Summary of Changes for the Application Processing System

2012–2013

U.S. Department of Education

FEDERAL STUDENT AID

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Introduction

Overview

The *Summary of Changes for the Application Processing System* is designed to meet the reference needs of financial aid administrators (FAAs), programmers, and data processing staff. In this guide, we describe updates and enhancements to the 2012-2013 application processing system and to student and school Web products. We recommend you review the information provided in this guide, as some enhancements may require you to modify your office procedures and system operations.

The following sections are included in this guide:

- **Major Changes** – This section provides information about major changes for the 2012-2013 processing year and covers the following topics:

    - Internal Revenue Service (IRS) Data Retrieval Tool Enhancements

    - IRS Data Retrieval Notifications

    - Enable FAAs to Override Rejects for Changes to Student Marital Status Date

    - Enhanced Reporting for Applicants Not Required to Provide Asset Information

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    - Pacific Islander Social Security Number Changes

    - Disabling of the Verification Tool for 2012-2013 cycle

- **2012-2013 Application Processing System Schedule** – This section provides important processing deadlines and anticipated document and software release dates.

- **Summary of Changes to the 2012-2013 Paper Free Application for Federal Student Aid (FAFSA) and FAFSA on the Web Site** – This section provides descriptions of the FAFSA and FAFSA on the Web Worksheet, including information about requesting and receiving paper forms and downloading electronic forms. Changes to the 2012-2013 paper FAFSA and the FAFSA on the Web site are also described.

- **Summary of Changes to FAA Access to CPS Online** – This section provides information about the FAA Access to CPS Online (FAA Access) enrollment requirement and information about changes to Application Processing (Student Inquiry, Application/Verification Tool Entry, and Institutional Student Information Record [ISIR] Request options), Return of Title IV Funds (R2T4) on the Web, and the ISIR Analysis Tool.

- **Summary of Changes to the 2012-2013 Central Processing System (CPS)** – This section provides information about changes to the CPS. The following areas are discussed:
  - Database Matches
  - CPS Edits
  - Need Analysis
  - Application Output Sent to Students
  - Other Noteworthy Information

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

- **Appendix: Outline of Major Changes** – This section provides a list of major changes for the 2012-2013 application processing system. You can copy and paste this list into a word processing document and customize the text as needed to prepare your staff for the upcoming award year.

Major Changes

Description of Major Changes

In this section, we describe major changes to the application processing system and Web products for 2012-2013, including updates and enhancements resulting from annual and legislative changes. Policy and operational guidance can also be found on the Information for Financial Aid Professionals (IFAP) Web site at ifap.ed.gov.

Internal Revenue Service (IRS) Data Retrieval Tool Enhancements

We continue to enhance the IRS Data Retrieval Tool to improve the accuracy of financial information collected from applicants. For 2012-2013, the IRS Data Retrieval process will be implemented on February 1, 2012.

In the list below, we briefly describe 2012-2013 FAFSA on the Web enhancements for the IRS Data Retrieval Tool. The sections following the list provide detailed descriptions.

- **Filtering Question** – A filtering question asks the applicant (and the applicant's parents, when applicable) when and how he or she filed a tax return to determine if he or she should transfer tax information from the IRS into the FAFSA.

- **Dynamically Displayed Messaging** – Based on the applicant's response to the filtering question, new messages recommend or prohibit the use of the IRS Data Retrieval Tool. Messages to recommend the use of the IRS Data Retrieval Tool include a link to the IRS Web site.

- **Enhanced IRS Data Tracking** – To identify applicants and parents who appear to be eligible to transfer tax information from the IRS, but have not, we have enhanced tracking of applicant and parent eligibility to use the IRS Data Retrieval Tool and their responses when they are presented with an option to link to the IRS Web site.

- **Notifications to Applicants** – To encourage use of the IRS Data Retrieval Tool by students and parents who appear to be eligible to use the Tool, but have not, we updated existing communications and created new e-mail notifications to remind applicants and parents about the Tool and to encourage them to use the IRS Dat**a** Retrieval Tool in Student Correction Entry to ensure that accurate information is provided on the FAFSA.

The IRS Data Retrieval enhancements are described in more detail in the following sections.

Filtering Question

Applicants who are eligible to use the IRS Data Retrieval process are linked to an IRS Web site from Student Application Entry and Student Correction Entry in FAFSA on the Web. Dependent and independent applicants (and the applicants' parents, when applicable) who meet all of the following criteria may be eligible to use the 2012-2013 IRS Data Retrieval process:

- Must have a valid SSN,

- Must have filed a 2011 federal tax return, and

- Must have an unchanged marital status since December 31, 2011.

