provided on the transaction.	000000000 to 999999999 Blank	Right
115	101	526	534	9	Preparer's Employer Identification Number (EIN)	000000000 to 999999999 Blank	Left
116	102	535	535	1	Preparer's Signature  Indicates that a preparer signed the transaction.	1 = Yes Blank	Left
117		536	536	1	Dependency Override Indicator  Indicates that a Dependency Override was requested on this transaction.	1 = Dependent to Independent 2 = Dependent to Independent Override Canceled 3 = Dependency Override request failed Blank = Dependency override not requested	Left
118		537	542	6	FAA Federal School Code  Indicates the Federal School Code that requested a dependency override or Adjusted Calculation request.	X00000 to X99999 Valid characters for first position are 0 (Zero), B, E, or G Blank = No Dependency Override or FAA EFC Adjustment done	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
119		543	543	1	Filler	For Federal Student Aid Use Only	Left
120		544	544	1	Dependency Status  Determined by CPS based on Dependency Status data provided.	D = Dependent, calculated EFC provided I = Independent, calculated EFC provided X = Dependent rejected, no EFC calculated Y = Independent rejected, no EFC calculated	Left
121		545	546	2	Transaction Data Source/Type Code  Indicates the origin of the transaction.  The first byte describes source: 1 = Electronic 2 = Web Student 3 = Web FAA 4 = Paper 5 = CPS 6 = FSAIC  The second byte describes type: A = Application B = Application Spanish C = Correction D = Drug Abuse Hold Release E = EZ FAFSA F = EZ FAFSA Spanish G = EZ FAFSA Renewal H = EZ FAFSA Renewal Spanish J = Correction Application K = Correction Application Spanish M = DHS Secondary Confirmation N = NSLDS Postscreening P = Reprocessing R = Renewal Application S = Signature Page T = Spanish Renewal Application W = SSA Death File Match	1A = Application 1C = Correction Full SAR 2A = Application 2B = Application Spanish 2C = Correction 2E = EZ FAFSA 2F = EZ FAFSA Spanish 2G = EZ FAFSA Renewal Application 2H = EZ FAFSA Renewal Spanish 2R = Renewal Application 2T = Spanish Renewal Application 3A = Application 3C = Correction 3E = EZ FAFSA 3G = EZ FAFSA Renewal Application 3R = Renewal Application 4A = Application 4B = Application Spanish 4C = Correction 4J = Correction Application 4K = Correction Application Spanish 5D = Drug Abuse Hold Release 5M = DHS Secondary Confirmation 5N = NSLDS Postscreening 5P = Reprocessed Record 5S = CPS Signature 5W = SSA Death File Match 6C = Correction (Student and Image Error)	Left
122		547	554	8	Transaction Receipt Date  Date the transaction was received by the CPS.	Format is CCYYMMDD 20070101 to 20081231	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
123		555	555	1	Assumption Override 1- Parents' Number in College assumed to be 1 when the number in college is greater than 6.	1 = Yes Blank	Left
124		556	556	1	Assumption Override 2- Parents' AGI assumed equal to sum of father and mother earned income portions.	1 = Yes Blank	Left
125		557	557	1	Assumption Override 3- Student's Number in College assumed to be 1 when number in college equals number in the household and both are greater than 2.	1 = Yes Blank	Left
126		558	558	1	Assumption Override 4- Student's AGI assumed equal to the sum of student and spouse earned income portions.	1 = Yes Blank	Left
127		559	559	1	Assumption Override 5- Parents' Total from Worksheet C assumed to be zero.	1 = Yes Blank	Left
128		560	560	1	Assumption Override 6- Student's Total from Worksheet C assumed to be zero.	1 = Yes Blank	Left
129		561	567	7	Electronic Transaction Indicator (ETI) Destination Number  TG number assigned by SAIG.	"TGXXXXXX" where XXXXX is the 5-digit numeric code assigned by SAIG staff Blank	Left
130		568	568	1	Reject Override 3- Student's taxes paid is greater than zero and equal to or greater than AGI.	1 = Yes Blank	Left
131		569	569	1	Reject Override 12- Parents' taxes paid is greater than zero and equal to or greater than AGI.	1 = Yes Blank	Left
132		570	570	1	Reject Override A- Date of Birth year is 1900 to 1932.	1 = Yes Blank	Left
133		571	571	1	Reject Override B- Date of Birth since September 1, 1991.	1 = Yes Blank	Left



<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
134		572	572	1	Reject Override C- Parent's or independent student's taxes paid is greater than zero and greater than or equal to a fixed percentage of the AGI, but not equal to or greater than AGI.	1 = Yes Blank	Left
135		573	573	1	Filler	For Federal Student Aid Use Only	Left
136		574	574	1	Reject Override G- Dependent student's taxes paid is greater than zero and greater than or equal to a fixed percentage of the AGI, but not equal to or greater than AGI.	1 = Yes Blank	Left
137		575	575	1	Reject Override J- Father's SSN contains all zeroes and reported as a tax filer.	1 = Yes Blank	Left
138		576	576	1	Reject Override K- Mother's SSN contains all zeroes and reported as a tax filer.	1 = Yes Blank	Left
139		577	577	1	Reject Override N- Missing first or last name.	1 = Yes Blank	Left
140		578	578	1	Filler	For Federal Student Aid Use Only	Left
141		579	579	1	Reject Override W- Unusually high number of family members.	1 = Yes Blank	Left
142		580	585	6	Filler	For Federal Student Aid Use Only	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
143	On the Web, not on the FAFSA	586	635	50	Parent's E-mail Address	Blank If non-blank: One and only one "@" (At-sign) allowed. Before @: <ul style="list-style-type: none"> <li>at least one valid character</li> <li>all characters in the range of ASCII 33-126, except for the following 12 characters &lt; &gt; ( ) [ ] \ , ; : " @</li> <li>period (.) cannot be first, last or adjacent to another period</li> </ul> After @: <ul style="list-style-type: none"> <li>at least one valid character</li> <li>only letters, digits, hyphen, underscore, and period (A-Z, a-z, 0-9, -, _, .)</li> <li>hyphen, underscore, and period cannot be first, last, or adjacent to a period</li> </ul>	Left
144		636	658	23	Filler	For Federal Student Aid Use Only	Left
145	8	659	667	9	Student's Current Social Security Number  Student's SSN on this transaction. It will be different from the student's original SSN only if it has been changed.	001010001 to 999999999	Right
146		668	669	2	Correction Applied against Transaction Number	01 to 99 Blank = Transaction not a result of a correction	Left
147		670	673	4	Filler	For Federal Student Aid Use Only	Left
148		674	674	1	FAA Adjustment  Indicates whether a FAA requested an EFC adjustment and if it was processed.	1 = EFC Adjustment processed 2 = EFC Adjustment request failed Blank = No EFC Adjustment requested	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
149		675	676	2	<p>Application Data Source/Type Code</p> <p>Indicates the origin of the initial application.</p> <p>The first byte describes source:  1 = Electronic  2 = Web Student  3 = Web FAA  4 = Paper</p> <p>The second byte describes type:  A = Application  B = Application Spanish  E = EZ FAFSA  F = EZ FAFSA Spanish  G = EZ FAFSA Renewal  H = EZ FAFSA Renewal Spanish  J = Correction Application  K = Correction Application Spanish  R = Renewal Application  T = Spanish Renewal Application</p>	1A = Application 2A = Application 2B = Application Spanish 2R = Renewal Application 2E = EZ FAFSA 2F = EZ FAFSA Spanish 2G = EZ FAFSA Renewal Application 2H = EZ FAFSA Renewal Spanish 2T = Spanish Renewal Application 3A = Application 3R = Renewal Application 3E = EZ FAFSA 3G = EZ FAFSA Renewal Application 4A = Application 4B = Application Spanish 4J = Correction Application 4K = Correction Application Spanish	Left
