Connect For SUCCESS

**U.S. Department of Education
Delivery System Update
December 1998, Coronado, CA**

1999-2000 Delivery System Update

- **Changes to the Delivery System**
- **Redesign of the FAFSA**
- **Renewal FAFSA and Renewal Application Process**
- **Electronic Applications**
- **Changes to SAR and ISIR**

1999-2000 Delivery System
Dates

- **Feb** — **Began system development**
- **July** — **Draft ISIR Layout available on IFAP: http://ifap.ed.gov**
- **Sept** — **Action Letters on IFAP:**
  - » **Action Letter #1: Renewal Application Process**
  - » **Action Letter #2: New RFMS**

1999-2000 Delivery System
Dates

- **Nov** — **Action Letters on IFAP:**
  - » **Action Letter #3: Delivery System**
  - » **Action letter #4: TIV WAN Enrollment**
- **Nov** — **Revised ISIR Layout in 1999-2000 Technical Reference**
- **Nov** — **Federal School Code List mailed**
- **Dec** — **SAR/ISIR Guide posted on IFAP**
- **Jan** — **1999-2000 delivery system starts**

Delivery System Changes

- **Biggest changes were to FAFSA and**

- **Option to receive ISIRs on magnetic tape or cartridge discontinued**

- **System-generated transactions sent in separate message class**

- **Duplicate SSN and Return Mail Rosters**

- **In Spring 1999, ISIRs transmitted over Internet instead of TIV WAN**

New Automated Voice Response System for Students

- **PIC now offers Automated Voice Response System for students to:**

  - **Check status of their applications**

  - **Order duplicate SARs**

- **Call 1-800-4-FED-AID**

Changes to CPS Voice Processing System

- **Streamlined for easier access to most frequently used options**

- **Added option for FISAP for Windows**

- **Removed option to transfer to other Title IV contractors**

- **Added option to request EDExpress Packaging setup worksheets**

1999-2000 FAFSA

■ **Instructions for ordering FAFSAs - Announcement on IFAP (ANN-98-13)**

– **Schools can order FAFSAs over the web: http://epos.edpubs.org**

■ **Began distributing FAFSAs in early**

■

■

■

Delivery System Changes

- **Department of Veterans Affairs (VA) (implement at start-up)**
- **To confirm student's claim to be**

-

    Veteran Status Confirmed

    Not a Qualifying Veteran - assume not a

    – **Not Found on Database - assume not a Veteran**
    – **On Active Duty**

Delivery System Changes
SSA Matches

■ **Two new matches with SSA - both implemented after start-up**

■ **Expand current match to include Date of**

- **If match occurs, applicant record rejected**
- **Student must resolve all errors with SSA**

■ **New match with Prisoner's File maintained**

- **Record not rejected; "C" Code and comment**

Delivery System Changes
Edits

- **Reject Codes 2 and 3 combined into single Reject Code 2 (not enough income**

- **Renewal applicants no longer subjected to Reject Code N when first or last name**

1999-2000 FAFSA

- **Major redesign of form**

- **ED worked in cooperation with applicants and financial aid community to develop kinder, simpler form**

- **Redesigned FAFSA approved by OMB on**

FAFSA

Free Application for Federal Student Aid

OMB 1840-0110   July 1, 1999 — June 30, 2000 school year

Use this form to apply for federal student grants, work-study money, and loans.

You can also apply over the **internet** at: http://www.fafsa.ed.gov instead of using this paper form. In addition to federal student aid, you may also be eligible for a **Hope** or a **Lifetime Learning** income tax credit, both of which you claim when you file your taxes. For more information on these tax credits, this application, and the U.S. Department of Education's student aid programs, call 1-800-4FED-AID (1-800-433-3243) Monday through Friday between 8:00am and 8:00pm eastern time or look on the internet at http://www.ed.gov/offices/OPE. If you are hearing impaired, call TDD 1-800-730-8913.

Your answers on this form will be read by a machine. Therefore,

- use black ink or #2 pencil and fill in ovals completely, like this:
- print clearly in CAPITAL letters and skip a box between words:
- report dollar amounts (such as $12,356.00) like this:
- write numbers less than 10 with a zero (0) first:

Yellow is for students and **purple is for parents.**

- If you are filing a **1998 income tax return**, we recommend that you fill it out before completing this form. However, you do not need to send your income tax return to the IRS before you fill out this form.
- After you complete this application, make a copy of it. Then **send the original of pages 3 through 6** in the attached envelope or send it to Federal Student Aid Programs, P.O. Box 4008, Mt. Vernon, IL 62864-8608.
- Send in this application—pages 3 through 6— only between **January 1, 1999, and June 30, 2000.**
- You should hear from us within four weeks. If you do not, please call 1-319-337-5665.
- If you or your family has **unusual circumstances** (such as loss of employment or major medical expenses) that might affect your need for student financial aid, check with the financial aid office at the college you plan to attend.
- With this form you may also be able to apply for student **aid from other sources, such as your state or college.** The deadlines for states (see below) or colleges may be as early as January 1999, and you may be required to complete additional forms.