Before linking an applicant to the IRS Data Retrieval Tool in 2012-2013, we present a new filtering question related to the applicant's eligibility to transfer IRS tax information. The filtering question is displayed before the Student Finances questions, and, when applicable, before the Parent Finances questions.

The filtering question assists with identifying an applicant whose circumstances suggest that IRS tax information is unlikely to be available or does not reflect the applicant's current financial status. Based on the applicant's response to the filtering question, new messages recommend or prohibit the use of the IRS Data Retrieval Tool. These messages are described in the next section.

The new filtering question is displayed with an IRS icon and instructional text to inform the applicant that he or she may be able to use the IRS data retrieval process to view and transfer tax information from the IRS. The message on the Parents Finances page addresses both parents, the father, or the mother, depending on the applicant's response to the parents' marital status question and whose information the applicant provided on the Parents Demographic page.

The student and parents, when applicable, are required to respond to the following filtering question.

> Check all that apply or check **None of the Above**.
>
> ☐ My tax filing status is Married Filing Separately
> ☐ My tax filing status is Head of Household
> ☐ I filed an amended tax return
> ☐ I filed a Puerto Rican or foreign tax return
> ☐ I recently filed my taxes
> ☐ None of the above

Note: The "My tax filing status is Married Filing Separately" option and "My tax filing status is Head of Household" option are displayed only when the student or parents, when applicable, are married.

Based on the applicant's response, we display a message to recommend or prohibit the use of the IRS Data Retrieval Tool. The next section describes the messages and the circumstances that cause a message to be displayed.

Dynamically Displayed Messaging

Based on the response to the student's or parents' filtering question, the student or parents are placed into one of the following categories:

- **Recently filed, data may not be available to transfer** – If the applicant recently filed his or her taxes, we inform the applicant that tax information electronically filed (within the last 2 weeks) or submitted by mail (within the last 8 weeks) may not be available.

  We ask the applicant to keep in mind any deadlines, and provide a link that opens the 2012-2013 FAFSA Deadlines PDF in a new browser window so the applicant can check state deadlines. In addition, we provide a "View option to link to the IRS" link. The applicant or parent can use this option to access the IRS Web site to see if tax information from the IRS is available.

- **Eligible to transfer data** – If an applicant selects "None of the above," we recommend that he or she transfer information from the IRS into the FAFSA and display the following features:

  – Text field to enter a Federal Student Aid PIN

    - When a married parent needs to provide his or her Federal Student Aid PIN, we ask which parent is linking to the IRS Web site to determine which parent's Federal Student Aid PIN is required.

    - When a student is completing an initial FAFSA, we ask the applicant to enter their Federal Student Aid PIN before linking to the IRS Web site. When a student is completing a FAFSA Renewal or a FAFSA Correction, the student has already entered his or her Federal Student Aid PIN and, therefore, is not asked to provide a Federal Student Aid PIN again.

  – Link to Federal Student Aid PIN options

    - "Apply For A PIN," for applicants who don't have a Federal Student Aid PIN; or

    - "I Forgot/Don't Know My PIN," for applicants who have a Federal Student Aid PIN

  – Link to IRS button

- **Not eligible to transfer data** – If an applicant selects one or more of the first four options in the filtering question, we bypass the option to link to the IRS Web site and inform the applicant, based on his or her response, that he or she is not eligible to transfer tax information from the IRS into the FAFSA. In these cases, the applicant's circumstances suggest the IRS tax information is unlikely to reflect his or her current financial status.

- **Already transferred data** – If the IRS tax information has already been transferred, we inform the applicant or parent that he or she has already transferred tax information from the IRS and we include a "View option to link to the IRS" link.

- **IRS Web site is not accessible** – If we are unable to access the IRS Web site, we inform the applicant the IRS Web site is temporarily unavailable due to scheduled maintenance or technical difficulties.

Enhanced IRS Data Tracking

By encouraging applicants and their parents to transfer tax information from the IRS Web site into the FAFSA, we ensure that accurate information is provided on the FAFSA. For 2012-2013, enhanced tracking enables us to identify applicants or parents who did not transfer tax information from the IRS Web site, even though we determined that they were eligible for—and we presented them with the option to use—the IRS Data Retrieval Tool. These applicants and parents receive notifications, described in the next section, to encourage the use of the IRS Data Retrieval Tool in Student Correction Entry.