150		677	684	8	<p>Application Receipt Date</p> <p>Date the application was received by the CPS.</p>	Format is CCYYMMDD 20070101 to 20081231	Left
151		685	685	1	<p>Address Only Change Flag</p> <p>If an address is the only change to a record, this field will be populated.  Corrections to the Signed By and Special Handle fields may also be included with the address correction.</p>	1 = Student's Mailing Address corrected 2 = Student's E-mail Address corrected 3 = Parent's E-Mail Address corrected 4 = More than one of the above corrected Blank = No change	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
152		686	686	1	<p>CPS Pushed ISIR Flag</p> <p>This flag is set to identify transactions that are automatically sent to schools.</p> <p>Examples are:  EFC Change Flag is set;  SAR C Flag changes between correction and transaction being corrected; Record became selected for verification;  Rejected to EFC;  EFC to Rejected; or  transaction is system-generated</p>	<p>Y = Transaction automatically sent to school  Blank = Transaction not sent to school</p>	Left
153		687	687	1	<p>EFC Change Flag</p> <p>Indicates if the EFC has gone up or down from the transaction being applied against.</p>	<p>1 = EFC increase  2 = EFC decrease  Blank = No change</p>	Left
154		688	688	1	<p>Student Last Name/SSN Change Flag</p> <p>Indicates whether the student's last name and/or Social Security Number (SSN) have been changed.</p>	<p>N = Last Name change  S = Social Security Number change  B = Social Security Number and Last Name change  Blank = No change</p>	Left
155		689	689	1	<p>Reject Status Change Flag</p> <p>If the Rejected Status Change flag is set or removed from the previous transaction, this field is populated.</p>	<p>Y = Reject Status has changed  Blank = No change to flag</p>	Left
156		690	690	1	<p>SAR C Change Flag</p> <p>If the SAR C Flag is set or removed from the previous transaction, this field is populated.</p>	<p>Y = SAR C Flag has changed  Blank = No change to flag</p>	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
157		691	691	1	Verification Selection Change Flag  If the Verification Selection Change Flag is set from the previous transaction, this field is populated. This flag is set to a Y only on the transaction that was initially selected for verification.	Y = Transaction is now selected for verification when the previous transaction was not selected Blank = Transaction not initially selected for verification	Left
158		692	694	3	Compute Number	000 to 999	Right
159		695	695	1	Source of Correction	A = Applicant D = CPS S = School Blank	Left
160		696	696	1	Duplicate SSN Indicator  Indicates if another filer is using this original SSN in their original SSN field.	Y = Another filer also using this SSN Blank = N/A	Left
161		697	697	1	Graduate Flag	Y = Yes response to BA question and/or Graduate status question Blank = Graduate Flag not set	Left
162		698	698	1	Pell Grant Eligibility Flag  Indicates transaction has been determined eligible for a Federal Pell Grant by the CPS.	Y = This transaction determined eligible for a Federal Pell Grant. Blank = This transaction determined ineligible for a Federal Pell Grant	Left
163		699	706	8	Transaction Processed Date  Date that CPS computed this transaction.	Format is CCYYMMDD 20070101 to 20081231	Left
164		707	707	1	Processed Record Type	C = Correction Application H = Correction Blank = Initial Application	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
165		708	721	14	Reject Reason Codes  Alpha/numeric character indicating why an application or correction has been rejected.  See the Processing Codes section for specific code tables and details.	Uppercase Letters A to Z Numbers 01 to 99 Blank = Applicant not rejected  Up to seven 2-character codes	Left
166		722	723	2	Reprocessed Reason Code  The code indicating why the CPS reprocessed an ISIR. An electronic message will be sent to destination numbers identifying definition of the code.	01 to 99 Blank = Not a reprocessed transaction	Left
167		724	724	1	SAR C Flag	Y = C flag set, resolution required on one or more match results Blank = No flag set	Left
168		725	725	1	Automatic Zero EFC Indicator  The Automatic Zero EFC Indicator is automatically set if simplified needs test met and taxable income is \$20,000 or less.	Y = EFC set to zero based on income criteria Blank = Flag not set	Left
169		726	726	1	Simplified Needs Test (SNT)  Applicant meets certain criteria for tax filing status and income level and is not required to provide asset information.	Y = SNT met N = SNT not met or insufficient information to determine SNT eligibility	Left
170		727	727	1	Parents' Calculated 2006 Tax Status  CPS determination of tax filing status.	1, 2, or 3 = Tax Filer 4 or 5 = Non-Tax Filer Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
171		728	728	1	Student's Calculated 2006 Tax Status  CPS determination of tax filing status.	1, 2, or 3 = Tax Filer 4 or 5 = Non-Tax Filer Blank	Left
172		729	729	1	Assumed Citizenship	1 = Assumed student is a citizen 2 = Assumed student is an eligible noncitizen Blank = No assumption	Left
173		730	730	1	Assumed Student's Marital Status	1 = Assumed unmarried 2 = Assumed married/remarried Blank = No assumption	Left
174		731	736	6	Assumed Student's AGI	-999999 to 999999 Blank = No assumption	Right Signed
175		737	741	5	Assumed Student's U.S. Tax Paid	00000 to 99999 Blank = No assumption	Left
176		742	747	6	Assumed Student's Income from Work	-999999 to 999999 Blank = No assumption	Right Signed
177		748	753	6	Assumed Spouse's Income from Work	-999999 to 999999 Blank = No assumption	Right Signed
178		754	758	5	Assumed Student's Total from Worksheet C	00000 to 99999 Blank = No assumption	Left
179		759	759	1	Assumed Date of Birth Prior	1 = Assumed Yes 2 = Assumed No Blank = No assumption	Left
180		760	760	1	Assumed Student Is Married/Remarried	1 = Assumed Yes 2 = Assumed No Blank = No assumption	Left
181		761	761	1	Assumed Have Children You Support?	1 = Assumed Yes 2 = Assumed No Blank = No assumption	Left
182		762	762	1	Assumed Have Legal Dependents Other than Children or Spouse?	2 = Assumed no legal dependents Blank = No assumption	Left
183		763	763	1	Filler	For Federal Student Aid Use Only	Left
184		764	765	2	Assumed Student's # in Family	00 to 99 Blank = No assumption	Left
185		766	766	1	Assumed Student's # in College	0 to 9 Blank = No assumption	Left
186		767	767	1	Assumed Parents' Marital Status	1 = Assumed married/remarried 2 = Assumed single Blank = No assumption	Left
187		768	768	1	Assumed Father's/Stepfather's SSN	Y = Assumed SSN Blank	Left
188		769	769	1	Assumed Mother's/Stepmother's SSN	Y = Assumed SSN Blank	Left
189		770	771	2	Assumed Parents' # in Family	00 to 99 Blank = No assumption	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