Now go to page 3 and begin filling out this form. Refer to the notes as needed.

Deadline dates for state aid. Generally, state aid comes from your state of legal residence. **Check with your high school guidance counselor** or the financial aid administrator at your college about state and college sources of student financial aid. State deadlines are below.

AZ June 30, 2000 (date received)	MO March 1, 1999 (date postmarked)	ND April 15, 1999 (date processed)
CA March 2, 1999 (date postmarked)	MA For priority consideration - May 1, 1999	OH October 1, 1999 (date received)

Redesigned for 1999-2000

- **Reduced from 16 to 8 pages**

- **Reorganized into Steps One through Six**

- **Order of questions revised; more closely matches FAFSA on the Web**

- **2 colors: yellow for students and purple for**

- **Eliminated SNT decision trees (formerly Worksheets A & B)**

- **State deadlines moved to front page**

- **ED's Toll-Free number moved to front page**

1999-2000 FAFSA
Data Element Changes

- **Total number of questions reduced from**

- **Unearned income items moved to Worksheet A**

- **Earned Income Credit (EIC) is a separate**

- **Hope Scholarship and Lifetime Learning Tax Credit information collected on**

1999-2000 FAFSA
Data Element Changes, cont'd

- **Assets reported as "net worth"**

- **"Title IV School Code" renamed "Federal**

- **Spouse's signature no longer collected on**

- **Only one space for parent signature provided on FAFSA**

1999-2000 Renewal FAFSA

- **Relatively few changes made to format**

- **Questions reworded and reordered to correspond to FAFSA changes**

- **Instructions reduced from 24 to 12**

- **Renewal FAFSA and Instructions on**

1999-2000 Renewal Application Process

- **Action Letter #1, GEN-98-19, posted on IFAP in September 1998**

- **Important dates:**
  - **Oct 5 - Nov 6: Schools request Renewal**

  - **Nov 12 - 20 - CPS printed and bulk-mailed Renewal FAFSAs**

1999-2000 Renewal Application Process

- **Important Dates, cont'd:**
  - **Nov 23 - Jan 8 - CPS prints and mails Renewal FAFSAs not requested by**

  - **Nov 28 - Students begin requesting**

- **Second mailing of Renewal FAFSAs**

Application Volume

■ **Volume:**

   – **1997-98 FAFSAs: 8,897,852 as of**

   – **1998-99 FAFSAs: 8,921,495 as of**

■ **0.2 % increase in volume from 1997-98 to 1998-99**
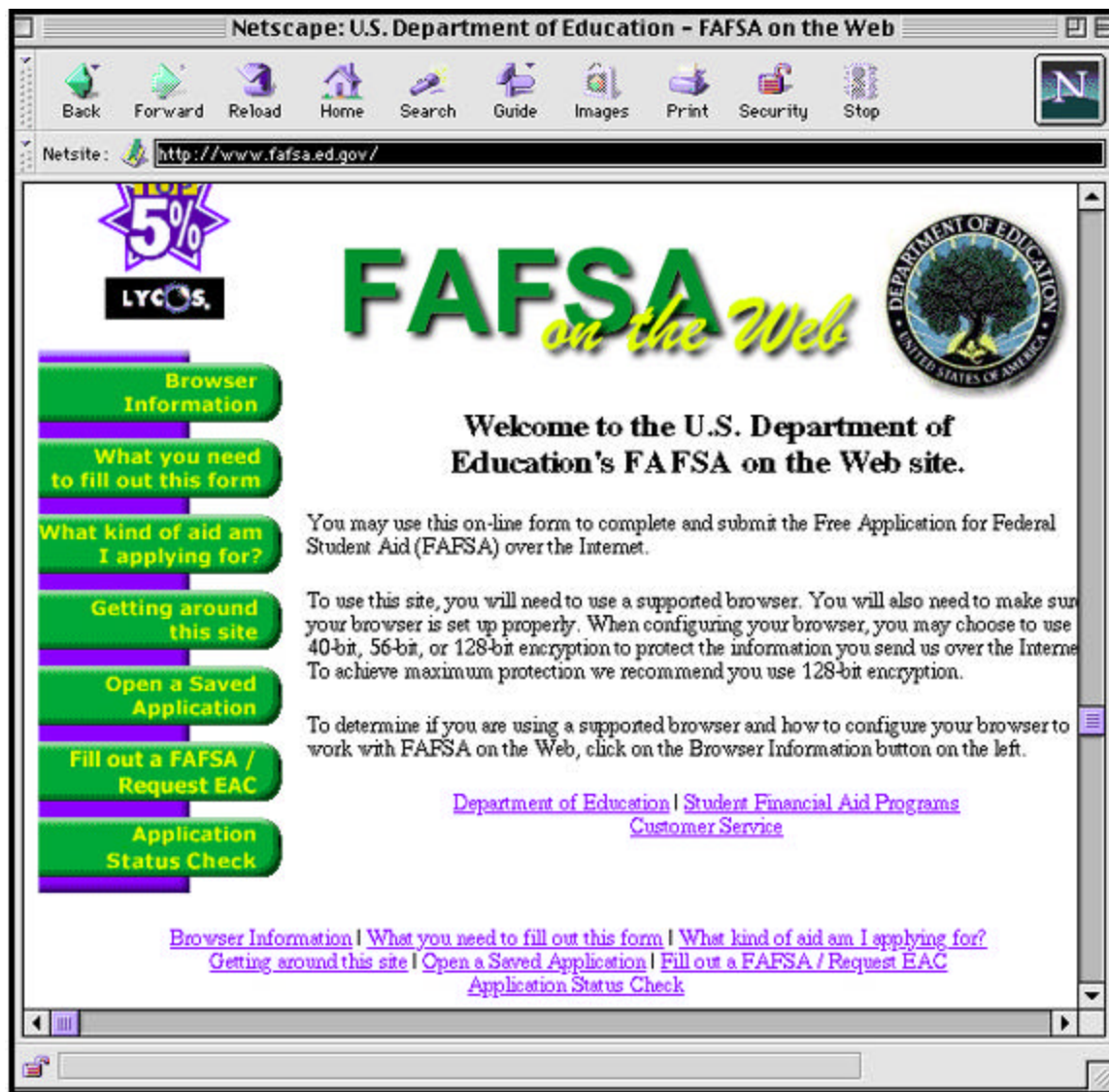
FAFSA on the Web and Renewal FAFSA on the Web