We use a number of CPS data fields to track when an applicant or parent is eligible to link to the IRS Web site, how he or she responds when presented with the option to use the IRS Data Retrieval Tool, and what changes he or she makes, if any, to tax information after it is transferred from the IRS Web site. While some of these tracking methods are used internally by the CPS and are omitted from electronic and paper output, the IRS Request Flag is designed to describe the display and use of the IRS Data Retrieval Tool and is printed on the SAR and ISIR. It can also be found in Student Inquiry in FAA Access. To describe the status of data transferred from the IRS Web site more clearly, we reworded our descriptions for the IRS Request Flag values and added two new values. The two new values are 05 and 06. The new descriptions are as follows:

Blank = IRS Data Retrieval Tool not available in the application method utilized by the student/parent (i.e., a paper FAFSA, EDE, or FAA Access)

00 = Student/Parent was ineligible to use the IRS Data Retrieval Tool and was therefore not presented with the option to use it in FAFSA on the Web

01 = Student/Parent was presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web and elected to use it, but did not transfer IRS data into the FAFSA

02 = IRS data for the student/parent was transferred from the IRS and was not changed by the user prior to submission of an application or correction

03 = IRS data for the student/parent was transferred from the IRS and changed by the user prior to submission of an application or correction

04 = IRS data for the student/parent was transferred from the IRS and then changed by the user on a subsequent transaction

05 = Student/Parent was presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web, but did not elect to use it

06 = IRS data for the student/parent was transferred from the IRS, but a subsequent change made the student/parent ineligible to use the IRS Data Retrieval Tool

IRS Data Retrieval Notifications

In our effort to encourage applicants to use the IRS Data Retrieval Tool, we revised existing notifications and added new IRS Data Retrieval notifications.

Existing Notifications

We modified the following communications to applicants:

- **Student Processed SAR E-mail** – We added new text to the comment in the Student Processed SAR e-mail notification to tax estimators to encourage use of the IRS Data Retrieval Tool once they have filed their returns.

- **SAR Comment Text** – Comments 156, 157, 273, and 274 are included on the SAR, eSAR, and the Comments page in Student Inquiry for tax estimators. The comments now encourage an applicant who has made changes to his or her estimated tax information (157 and 274) or his or her parents' estimated tax information (156 and 273) to use the online IRS Data Retrieval Tool to transfer tax information.

- **Confirmation Page** – We added messages regarding the IRS Data Retrieval process to the Confirmation page in Student Application Entry and Student Correction Entry when:

  – Student or parent was eligible to use the IRS Data Retrieval Tool and did not transfer IRS tax information; or

  – Student or parent was not eligible to use the IRS Data Retrieval Tool due only to his or her status as a tax estimator.

New Notifications

We will begin sending new IRS Data Retrieval e-mail notifications to encourage certain applicants and their parents to use the IRS Data Retrieval Tool. There are two types of notifications:

- **Tax Estimators** – We will send e-mail notifications to students and parents who submitted a FAFSA before filing taxes and have not updated their filing status. The CPS database will be queried in mid-March, 2012 and we will send the first round of e-mail to tax estimators. The CPS database will be queried a final time in early-May 2012 for the second round of e-mail notifications.

- **Tax Filers** – From early April, 2012 through the end of the processing year, we will also periodically send one-time e-mail notifications to students and parents who submitted a FAFSA that indicated a tax filing status of "already filed" and who did not transfer tax information from the IRS.

Notifications will be sent to independent students, dependent students, and dependent student's parents who qualify based on their tax filing status. Spanish notifications will be sent to students and parents who completed a Spanish application or correction.

Enable FAAs to Override Rejects for Changes to Student Marital Status Date

The FAFSA is intended to be a snapshot of the applicant's situation "as of the date" he or she completed the application. Currently, an applicant cannot change his or her answers to the marital status and marital status date unless the information originally submitted was incorrect as of the date the application was submitted.

New for 2012-2013: On October 29, 2010, the U.S. Department of Education published in the Federal Register final regulations on program integrity issues (75 FR 66832). These final regulations made a number of changes to the regulations governing the programs authorized by the Higher Education Act of 1965, as amended (HEA). The regulations were generally effective July 1, 2011, except for revisions to Subpart E of part 668 of the Student Assistance General Provision regulations, Verification and Updating of Student Aid Application Information, which are effective July 1, 2012.