190		772	772	1	Assumed Parents' # in College	0 to 9 Blank = No assumption	Left
191		773	778	6	Assumed Parents' AGI	-999999 to 999999 Blank = No assumption	Right Signed
192		779	784	6	Assumed Parents' U.S. Tax Paid	000000 to 999999 Blank = No assumption	Left
193		785	790	6	Assumed Father's/ Stepfather's Income Earned from Work	-999999 to 999999 Blank = No assumption	Right Signed
194		791	796	6	Assumed Mother's/ Stepmother's Income Earned from Work	-999999 to 999999 Blank = No assumption	Right Signed
195		797	801	5	Assumed Parents' Total from Worksheet C	00000 to 99999 Blank = No assumption	Left
196		802	806	5	Primary EFC  The primary 9-month EFC calculated. Full Needs Test (FNT), unless Simplified Needs Test (SNT) met.	00000 to 99999 Blank = None Calculated	Left
197		807	811	5	Secondary EFC  The secondary 9-month EFC calculated. Full Needs Test (FNT) provided only if Simplified Needs Test (SNT) is met and asset information is provided.	00000 to 99999 Blank = None Calculated	Left
198		812	816	5	Filler	For Federal Student Aid Use Only	Left
199		817	817	1	Primary EFC Type  Identifies formula type used to calculate the primary EFC.  Full Needs Test (FNT)  Simplified Needs Test (SNT)	1 = FNT: Dependent 2 = FNT: Independent without dependents other than a spouse 3 = FNT: Independent with dependents other than a spouse 4 = SNT: Dependent 5 = SNT: Independent without dependents other than a spouse 6 = SNT: Independent with dependents other than a spouse Blank = None Calculated	Left



Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
200		818	818	1	Secondary EFC Type  Identifies formula type used to calculate secondary EFC.  Full Needs Test (FNT)  Simplified Needs Test (SNT)	1 = FNT: Dependent 2 = FNT: Independent without dependents other than a spouse 3 = FNT: Independent with dependents other than a spouse 4 = SNT: Dependent 5 = SNT: Independent without dependents other than a spouse 6 = SNT: Independent with dependents other than a spouse Blank = None Calculated	Left
201		819	823	5	Primary Alternate Month 1  The primary alternate EFC used by FAO in determining eligibility based on periods of time other than 9 months.	00000 to 99999 Blank = None Calculated	Left
202		824	828	5	Primary Alternate Month 2	00000 to 99999 Blank = None Calculated	Left
203		829	833	5	Primary Alternate Month 3	00000 to 99999 Blank = None Calculated	Left
204		834	838	5	Primary Alternate Month 4	00000 to 99999 Blank = None Calculated	Left
205		839	843	5	Primary Alternate Month 5	00000 to 99999 Blank = None Calculated	Left
206		844	848	5	Primary Alternate Month 6	00000 to 99999 Blank = None Calculated	Left
207		849	853	5	Primary Alternate Month 7	00000 to 99999 Blank = None Calculated	Left
208		854	858	5	Primary Alternate Month 8	00000 to 99999 Blank = None Calculated	Left
209		859	863	5	Primary Alternate Month 10	00000 to 99999 Blank = None Calculated	Left
210		864	868	5	Primary Alternate Month 11	00000 to 99999 Blank = None Calculated	Left
211		869	873	5	Primary Alternate Month 12	00000 to 99999 Blank = None Calculated	Left
212		874	878	5	Secondary Alternate Month 1  The secondary alternate EFC used by FAO in determining eligibility based on periods of time other than 9 months.	00000 to 99999 Blank = None Calculated	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
213		879	883	5	Secondary Alternate Month 2	00000 to 99999 Blank = None Calculated	Left
214		884	888	5	Secondary Alternate Month 3	00000 to 99999 Blank = None Calculated	Left
215		889	893	5	Secondary Alternate Month 4	00000 to 99999 Blank = None Calculated	Left
216		894	898	5	Secondary Alternate Month 5	00000 to 99999 Blank = None Calculated	Left
217		899	903	5	Secondary Alternate Month 6	00000 to 99999 Blank = None Calculated	Left
218		904	908	5	Secondary Alternate Month 7	00000 to 99999 Blank = None Calculated	Left
219		909	913	5	Secondary Alternate Month 8	00000 to 99999 Blank = None Calculated	Left
220		914	918	5	Secondary Alternate Month 10	00000 to 99999 Blank = None Calculated	Left
221		919	923	5	Secondary Alternate Month 11	00000 to 99999 Blank = None Calculated	Left
222		924	928	5	Secondary Alternate Month 12	00000 to 99999 Blank = None Calculated	Left
223		929	935	7	TI: Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
224		936	942	7	ATI: Allowances Against Total Income	0000000 to 9999999 Blank = None Calculated	Left
225		943	949	7	STX: State and Other Tax Allowance	-9999999 to 9999999 Blank = None Calculated	Right Signed
226		950	956	7	EA: Employment Allowance	0000000 to 9999999 Blank = None Calculated	Left
227		957	963	7	IPA: Income Protection Allowance	0000000 to 9999999 Blank = None Calculated	Left
228		964	970	7	AI: Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
229		971	977	7	CAI: Contribution From Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
230		978	986	9	DNW: Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
231		987	995	9	NW: Net Worth	000000000 to 999999999 Blank = None Calculated	Left
232		996	1004	9	APA: Asset Protection Allowance	000000000 to 999999999 Blank = None Calculated	Left
233		1005	1011	7	PCA: Parents' Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed
234		1012	1018	7	AAI: Adjusted Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
235		1019	1025	7	TSC: Total Student Contribution	0000000 to 9999999 Blank = None Calculated	Left
236		1026	1032	7	TPC: Total Parent Contribution	0000000 to 9999999 Blank = None Calculated	Left
237		1033	1039	7	PC: Parents' Contribution	0000000 to 9999999 Blank = None Calculated	Left

<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
238		1040	1046	7	STI: Student's Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
239		1047	1053	7	SATI: Student's Allowance against Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
240		1054	1060	7	SIC: Dependent Students' Income Contribution	0000000 to 9999999 Blank = None Calculated	Left
241		1061	1069	9	SDNW: Student's Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
242		1070	1076	7	SCA: Student's Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed
243		1077	1083	7	FTI: FISAP Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
244		1084	1090	7	SEC TI: Secondary Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
245		1091	1097	7	SEC ATI: Secondary Allowances Against Total Income	0000000 to 9999999 Blank = None Calculated	Left
246		1098	1104	7	SEC STX: Secondary State Tax Allowance	-9999999 to 9999999 Blank = None Calculated	Right Signed
247		1105	1111	7	SEC EA: Secondary Employment Allowance	0000000 to 9999999 Blank = None Calculated	Left
248		1112	1118	7	SEC IPA: Secondary Income Protection Allowance	0000000 to 9999999 Blank = None Calculated	Left
249		1119	1125	7	SEC AI: Secondary Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
250		1126	1132	7	SEC CAI: Secondary Contribution From Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
251		1133	1141	9	SEC DNW: Secondary Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
252		1142	1150	9	SEC NW: Secondary Net Worth	000000000 to 999999999 Blank = None Calculated	Left
253		1151	1159	9	SEC APA: Secondary Asset Protection Allowances	000000000 to 999999999 Blank = None Calculated	Left
254		1160	1166	7	SEC PCA: Secondary Parents' Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed
255		1167	1173	7	SEC AAI: Secondary Adjusted Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
256		1174	1180	7	SEC TSC: Secondary Total Student Contribution	0000000 to 9999999 Blank = None Calculated	Left
257		1181	1187	7	SEC TPC: Secondary Total Parent Contribution	0000000 to 9999999 Blank = None Calculated	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
258		1188	1194	7	SEC PC: Secondary Parents' Contribution	0000000 to 9999999 Blank = None Calculated	Left
259		1195	1201	7	SEC STI: Secondary Student's Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
260		1202	1208	7	SEC SATI: Secondary Student's Allowance Against Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
261		1209	1215	7	SEC SIC: Secondary Student's Dependent Income Contribution	0000000 to 9999999 Blank = None Calculated	Left
262		1216	1224	9	SEC SDNW: Secondary Student's Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
263		1225	1231	7	SEC SCA: Secondary Student's Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed
264		1232	1238	7	SEC FTI: Secondary FISAP Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
265		1239	1373	135	Correction Flags  See the Field Name and Position Cross-Reference Table in the Processing Codes section of this technical reference.  Each correction flag byte corresponds to a specific SAR field and indicates fields that have been corrected.	0 = No Correction Made 1 = Field Corrected on this transaction 2 = Field Corrected on previous transaction	Right
266		1374	1508	135	Highlight Flags  See the Field Name and Position Cross-Reference Table in the Processing Codes section of this technical reference.  Each highlight flag byte corresponds to a specific SAR field and indicates fields highlighted in boldface on the SAR.	0 = No Highlight Made 1 = Field Highlighted  Each highlight flag byte corresponds to a specific SAR field	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
267		1509	1643	135	FAFSA Data Verify Flags  See the Field Name and Position Cross-Reference Table in the Processing Codes section of this technical reference.  Each FAFSA Data Verify flag byte corresponds to a specific SAR field and indicates fields corrected to the same value on the transaction being corrected.	0 = Not corrected to the same value 1 = Corrected to the same value 2 = Asked to be verified	Right
268		1644	1644	1	DHS Match Flag  Results from DHS Match for applicants who met criteria to be sent to match.	Y = Citizenship confirmed N = Citizenship not confirmed Blank = Record not sent to DHS	Left
269		1645	1645	1	Secondary DHS Match Flag  Results from DHS Confirmation for applicants who failed Primary Confirmation.	C = DHS has not yet confirmed eligible noncitizen status N = DHS did not confirm eligible noncitizen status P = Pending Results of Secondary Confirmation X = DHS did not have enough information to confirm eligible noncitizen status Y = Citizenship status confirmed by DHS Blank = N/A	Left
270		1646	1660	15	Filler	For Federal Student Aid Use Only	Left
271		1661	1675	15	DHS Verification Number  Identification # provided by the Department of Homeland Security indicating that primary verification was performed.	Uppercase Letters A to Z 0000000000000000 9999999999999999 Blank	Left
272		1676	1676	1	Filler	For Federal Student Aid Use Only	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
273		1677	1677	1	NSLDS Match Flag  Results of the NSLDS Match.	1 = Student not in Default or Overpayment 2 = Default 3 = Overpayment 4 = Default and Overpayment 7 = Match but no data provided 8 = Record not sent to NSLDS	Left
274		1678	1683	6	NSLDS Post-Screening Reason Code  The student's eligibility has changed since the previous prescreening.  This field can contain up to 3 reason codes at 2 bytes each.	01 = Default added 02 = Overpayment added 03 = Default resolved 04 = Overpayment resolved 05 = Master Promissory Note status change 06 = Loan went into Discharged status 07 = Loan out of Discharged status 08 = Closed school 09 = Exceeded Subsidized loan limit 10 = Exceeded Combined loan limit 11 = No longer exceeding subsidized loan status 12 = No longer exceeding combined loan limit 13 = Change in type of discharged loan 14 = Loan entered active bankruptcy 15 = PLUS Master Promissory Note status change 16 = Grad PLUS Master Promissory Note status change 17 = Fraud Conviction added 18 = Fraud Conviction resolved 99 = Other Blank = Not an NSLDS postscreening transaction	Left
275		1684	1692	9	Filler	For ED Use Only	Left

<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
276		1693	1693	1	Father's/Stepfather's SSN Match Flag  Results from SSN Match with Social Security Administration.	1 = No match on SSN 2 = SSN and Name match, no match on DOB 3 = SSN match, no match on Name 4 = SSN, Name, and DOB match 5 = SSN, Name, DOB match with Date of Death 8 = Record not sent to SSA	Left
277		1694	1702	9	Filler	For ED Use Only	Left
278		1703	1703	1	Mother's/Stepmother's SSN Match Flag  Results from SSN Match with Social Security Administration.	1 = No match on SSN 2 = SSN and Name match, no match on DOB 3 = SSN match, no match on Name 4 = SSN, Name, and DOB match 5 = SSN, Name, DOB match with Date of Death 8 = Record not sent to SSA	Left
279		1704	1704	1	Selective Service Match Flag  Results from SS Match for applicants who met criteria to be sent to match.	Y = Registration status confirmed N = Registration status not confirmed T = Temporarily Exempt Blank = Record not sent to Selective Service	Left
280		1705	1705	1	Selective Service Registration Flag  Results from student's request to be registered with Selective Service.	Y = Registration completed N = Registration not completed T = Temporarily Exempt Blank = Record not sent to Selective Service.	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
281		1706	1706	1	SSA Citizenship Flag  Results from Citizenship Match with Social Security Administration.	A = U.S. citizen B = Legal alien, eligible to work C = Legal alien, not eligible to work D = Other E = Alien, student restricted, work authorized F = Conditionally legalized alien N = Unable to verify citizenship due to no match on SSN, name or date of birth * = Foreign Blank = Domestic born (U.S. Citizen)	Left
282		1707	1714	8	Filler	For ED Use Only	Left
283		1715	1715	1	SSN Match Flag  Results from SSN Match with Social Security Administration.	1 = No match on SSN 2 = SSN and name match, no match on DOB 3 = SSN match, no match on name 4 = SSN, Name, and DOB match 5 = SSN, name, DOB match with Date of Death 8 = Record not sent to SSA	Left
284		1716	1716	1	VA Match Flag  Results of the Veterans Affairs Match.	1 = Veteran status confirmed 2 = Record found on VA database but not a qualifying Veteran 3 = Record not found on VA database 4 = Record found on VA database but applicant on active duty 8 = Record not sent to VA Blank	Left
285		1717	1736	20	SAR Acknowledgement Comment Codes  Codes are entered from left to right by the CPS and the unused positions are filled with zeros.	10 two-digit codes for comments appearing on the SAR Acknowledgement.	Right



<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