- **Available to students on Jan. 4, 1999**

- **Expanded browser options: 40-, 56-, and 128-bit encryption**

- **Questions changed to match FAFSA**

- **Added assumption and reject overrides**

- **New on-line application status checking**

- **New EFC Estimator (coming soon!)**

- **New Banner Ad (coming soon!)**

FAFSA on the WEB

FAFSA on the Web

- **Interview format retained**

- **Signature process the same**

- **To promote FAFSA on the Web, ED will distribute brochures to high schools, postsecondary schools, state agencies, libraries, PTAs, and**

FAFSA on the Web
Advantages

- **No software to install**

- **Can be used on PC or Macintosh platform**

- **Contains skip logic**

- **Built-in edits reduce reject rate (<0.5%)**

- **Data is entered by student**

- **Faster processing time**

Renewal FAFSA on the Web

- **More than 70,000 processed for 1998-99 (through December 6)**

- **Students will receive instruction booklet with Renewal FAFSA encouraging use of Renewal**

- **Students will need an EAC to access Renewal**

- **EACs will be same as last year**

- **Students began requesting EACs**

- **Student must reside at address in CPS**

Electronic Access Codes
Changes

- **EACs automatically sent to students who filed:**
  - **1998-99 FAFSA on the Web or Renewal FAFSA**

  - **1998-99 paper or electronic FAFSA and:**
    - **5th year U/G or Grad AND**
    - **expected to complete program after 7/99**
- **Will not receive paper Renewal Application**
- **Mailing of EACs began on 11/30**
- **EACs mailed during bulk-mailing period will be**

Renewal FAFSA on the Web - *Using the EAC*

- **EAC serves as student's signature**

- **Dependent students will have to print and mail signature page with parent signature**

- **Students will be able to use EAC to gain access to other financial aid systems (upcoming pilot with Direct Loan Servicer**

Renewal FAFSA on the Web - Advantages

■ **Advantages similar to FAFSA on the**

    – **Very fast processing for independent students because EAC serves as**

    – **Very little data for students to enter**

FAFSA Express

- **Includes same assumptions and reject overrides added to web products**

- **Available for students to download from the Web by time system starts**

  www.ed.gov/offices/OPE/express.html

EDExpress
Changes for 1999-2000

- **Early Analysis is a correctable field**

- **Includes same new assumptions and reject overrides added to web products and FAFSA Express**

- **32-bit conversion; need to use Windows 95, 98, or NT**

- **Student entry option will not be available in 1999-2000 software**

SAR and ISIR
Changes

- **SAR is yellow**

- **Instructions and Codes page simplified**

- **Order and numbering of questions revised to correspond to FAFSA changes**

- **Data Release Number (DRN) printed on front of every page of SAR**

- **Draft 1999-2000 SAR, SAR Acknowledgement, and SAR Instructions**

SAR and ISIR
Changes to NSLDS History Page

- **Aggregate Amount for FFELP/Direct**

  - Section reorganized
  - "Unsubsidized Loans" field renamed

- **Pell Grant Data Section:**
  - Added space for third record of payment

  - Added EFC and Verification Tracking Flag

Changes to NSLDS History Page, Cont'd

- **Loan Detail Section:**
  - Added new grade level field
- **Two new SAR/ISIR comments for FFEL**

  - Student is within one annual loan limit of aggregate loan maximum
  - Student appears to have borrowed in excess of aggregate loan limit
    - SAR/ISIR will have SAR "C" Code

For Help

- **CPS Customer Support: 1-800-330-5947**

- **CPS@NCS.COM**

- **FAFSA Express and FAFSA on the Web Customer Service: 1-800-801-0576**

Give Us Your Comments or Questions

- **Application and Pell Processing Systems Division:**
  - Phone: (202) 260-9988
  - FAX: (202) 401-1637