As a result of the regulations effective July 1, 2012, FAAs have the discretion to ask an applicant to update marital status information for changes that occur after the initial application was submitted. If the FAA determines the update is necessary to address an inequity or to more accurately reflect the applicant's ability to pay, the FAA can override the resulting marital status reject edit.

To support this new regulation, we added a reject (Reject 21) and a corresponding reject override code (Reject Override 21). When an applicant changes his or her marital status date to a date that falls between the original FAFSA submission date and the correction submission date, the applicant's correction record is rejected and includes Reject 21 and comment 119 is set. The comment text informs the applicant that the marital status and date should only be changed if they were reported incorrectly on the date the FAFSA was originally submitted, or if an FAA has instructed him or her to update the information. In addition, it instructs the applicant to make the necessary correction or contact his or her FAA for assistance.

To authorize changes based on this provision, the FAA can override the student's rejected correction transaction by reentering the new marital status and marital status date in FAA Access or in the FAA Access interface in EDExpress or by using the Reject 21 override in an Electronic Data Exchange (EDE) correction record (CORR13IN). If the FAA wants to use other new information on the rejected transaction without authorizing a marital status change, the FAA can submit the correction by entering the marital status and marital status date from the original FAFSA submission instead of reentering the new marital status and marital status date.

To authorize changes based on this provision before the student has submitted a correction, the FAA can create a correction to update the marital status and marital status date using FAA Access or the FAA Access interface in EDExpress, or by setting the Reject 21 override code in an EDE correction record (CORR13IN).

Enhanced Reporting for Applicants Not Required to Provide Asset Information

In 2011-2012 FAFSA on the Web, we added new logic allowing some applicants to skip asset-related questions if the applicant's eligibility is not affected by providing asset information (and their state grant agency does not require it). This logic is enabled by asking applicants an asset threshold filtering question. When an applicant submits his or her FAFSA with blank responses to the asset questions because of answering "No" to the asset threshold filtering question, the CPS accepts the omission of the asset data and suppresses Reject 1, which is otherwise applied to the transaction.

After implementing this change for 2011-2012, we became aware of issues vendors encountered due to the lack of information on the ISIR to indicate the applicant was presented with and answered the asset threshold filtering question. On the vendor's system, it appeared that the applicant had a Reject 1 (missing asset information).

As a temporary fix, we added two new comment codes, 901 and 902, which identified whether the applicant or parent was presented with and answered "No" to the asset threshold filtering question on FAFSA on the Web.

As our permanent solution, we are adding two new fields on the ISIR for 2012-2013: Student's Asset Threshold Exceeded and Parents' Asset Threshold Exceeded. Valid values for the ISIR fields include:

> **1** = Asset threshold was exceeded; must provide additional asset information
>
> **2** = Asset threshold was not exceeded; no additional asset information is needed
>
> **Blank** = Applicant filed on the Web and the asset threshold filtering question was not presented or the applicant filed using a paper FAFSA or an FAA used EDE

While these fields are included in the ISIR file and printed on the ISIR, they are not printed on the SAR or SAR Acknowledgement. The fields are displayed in Student Inquiry in FAA Access on the Student Income/Assets page and Parent Information page. Because of this solution, comments 901 and 902 have been eliminated.

Homeless Youth Determination Reporting Changes

FAAs continue to be required to determine whether a student is an unaccompanied youth who is homeless or is self-supporting and at risk of being homeless if the student:

- Is 21 or younger and

- Cannot answer "Yes" to any of the homeless youth questions (55-57).

Currently, there is no operational distinction between a dependency override request that was submitted to make a dependent applicant independent and one that was submitted as a way of reporting an FAA homeless youth determination that was not, in fact, a dependency override.

Students who are older than 21, but not yet 24, and who are unaccompanied and homeless or self-supporting and at risk of being homeless, qualify for a dependency override.

New for 2012-2013: We are adding a new value for a homeless youth determination. A value of "4" in the Dependency Override field indicates the FAA has determined the applicant to be an unaccompanied youth who is homeless or self-supporting and at risk of becoming homeless and, therefore, wants the CPS to treat the applicant as an independent student. Students who are 22 or 23 years of age and determined to be unaccompanied and homeless or self-supporting and at risk of being homeless should have a value of "1" as an FAA dependency override.