286		1737	1796	60	<p>Comment Codes</p> <p>Comments provided by the CPS to further communication of important results and processing information.</p>	<p>Twenty 3-digit numeric comment codes. (See Comment Code Text information in the Processing Codes section of this technical reference.)</p> <p>Unused positions contain all zeroes.</p>	Left
287		1797	1797	1	<p>Electronic Federal School Code Indicator</p> <p>Identifies which school listed in ISIR fields 99, 101, 103, 105, 107, or 109 initiated this transaction.</p>	<p>1 = Federal School Code #1</p> <p>2 = Federal School Code #2</p> <p>3 = Federal School Code #3</p> <p>4 = Federal School Code #4</p> <p>5 = Federal School Code #5</p> <p>6 = Federal School Code #6</p> <p>Blank = No Federal School Code</p>	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
288		1798	1798	1	<p>Electronic Transaction Indicator (ETI) Flag</p> <p>The ETI is set to indicate if the school receiving the ISIR submitted input to generate the ISIR transaction, or did not generate the transaction but was listed on the record. It also indicates whether the type of ISIR is a daily, requested, or pushed ISIR. An ETI Flag will be set for each school choice.</p>	<p>A = Correction to Academic Competitiveness Grant (ACG) data only</p> <p>0 = School generated transaction and is an ISIR Daily school (Applications) (IDAP)</p> <p>1 = School did not generate transaction and is an ISIR Daily school (Automatic) (IDSA)</p> <p>2 = School generated transaction and is an ISIR Request school (ISRF)</p> <p>3 = School did not generate transaction and is an ISIR Request school (Applications) (ISRF)</p> <p>4 = School generated transaction and is an ISIR Daily school, ISIR is CPS Pushed ISIR (Corrections) (IGCO)</p> <p>5 = School did not generate transaction and is an ISIR Daily school, ISIR is CPS Pushed ISIR (Automatic) (IGSA)</p> <p>6 = School generated transaction and is an ISIR Request school, ISIR is CPS Pushed ISIR (Corrections) (IGCO)</p> <p>7 = School did not generate transaction and is an ISIR Request school, ISIR is CPS Pushed ISIR (Automatic) (IGSA)</p> <p>8 = School did not generate transaction and is an ISIR Daily school, ISIR is CPS Pushed System-Generated ISIR (IGSG)</p> <p>9 = School did not generate transaction and is an ISIR Request school, ISIR is CPS Pushed System-Generated ISIR (IGSG)</p> <p>Blank = No destination code associated or school not participating</p>	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
289		1799	1804	6	<p>Multi School Code Flags</p> <p>This field indicates the school codes being serviced by the destination point that will receive this ISIR transaction and identify which school originated the transaction. The appropriate ETI flag will be listed in your school codes position.</p> <p>If the first byte of this field has a 1, then the Federal School Code listed in Federal School Code #1 did not generate transaction and is an ISIR Daily school. In addition, if the second byte of this field has a 0, then Federal School Code #2 generated transaction and is an ISIR Daily school.</p>	<p>A = Correction to Academic Competitiveness Grant (ACG) data only</p> <p>0 = School generated transaction and is an ISIR Daily school (Applications) (IDAP)</p> <p>1 = School did not generate transaction and is an ISIR Daily school (Automatic) (IDSA)</p> <p>2 = School generated transaction and is an ISIR Request school (ISRF)</p> <p>3 = School did not generate transaction and is an ISIR Request school (Applications) (ISRF)</p> <p>4 = School generated transaction and is an ISIR Daily school, ISIR is CPS Pushed ISIR (Corrections) (IGCO)</p> <p>5 = School did not generate transaction and is an ISIR Daily school, ISIR is CPS Pushed ISIR (Automatic) (IGSA)</p> <p>6 = School generated transaction and is an ISIR Request school, ISIR is CPS Pushed ISIR (Corrections) (IGCO)</p> <p>7 = School did not generate transaction and is an ISIR Request school, ISIR is CPS Pushed ISIR (Automatic) (IGSA)</p> <p>8 = School did not generate transaction and is an ISIR Daily school, ISIR is CPS Pushed System-Generated ISIR (IGSG)</p> <p>9 = School did not generate transaction and is an ISIR Request school, ISIR is CPS Pushed System-Generated ISIR (IGSG)</p> <p>Blank = No destination code associated or school not participating</p>	Left
290		1805	1808	4	Verification Tracking Flag	0000 to 9999 Blank	Left
291		1809	1809	1	Student Is Selected For Verification	Y = Selected N = Not Selected * = A subsequent transaction was selected for verification	Left
292		1810	1832	23	Filler	For Federal Student Aid Use Only	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
293		1833	1834	2	NSLDS Transaction Number  Reflects the latest transaction number for which NSLDS updated information.	01 to 99 Blank	Right
294		1835	1835	1	NSLDS Database Results Flag  Results from NSLDS Match for applicants who met criteria to be sent to match.	1 = Record matched, data sent 2 = SSN match, no name or date of birth match, no data sent 3 = SSN not found in NSLDS 4 = Full match, no relevant data to send 5 = Real-time transaction not sent to NSLDS Blank = Record not sent, all NSLDS fields will be blank	Left
295		1836	1836	1	Filler	For Federal Student Aid Use Only	Left
296		1837	1837	1	NSLDS ACG Overpayment Flag	D = Deferred N = N/A S = Satisfactory Payment Arrangements F = Fraud W = Waived Y = Overpayment	Left
297		1838	1845	8	NSLDS ACG Overpayment Contact	Numeric school code or region code N/A Y (more than one)	Left
298		1846	1846	1	NSLDS Pell Overpayment Flag	D = Deferred N = N/A S = Satisfactory Payment Arrangements F = Fraud W = Waived Y = Overpayment	Left
299		1847	1854	8	NSLDS Pell Overpayment Contact	Numeric school code or region code N/A Y (more than one)	Left
300		1855	1855	1	NSLDS SEOG Overpayment Flag	D = Deferred N = N/A S = Satisfactory Payment Arrangements F = Fraud W = Waived Y = Overpayment	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
301		1856	1863	8	NSLDS SEOG Overpayment Contact	Numeric school code or region code N/A Y (more than one)	Left
302		1864	1864	1	NSLDS Perkins Overpayment Flag	D = Deferred N = N/A S = Satisfactory Payment Arrangements F = Fraud W = Waived Y = Overpayment	Left
303		1865	1872	8	NSLDS Perkins Overpayment Contact	Numeric school code or region code N/A Y (more than one)	Left
304		1873	1873	1	NSLDS National SMART Grant Overpayment Flag	D = Deferred N = N/A S = Satisfactory Payment Arrangements F = Fraud W = Waived Y = Overpayment	Left
305		1874	1881	8	NSLDS National SMART Grant Overpayment Contact	Numeric school code or region code N/A Y (more than one)	Left
306		1882	1882	1	NSLDS Defaulted Loan Flag	Y or N	Left
307		1883	1883	1	NSLDS Discharged Loan Flag	C = Conditional D = Death M = Multiple N = None P = Permanent R = Reaffirmed	Left
308		1884	1884	1	NSLDS Loan Satisfactory Repayment Flag	Y or N	Left
309		1885	1885	1	NSLDS Active Bankruptcy Flag	Y or N	Left
310		1886	1891	6	NSLDS Aggregate Subsidized Outstanding Principal Balance	Numeric N/A	Left
311		1892	1897	6	NSLDS Aggregate Unsubsidized Outstanding Principal Balance	Numeric N/A	Left
312		1898	1903	6	NSLDS Aggregate Combined Outstanding Principal Balance	Numeric N/A	Left
313		1904	1909	6	NSLDS Aggregate Unallocated Consolidated Outstanding Principal Balance	Numeric N/A	Left

<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
314		1910	1915	6	NSLDS Aggregate Subsidized Pending Disbursement	Numeric N/A	Left
315		1916	1921	6	NSLDS Aggregate Unsubsidized Pending Disbursement	Numeric N/A	Left
316		1922	1927	6	NSLDS Aggregate Combined Pending Disbursement	Numeric N/A	Left
317		1928	1933	6	NSLDS Aggregate Subsidized Total	Numeric N/A	Left
318		1934	1939	6	NSLDS Aggregate Unsubsidized Total	Numeric N/A	Left
319		1940	1945	6	NSLDS Aggregate Combined Total	Numeric N/A	Left
320		1946	1951	6	NSLDS Unallocated Consolidated Total	Numeric N/A	Left
321		1952	1957	6	NSLDS Perkins Cumulative Disbursement Amount	Numeric N/A	Left
322		1958	1963	6	NSLDS Perkins Current Year Disbursement Amount	Numeric N/A	Left
323		1964	1964	1	NSLDS Defaulted Loan Change Flag	# N	Left
324		1965	1965	1	NSLDS Discharged Loan Change Flag	# N	Left
325		1966	1966	1	NSLDS Loan Satisfactory Repayment Change Flag	# N	Left
326		1967	1967	1	NSLDS Active Bankruptcy Change Flag	# N	Left
327		1968	1968	1	NSLDS Overpayments Change Flag	# N	Left
328		1969	1969	1	NSLDS Aggregate Loan Change Flag	# N	Left
329		1970	1970	1	NSLDS Perkins Loan Change Flag	# N	Left
330		1971	1971	1	NSLDS Pell Payment Change Flag	# N	Left
331		1972	1972	1	NSLDS ACG Payment Change Flag	# N	Left
332		1973	1973	1	NSLDS National SMART Grant Change Flag	# N	Left
333		1974	1974	1	NSLDS Additional Pell Flag	Y or N	Left
334		1975	1975	1	NSLDS Additional Loans Flag	Y or N	Left
335		1976	1976	1	NSLDS Additional ACG Flag	Y or N	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
336		1977	1977	1	NSLDS Additional National SMART Grant Flag	Y or N	Left
337		1978	1978	1	NSLDS Direct Loan Master Prom Note Flag	A = Active C = Closed I = Inactive N = No Master Promissory Note on file Blank = No data from NSLDS	Left
338		1979	1979	1	NSLDS Direct Loan PLUS Master Prom Note Flag  This flag indicates the status of the Master Promissory Note for the parent of this student who has borrowed a PLUS loan on behalf of this student.	A = Active C = Closed I = Inactive N = No Master Promissory Note on file Blank = No data from NSLDS	Left
339		1980	1980	1	NSLDS Direct Loan Graduate PLUS Master Prom Note Flag  This flag indicates the status of the Master Promissory Note for the graduate student who has borrowed a PLUS loan.	A = Active C = Closed I = Inactive N = No Master Promissory Note on file Blank = No data from NSLDS	Left
340		1981	1981	1	NSLDS Subsidized Loan Limit Flag	C = Close to or equal to limit E = Exceeded limit N = No problem	Left
341		1982	1982	1	NSLDS Combined Loan Limit Flag	C = Close to or equal to limit E = Exceeded limit N = No problem	Left
342		1983	1984	2	NSLDS Pell Sequence Number (1)	01 to 03 Blank	Left
343		1985	1987	3	NSLDS Pell Verification Flag (1)	Alpha N/A	Left
344		1988	1993	6	NSLDS EFC (1)	000000 to 999999 Blank	Left
345		1994	2001	8	NSLDS Pell School Code (1)	Numeric Blank	Left
346		2002	2003	2	NSLDS Pell Transaction Number (1)	Numeric Blank	Left
347		2004	2011	8	NSLDS Pell Last Update Date (1)	Numeric (CCYYMMDD) N/A Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
348		2012	2017	6	NSLDS Pell Scheduled Amount (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
349		2018	2023	6	NSLDS Pell Amount Paid to Date (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
350		2024	2030	7	NSLDS Pell Percent Scheduled Award Used (1)  Percent with two decimal places assumed for example, 50% = 05000.	Numeric Blank	Right
351		2031	2036	6	NSLDS Pell Award Amount (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
352		2037	2040	4	Filler	For Federal Student Aid Use Only	Right
353		2041	2042	2	NSLDS Pell Sequence Number (2)	01 to 03 Blank	Left
354		2043	2045	3	NSLDS Pell Verification Flag (2)	Alpha N/A	Left
355		2046	2051	6	NSLDS EFC (2)	000000 to 999999 Blank	Left
356		2052	2059	8	NSLDS Pell School Code (2)	Numeric Blank	Left
357		2060	2061	2	NSLDS Pell Transaction Number (2)	Numeric Blank	Left
358		2062	2069	8	NSLDS Pell Last Update Date (2)	Numeric (CCYYMMDD) N/A Blank	Left
359		2070	2075	6	NSLDS Pell Scheduled Amount (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right
360		2076	2081	6	NSLDS Pell Amount Paid to Date (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right



Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
361		2082	2088	7	NSLDS Pell Percent Scheduled Award Used (2)  Percent with two decimal places assumed for example, 50% = 05000.	Numeric Blank	Right
362		2089	2094	6	NSLDS Pell Award Amount (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right
363		2095	2098	4	Filler	For Federal Student Aid Use Only	Right
364		2099	2100	2	NSLDS Pell Sequence Number (3)	01 to 03 Blank	Left
365		2101	2103	3	NSLDS Pell Verification Flag (3)	Alpha N/A	Left
366		2104	2109	6	NSLDS EFC (3)	000000 to 999999 Blank	Left
367		2110	2117	8	NSLDS Pell School Code (3)	Numeric Blank	Left
368		2118	2119	2	NSLDS Pell Transaction Number (3)	Numeric Blank	Left
369		2120	2127	8	NSLDS Pell Last Update Date (3)	Numeric (CCYYMMDD) N/A Blank	Left
370		2128	2133	6	NSLDS Pell Scheduled Amount (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
371		2134	2139	6	NSLDS Pell Amount Paid to Date (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
372		2140	2146	7	NSLDS Pell Percent Scheduled Award Used (3)  Percent with two decimal places assumed for example, 50% = 05000.	Numeric Blank	Right
373		2147	2152	6	NSLDS Pell Award Amount (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
374		2153	2156	4	Filler	For Federal Student Aid Use Only	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
375		2157	2158	2	NSLDS ACG Sequence Number (1)	01 to 03 Blank	Left
376		2159	2166	8	NSLDS ACG School Code (1)	Numeric Blank	Left
377		2167	2168	2	NSLDS ACG Transaction Number (1)	Numeric Blank	Left
378		2169	2176	8	NSLDS ACG Last Update Date (1)	Numeric (CCYYMMDD) N/A Blank	Left
379		2177	2182	6	NSLDS ACG Amount Paid to Date (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
380		2183	2188	6	NSLDS ACG Award Amount (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
381		2189	2189	1	NSLDS ACG School Year (1)	Numeric Blank	Right
382		2190	2191	2	NSLDS ACG Eligibility Code (1)	01 = High School Program 03 = AP/IB Courses 04 = Rigorous High School Programs	Left
383		2192	2197	6	NSLDS ACG High School Program Code (1)	Alpha/Numeric N/A Blank	Right
384		2198	2200	3	NSLDS ACG Sequence Code (1)	Numeric Blank	Right
385		2201	2202	2	NSLDS ACG Sequence Number (2)	01 to 03 Blank	Left
386		2203	2210	8	NSLDS ACG School Code (2)	Numeric Blank	Left
387		2211	2212	2	NSLDS ACG Transaction Number (2)	Numeric Blank	Left
388		2213	2220	8	NSLDS ACG Last Update Date (2)	Numeric (CCYYMMDD) N/A Blank	Left
389		2221	2226	6	NSLDS ACG Amount Paid to Date (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right
390		2227	2232	6	NSLDS ACG Award Amount (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right
391		2233	2233	1	NSLDS ACG School Year (2)	Numeric Blank	Right

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
392		2234	2235	2	NSLDS ACG Eligibility Code (2)	01 = High School Program 03 = AP/IB Courses 04 = Rigorous High School Programs	Left
393		2236	2241	6	NSLDS ACG High School Program Code (2)	Alpha/Numeric N/A Blank	Right