For more detailed information on homeless youth determinations and dependency overrides, please consult the [Application and Verification Guide](#) on the IFAP Web site.

How do I report a homeless youth determination?

To make a homeless youth determination on an applicant record, the FAA can use:

- **FAA Access to CPS Online** –To report a homeless youth determination using FAA Access to CPS Online, select "4 – FAA homeless youth determination" in the Dependency Override field in FAA Application Entry or FAA Correction Entry.

- **The Paper FAFSA** – Using the paper FAFSA, the FAA can report a homeless youth determination by selecting the new Homeless Youth Determination circle under the "College Use Only" section to the right of the Dependency Override field on page 8. The FAA must also include his or her Federal School Code and sign the application.

- **Electronic Data Exchange –** An FAA can report a homeless youth determination by submitting an electronic application record (EAPS13IN) or correction record (CORR13IN) with a Dependency Override field value of "4" for Homeless Youth Determination.

After the Dependency Override transaction is processed, the resulting SAR or eSAR has a Dependency Override value that equals "4" and an EFC is calculated. Comment code 163 is added to confirm the FAA determination of the applicant's homeless youth status.

For students who are 22 or 23 years of age and determined to be unaccompanied and homeless, or self-supporting and at risk of being homeless, FAA's should report a value of "1" in the FAA dependency override field.

How can I override a homeless youth determination?

If you determine a processed Dependency Override based on a homeless youth determination was requested in error, you can override that determination by submitting a correction using FAA Access or Electronic Data Exchange. The FAA can change the Dependency Override value to "2 – FAA override canceled."

Gender Question Changes

In an effort to encourage more applicants to answer the "Are you male or female" question, we added informational text to FAFSA on the Web. The answer to this question is important because female applicants are not sent to the Selective Service match. Female applicants sent to Selective Service come back as not matched, which then requires the FAA to follow up.

When an applicant attempts to navigate away from the page without answering the question, the Alerts and Messages text at the top of the page informs the applicant he or she left the question blank. In addition, we advise the applicant that the information is important and should be provided, as most males must be registered with the Selective Service to qualify for federal student aid.

Enhanced High School and Federal School Code Search Features

We enhanced the high school and Federal School Code search tool for the 2011-2012 and 2012-2013 processing years. Changes to the search tool, which is available from Student Application Entry, Student Correction Entry, FAA Access, and the FAFSA on the Web home page (Federal School Code search only), include:

- Modified keyword search rules
- "Best Match" results
- Redesigned search results (2012-2013 FAFSA on the Web Federal School Code search only)

Modified Keyword Search Rules

The search tool uses the following criteria from the applicant to execute a keyword search:

- State (required)
- City (optional)
- Name (High School or Postsecondary School) (optional)
- School Year (requested and required only in the Federal School Code search tool found on the home page; Student Application Entry, Student Correction Entry, and FAA Access searches are based on the school year of the FAFSA or FAFSA Correction)
- Federal School Code (optional for Federal School Code searches; not requested for High School searches)

To provide applicants with more accurate and relevant search results, we implemented new rules for keyword searches, including:

- **Field Length Increased** – The name field for the Federal School Code search can receive and display 40 characters, enabling the applicant to provide a more complete school name.

- **Aliases, Abbreviations, and Misspelled Words/Cities** – The search is able to match commonly used abbreviations and aliases, as well as common misspellings of words and cities, for example:

  - **Abbreviations and Aliases** – "In," "Inst," or "Institut" for Institution; "SR" for Senior; "Tech" or "Polytech" for Polytechnical; "CALTECH" for California Institute of Technology; or "CUW" for Concordia University - Wisconsin

  - **Misspelling** – "Albanee," "Albny," or "Allbany" for Albany; "Misoula," "Missola," or "Missula" for Missoula; or "Talint" or "Telant" for Talent

- **Words and Punctuation Ignored** – The search ignores certain words ("of," "and," and "the") and punctuation marks (period [.], dash [-], pound sign [#], at sign [@], percent [%], slash [/], comma [,], colon [:], equal sign [=], quotation ["], ampersand [&], parenthesis [()], and apostrophe [']).

- **Special Characters** – The Federal School Code search accepts certain characters in the school name and city fields to improve matches to foreign schools, for example, the tilde (ã), the grave (è), and the circumflex (û).

- **New Search Logic** – We enhanced the search logic to provide more comprehensive results.