394		2242	2244	3	NSLDS ACG Sequence Code (2)	Numeric Blank	Right
395		2245	2246	2	NSLDS ACG Sequence Number (3)	01 to 03 Blank	Left
396		2247	2254	8	NSLDS ACG School Code (3)	Numeric Blank	Left
397		2255	2256	2	NSLDS ACG Transaction Number (3)	Numeric Blank	Left
398		2257	2264	8	NSLDS ACG Last Update Date (3)	Numeric (CCYYMMDD) N/A Blank	Left
399		2265	2270	6	NSLDS ACG Amount Paid to Date (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
400		2271	2276	6	NSLDS ACG Award Amount (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
401		2277	2277	1	NSLDS ACG School Year (3)	Numeric Blank	Right
402		2278	2279	2	NSLDS ACG Eligibility Code (3)	01 = High School Program 03 = AP/IB Courses 04 = Rigorous High School Programs	Left
403		2280	2285	6	NSLDS ACG High School Program Code (3)	Alpha/Numeric N/A Blank	Right
404		2286	2288	3	NSLDS ACG Sequence Code (3)	Numeric Blank	Right
405		2289	2290	2	NSLDS SMART Grant Sequence Number (1)	01 to 03 Blank	Left
406		2291	2298	8	NSLDS SMART Grant School Code (1)	Numeric Blank	Left
407		2299	2300	2	NSLDS SMART Grant Transaction Number (1)	Numeric Blank	Left
408		2301	2308	8	NSLDS SMART Grant Last Update Date (1)	Numeric (CCYYMMDD) N/A Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
409		2309	2314	6	NSLDS SMART Grant Amount Paid to Date (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
410		2315	2320	6	NSLDS SMART Grant Award Amount (1)  Whole dollar amount with leading zeros.	Numeric Blank	Right
411		2321	2321	1	NSLDS SMART Grant School Year (1)	Numeric Blank	Right
412		2322	2328	7	NSLDS SMART Grant Classification of Instructional Programs Code (1)	Numeric Blank	Right
413		2329	2331	3	NSLDS SMART Grant Sequence Code (1)	Numeric Blank	Right
414		2332	2333	2	NSLDS SMART Grant Sequence Number (2)	01 to 03 Blank	Left
415		2334	2341	8	NSLDS SMART Grant School Code (2)	Numeric Blank	Left
416		2342	2343	2	NSLDS SMART Grant Transaction Number (2)	Numeric Blank	Left
417		2344	2351	8	NSLDS SMART Grant Last Update Date (2)	Numeric (CCYYMMDD) N/A Blank	Left
418		2352	2357	6	NSLDS SMART Grant Amount Paid to Date (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right
419		2358	2363	6	NSLDS SMART Grant Award Amount (2)  Whole dollar amount with leading zeros.	Numeric Blank	Right
420		2364	2364	1	NSLDS SMART Grant School Year (2)	Numeric Blank	Right
421		2365	2371	7	NSLDS SMART Grant Classification of Instructional Programs Code (2)	Numeric Blank	Right
422		2372	2374	3	NSLDS SMART Grant Sequence Code (2)	Numeric Blank	Right
423		2375	2376	2	NSLDS SMART Grant Sequence Number (3)	01 to 03 Blank	Left
424		2377	2384	8	NSLDS SMART Grant School Code (3)	Numeric Blank	Left
425		2385	2386	2	NSLDS SMART Grant Transaction Number (3)	Numeric Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
426		2387	2394	8	NSLDS SMART Grant Last Update Date (3)	Numeric (CCYYMMDD) N/A Blank	Left
427		2395	2400	6	NSLDS SMART Grant Amount Paid to Date (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
428		2401	2406	6	NSLDS SMART Grant Award Amount (3)  Whole dollar amount with leading zeros.	Numeric Blank	Right
429		2407	2407	1	NSLDS SMART Grant School Year (3)	Numeric Blank	Right
430		2408	2414	7	NSLDS SMART Grant Classification of Instructional Programs Code (3)	Numeric Blank	Right
431		2415	2417	3	NSLDS SMART Grant Sequence Code (3)	Numeric Blank	Right
432		2418	2419	2	NSLDS Loan (1) Sequence Number	01 to 06 Blank	Left
433		2420	2420	1	NSLDS Loan (1) Type Code	D = Defaulted R = Recent T = Discharged F = Fraud Blank	Left
434		2421	2421	1	NSLDS Loan (1) Change Flag	# N Blank	Left
435		2422	2423	2	NSLDS Loan (1) Program Code	Alpha Code See NSLDS Loan Program Codes Table in the Processing Codes section of this technical reference.	Left
436		2424	2429	6	NSLDS Loan (1) Net Amount	000000 to 999999 Blank	Right
437		2430	2431	2	NSLDS Loan (1) Current Status Code	Alpha Code See NSLDS Loan Current Status Codes Table in the Processing Codes section of this technical reference.	Left
438		2432	2439	8	NSLDS Loan (1) Current Status Date	Format is CCYYMMDD Blank	Left
439		2440	2445	6	NSLDS Loan (1) Aggregate Principal Balance	000000 to 999999 N/A Blank	Left

<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
440		2446	2453	8	NSLDS Loan (1) Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
441		2454	2461	8	NSLDS Loan (1) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
442		2462	2469	8	NSLDS Loan (1) End Date	Numeric (CCYYMMDD) N/A Blank	Left
443		2470	2472	3	NSLDS Loan (1) Guaranty Agency Code	Numeric N/A Blank	Left
444		2473	2475	3	NSLDS Loan (1) Contact Type	Alpha N/A Blank	Left
445		2476	2483	8	NSLDS Loan (1) School Code	Numeric N/A Blank	Left
446		2484	2491	8	NSLDS Loan (1) Contact Code	Numeric N/A Blank	Left
447		2492	2494	3	NSLDS Loan (1) Grade Level	Alpha/Numeric N/A Blank	Left
448		2495	2495	1	NSLDS Loan (1) Additional Unsubsidized Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
449		2496	2496	1	NSLDS Loan (1) Capitalized Interest Flag	Y = Yes N = No	Left
450		2497	2502	6	NSLDS Loan (1) Disbursement Amount	000000 to 999999 N/A Blank	Right
451		2503	2510	8	NSLDS Loan (1) Disbursement Date	Numeric (CCYYMMDD) N/A Blank	Left
452		2511	2512	2	NSLDS Loan (2) Sequence Number	01 to 06 Blank	Left
453		2513	2513	1	NSLDS Loan (2) Type Code	D = Defaulted R = Recent T = Discharged F = Fraud Blank	Left
454		2514	2514	1	NSLDS Loan (2) Change Flag	# N Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
455		2515	2516	2	NSLDS Loan (2) Program Code	Alpha Code See NSLDS Loan Program Codes Table in the Processing Codes section of this technical reference.	Left
456		2517	2522	6	NSLDS Loan (2) Net Amount	000000 to 999999 Blank	Right
457		2523	2524	2	NSLDS Loan (2) Current Status Code	Alpha Code See NSLDS Loan Current Status Codes Table in the Processing Codes section of this technical reference.	Left
458		2525	2532	8	NSLDS Loan (2) Current Status Date	Format CCYYMMDD Blank	Left
459		2533	2538	6	NSLDS Loan (2) Aggregate Principal Balance	000000 to 999999 N/A Blank	Left
460		2539	2546	8	NSLDS Loan (2) Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
461		2547	2554	8	NSLDS Loan (2) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
462		2555	2562	8	NSLDS Loan (2) End Date	Numeric (CCYYMMDD) N/A Blank	Left
463		2563	2565	3	NSLDS Loan (2) Guaranty Agency Code	Numeric N/A Blank	Left
464		2566	2568	3	NSLDS Loan (2) Contact Type	Alpha N/A Blank	Left
465		2569	2576	8	NSLDS Loan (2) School Code	Numeric N/A Blank	Left
466		2577	2584	8	NSLDS Loan (2) Contact Code	Numeric N/A Blank	Left
467		2585	2587	3	NSLDS Loan (2) Grade Level	Alpha/Numeric N/A Blank	Left
468		2588	2588	1	NSLDS Loan (2) Additional Unsubsidized Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
469		2589	2589	1	NSLDS Loan (2) Capitalized Interest Flag	Y = Yes N = No	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
470		2590	2595	6	NSLDS Loan (2) Disbursement Amount	000000 to 999999 N/A Blank	Right
471		2596	2603	8	NSLDS Loan (2) Disbursement Date	Numeric (CCYYMMDD) N/A Blank	Left
472		2604	2605	2	NSLDS Loan (3) Sequence Number	01 to 06 Blank	Left
473		2606	2606	1	NSLDS Loan (3) Type Code	D = Defaulted R = Recent T = Discharged F = Fraud Blank	Left