"Best Match" Results

A search using the new keyword search logic is likely to yield numerous matches. Nevertheless, applicants will find it easier to locate the school they are seeking because the tool displays the results in order of relevance. The search results that most closely match the search criteria are displayed at the top of the search results. In addition, applicants have the option to change the "Best Match" results to "School Name" results, which re-sorts the same list alphabetically (A-Z) by school.

In FAA Access, the High School Search options are Best Match, Name, or City. The Federal School Code search options in FAA Access are Best Match, Name, Address, or Federal School Code.

Note: We enhanced the keyword search rules and added "best match" results to the 2011-2012 and 2012-2013 cycles; however, help text and page text updates reflecting the changes were only made to the 2012-2013 cycle.

Redesigned Search Results

For 2012-2013, we redesigned the School Selection page in the Federal School Code search from the FAFSA on the Web Home page, Student Application Entry, and Student Correction Entry. Features of the redesign are described below.

The Alerts and Messages text at the top of the page briefly describes the status of the applicant's search and provides applicable instructions. For successful searches, the search tool displays the search results and the applicant's list of selected schools in side-by-side tables below the search criteria. We added the name of the state where the school is located to the search results. This is the state provided in the keyword search, unless the search criterion was a federal school code.

In addition, we added the name of the city and state where the school is located to the list of selected schools.

By first selecting one or more schools from the search results and then selecting the "ADD" button between the tables, the applicant can add the schools to his or her selected school listing. Similarly, the applicant can remove a school from his or her list of selected schools by selecting a "Remove" link found next to each school in the list of selected schools.

Both the search results table and the selected schools table are displayed in scrollable boxes. The search results display as many as 100 schools per page. If the search returns more than 100 schools, applicable page numbers are found below the search results to link the applicant to additional pages.

An encircled "i" icon ( ) for each school replaces the "More Information" button in the search results. Applicants can view the detail for a school in a new browser window by selecting the icon next to the school.

For Student Application Entry and Student Correction Entry, we added a new School Selection Summary page after the School Selection page. Here, the applicant selects his or her housing plan for each school listed. The reordering functionality for the selected schools (First, Up, Down, and Last options) now appears on this page. We relabeled The "Compare School Information" button to "View Selected School Information."

Need Analysis Income Threshold Increase

The income threshold for an automatic zero EFC has been increased from $31,000 to $32,000 for the 2012-2013 Award Year.

Pacific Islander Social Security Number Changes

In a June 23, 2011 electronic announcement, we notified the community of new Social Security Administration (SSA) guidelines for assigning Social Security Numbers (SSNs). SSA is now assigning SSNs in previously unused numeric ranges, including the range beginning with "8," which we have used in the past for assigning pseudo-SSNs beginning with "888" to applicants from the Pacific Islands.

Because most Pacfic Island applicants do not have SSNs when they complete the FAFSA, they are assigned a pseudo-SSN for federal student aid purposes by the CPS, FAFSA on the Web, FAA Access to CPS Online, and possibly by other third-party or mainframe systems.

On October 23, 2011, our systems (the CPS, FAFSA on the Web, FAA Access to CPS Online, Federal Student Aid PIN Web site, and EDExpress for Windows software) were updated to permanently address the new SSA guidelines. After October 23, 2011, Pacific Island students submitting new applications should enter "666" in the SSN field instead of "888" and Pacific Island students submitting corrections should use the new "666" pseudo-SSN they received as a result of the application being processed. For more information on the changes to each of these systems, see the October 7, 2011 electronic announcement posted on the IFAP Web site.

Disabling the Verification Tool for the 2012-2013 Processing Cycle

Due to recent regulatory modifications, the verification process is undergoing change. When we began exploring system design requirements for the 2012-2013 Verification Tool, a component of the FAA Access to CPS Online Web site, we determined the effort to design and build a tool for 2012-2013 would be extensive and provide only a partial solution for meeting current verification requirements. Therefore, we have decided to suspend the Verification Tool for 2012-2013. Discussions about the Verification Tool for 2013-2014 and beyond are ongoing.

Note: The Verification Tool is still available for the 2011-2012 processing year.

2012-2013 Application Processing System Schedule

Schedule for the 2012-2013 Application Processing System

Date	Event
May 24, 2011	The Secretary of Education announces the annual updates to the tables used in the statutory "Federal Need Analysis Methodology" to determine an applicant's EFC for the 2012-2013 Award Year (May 24, 2011 [76 FR 30139]) The Secretary announces updates on June 17, 2011 (76 FR35431)
July 15, 2011	Federal Student Aid announces the availability of the *2012-2013 Electronic Data Exchange (EDE) Technical Reference* draft (including the ISIR Record Layout and ISIR Cross-Reference) on the IFAP and FSAdownload Web sites. The *EDE Technical Reference* provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid.