474		2607	2607	1	NSLDS Loan (3) Change Flag	# N Blank	Left
475		2608	2609	2	NSLDS Loan (3) Program Code	Alpha Code See NSLDS Loan Program Codes Table in the Processing Codes section of this technical reference.	Left
476		2610	2615	6	NSLDS Loan (3) Net Amount	000000 to 999999 Blank	Right
477		2616	2617	2	NSLDS Loan (3) Current Status Code	Alpha Code See NSLDS Loan Current Status Codes Table in the Processing Codes section of this technical reference.	Left
478		2618	2625	8	NSLDS Loan (3) Current Status Date	Format is CCYYMMDD Blank	Left
479		2626	2631	6	NSLDS Loan (3) Aggregate Principal Balance	000000 to 999999 N/A Blank	Left
480		2632	2639	8	NSLDS Loan (3) Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
481		2640	2647	8	NSLDS Loan (3) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
482		2648	2655	8	NSLDS Loan (3) End Date	Numeric (CCYYMMDD) N/A Blank	Left
483		2656	2658	3	NSLDS Loan (3) Guaranty Agency Code	Numeric N/A Blank	Left
484		2659	2661	3	NSLDS Loan (3) Contact Type	Alpha N/A Blank	Left



Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
485		2662	2669	8	NSLDS Loan (3) School Code	Numeric N/A Blank	Left
486		2670	2677	8	NSLDS Loan (3) Contact Code	Numeric N/A Blank	Left
487		2678	2680	3	NSLDS Loan (3) Grade Level	Alpha/Numeric N/A Blank	Left
488		2681	2681	1	NSLDS Loan (3) Additional Unsubsidized Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
489		2682	2682	1	NSLDS Loan (3) Capitalized Interest Flag	Y = Yes N = No	Left
490		2683	2688	6	NSLDS Loan (3) Disbursement Amount	000000 to 999999 N/A Blank	Right
491		2689	2696	8	NSLDS Loan (3) Disbursement Date	Numeric (CCYYMMDD) N/A Blank	Left
492		2697	2698	2	NSLDS Loan (4) Sequence Number	01 to 06 Blank	Left
493		2699	2699	1	NSLDS Loan (4) Type Code	D = Defaulted R = Recent T = Discharged F = Fraud Blank	Left
494		2700	2700	1	NSLDS Loan (4) Change Flag	# N Blank	Left
495		2701	2702	2	NSLDS Loan (4) Program Code	Alpha Code See NSLDS Loan Program Codes Table in the Processing Codes section of this technical reference.	Left
496		2703	2708	6	NSLDS Loan (4) Net Amount	000000 to 999999 Blank	Right
497		2709	2710	2	NSLDS Loan (4) Current Status Code	Alpha Code See NSLDS Loan Current Status Codes Table in the Processing Codes section of this technical reference.	Left
498		2711	2718	8	NSLDS Loan (4) Current Status Date	Format is CCYYMMDD Blank	Left
499		2719	2724	6	NSLDS Loan (4) Aggregate Principal Balance	000000 to 999999 N/A Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
500		2725	2732	8	NSLDS Loan (4) Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
501		2733	2740	8	NSLDS Loan (4) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
502		2741	2748	8	NSLDS Loan (4) End Date	Numeric (CCYYMMDD) N/A Blank	Left
503		2749	2751	3	NSLDS Loan (4) Guaranty Agency Code	Numeric N/A Blank	Left
504		2752	2754	3	NSLDS Loan (4) Contact Type	Alpha N/A Blank	Left
505		2755	2762	8	NSLDS Loan (4) School Code	Numeric N/A Blank	Left
506		2763	2770	8	NSLDS Loan (4) Contact Code	Numeric N/A Blank	Left
507		2771	2773	3	NSLDS Loan (4) Grade Level	Alpha/Numeric N/A Blank	Left
508		2774	2774	1	NSLDS Loan (4) Additional Unsubsidized Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
509		2775	2775	1	NSLDS Loan (4) Capitalized Interest Flag	Y = Yes N = No	Left
510		2776	2781	6	NSLDS Loan (4) Disbursement Amount	000000 to 999999 N/A Blank	Right
511		2782	2789	8	NSLDS Loan (4) Disbursement Date	Numeric (CCYYMMDD) N/A Blank	Left
512		2790	2791	2	NSLDS Loan (5) Sequence Number	01 to 06 Blank	Left
513		2792	2792	1	NSLDS Loan (5) Type Code	D = Defaulted R = Recent T = Discharged F = Fraud Blank	Left
514		2793	2793	1	NSLDS Loan (5) Change Flag	# N Blank	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
515		2794	2795	2	NSLDS Loan (5) Program Code	Alpha Code See NSLDS Loan Program Codes Table in the Processing Codes section of this technical reference.	Left
516		2796	2801	6	NSLDS Loan (5) Net Amount	000000 to 999999 Blank	Right
517		2802	2803	2	NSLDS Loan (5) Current Status Code	Alpha Code See NSLDS Loan Current Status Codes Table in the Processing Codes section of this technical reference.	Left
518		2804	2811	8	NSLDS Loan (5) Current Status Date	Format is CCYYMMDD Blank	Left
519		2812	2817	6	NSLDS Loan (5) Aggregate Principal Balance	000000 to 999999 N/A Blank	Left
520		2818	2825	8	NSLDS Loan (5) Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
521		2826	2833	8	NSLDS Loan (5) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
522		2834	2841	8	NSLDS Loan (5) End Date	Numeric (CCYYMMDD) N/A Blank	Left
523		2842	2844	3	NSLDS Loan (5) Guaranty Agency Code	Numeric N/A Blank	Left
524		2845	2847	3	NSLDS Loan (5) Contact Type	Alpha N/A Blank	Left
525		2848	2855	8	NSLDS Loan (5) School Code	Numeric N/A Blank	Left
526		2856	2863	8	NSLDS Loan (5) Contact Code	Numeric N/A Blank	Left
527		2864	2866	3	NSLDS Loan (5) Grade Level	Alpha/Numeric N/A Blank	Left
528		2867	2867	1	NSLDS Loan (5) Additional Unsubsidized Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
529		2868	2868	1	NSLDS Loan (5) Capitalized Interest Flag	Y = Yes N = No	Left

Field #	FAFSA #	Start	End	Length	Field Name	Valid Content	Justify Signed
530		2869	2874	6	NSLDS Loan (5) Disbursement Amount	000000 to 999999 N/A Blank	Right
531		2875	2882	8	NSLDS Loan (5) Disbursement Date	Numeric (CCYYMMDD) N/A Blank	Left
532		2883	2884	2	NSLDS Loan (6) Sequence Number	01 to 06 Blank	Left
533		2885	2885	1	NSLDS Loan (6) Type Code	D = Defaulted R = Recent T = Discharged F = Fraud Blank	Left
534		2886	2886	1	NSLDS Loan (6) Change Flag	# N Blank	Left
535		2887	2888	2	NSLDS Loan (6) Program Code	Alpha Code See NSLDS Loan Program Codes Table in the Processing Codes section of this technical reference.	Left
536		2889	2894	6	NSLDS Loan (6) Net Amount	000000 to 999999 Blank	Right
537		2895	2896	2	NSLDS Loan (6) Current Status Code	Alpha Code See NSLDS Loan Current Status Codes Table in the Processing Codes section of this technical reference.	Left
538		2897	2904	8	NSLDS Loan (6) Current Status Date	Format is CCYYMMDD Blank	Left
539		2905	2910	6	NSLDS Loan (6) Aggregate Principal Balance	000000 to 999999 N/A Blank	Left
540		2911	2918	8	NSLDS Loan (6) Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
541		2919	2926	8	NSLDS Loan (6) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
542		2927	2934	8	NSLDS Loan (6) End Date	Numeric (CCYYMMDD) N/A Blank	Left
543		2935	2937	3	NSLDS Loan (6) Guaranty Agency Code	Numeric N/A Blank	Left
544		2938	2940	3	NSLDS Loan (6) Contact Type	Alpha N/A Blank	Left

<b>Field #</b>	<b>FAFSA #</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
545		2941	2948	8	NSLDS Loan (6) School Code	Numeric N/A Blank	Left
546		2949	2956	8	NSLDS Loan (6) Contact Code	Numeric N/A Blank	Left
547		2957	2959	3	NSLDS Loan (6) Grade Level	Alpha/Numeric N/A Blank	Left
548		2960	2960	1	NSLDS Loan (6) Additional Unsubsidized Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
549		2961	2961	1	NSLDS Loan (6) Capitalized Interest Flag	Y = Yes N = No	Left
550		2962	2967	6	NSLDS Loan (6) Disbursement Amount	000000 to 999999 N/A Blank	Right
551		2968	2975	8	NSLDS Loan (6) Disbursement Date	Numeric (CCYYMMDD) N/A Blank	Left
		<b>Total Bytes</b>	<b>2975</b>				