Schedule for the 2012-2013 Application Processing System (Continued)

Date	Event
August 9, 2011	Federal Student Aid announces the availability of the *2012-2013 Application Processing System Specifications for Software Developers* on the IFAP and FSAdownload Web sites. The *Application Processing System Specifications for Software Developers* provides CPS system edits that can assist you in designing and building your own software to communicate with Federal Student Aid.
August 25, 2011	Federal Student Aid announces the availability of the *2012-2013 EFC Formula Guide* on the IFAP Web site, pending final 2011 IRS tax legislation. This guide can be used to calculate an EFC.
October 12, 2011	Federal Student Aid announces the availability of the *2012-2013 Electronic Data Exchange (EDE) Technical Reference* on the IFAP and FSAdownload Web sites. The *EDE Technical Reference* provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid. The *EDE Technical Reference* includes information about record layouts, required edits, printing, and reject messages.
October 14, 2011	Federal Student Aid announces the availability of the *2012-2013 CPS Test System User Guide* on the FSAdownload Web site. This user guide describes the CPS Test System, a system in which you can test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment). The test system will be available on December 18, 2011.
October 18, 2011	Federal Student Aid announces the availability of the 2012-2013 ISIR Guide on the IFAP and FSAdownload Web sites. The *ISIR Guide* assists FAAs in interpreting applicant information from an ISIR.
November 1, 2011	The 2012-2013 Federal School Code List is available online on the IFAP Web site.

Schedule for the 2012-2013 Application Processing System (Continued)

Date	Event
November 2, 2011	Federal Student Aid announces the availability of the *2012-2013 SAR Comment Codes and Text* guide on the IFAP and FSAdownload Web sites. The *SAR Comment Codes and Text* guide provides the SAR comment codes, comment text, reject resolutions, and database match information.
November 15, 2011	In preparation for the 2012-2013 processing cycle, postsecondary schools, high schools, libraries, and community agencies can begin to place orders for the FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system (FSA Pubs) located at FSAPubs.org. The worksheet is a tool to assist students and parents who complete their FAFSA on the Web and generally follows the flow and logic of the online application. FSAPubs is your source for real-time information about Federal Student Aid's publications and their availability.
Mid-November 2011	Federal Student Aid posts an electronic announcement asking schools to remind applicants to update their mailing and e-mail addresses in the CPS by January 6, 2012, so that Renewal Reminders can be sent to the correct address. A similar reminder message is posted on the FAFSA on the Web site during the same timeframe.
December 18, 2011	The 2012-2013 FAFSA on the Web and FAA Access to CPS Online Demonstration sites are available at fafsademo.test.ed.gov. The user name is "eddemo" and the password is "fafsatest."
December 18, 2011	The CPS Test System is available. You can test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment).
December 2011	The PDF version of the FAFSA on the Web Worksheet is available to applicants on the Student Aid on the Web site (studentaid.ed.gov) and the FAFSA on Web site (fafsa.gov) and to schools on the IFAP Web site.

Schedule for the 2012-2013 Application Processing System (Continued)

Date	Event
Late December 2011	The PDF version of the FAFSA is available for download from the FAFSA on the Web site. Schools can also access the PDF from our Web sites, including FSAPubs.org.
Late December 2011	Students and parents can begin requesting up to three copies of the paper FAFSA from the Federal Student Aid Information Center (FSAIC) by calling **800/4-FED-AID (800/433-3243)**.
December 2011	Federal Student Aid begins shipping orders of the 2012-2013 FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system located at FSA Pubs.
January 1, 2012	The 2012-2013 FAFSA on the Web site is available to applicants.
January 1, 2012	The 2012-2013 FAA Access to CPS Online Web site (faaaccess.ed.gov) is made available to FAAs.
January 3, 2012	The 2012-2013 CPS begins processing.
Early January 2012	EDExpress for Windows 2012-2013, Release 1.0, which includes Global, Application Processing, and Packaging functionality for the 2012-2013 processing cycle, is posted to the FSAdownload Web site.
January 6, 2012	For applicants to receive a 2012-2013 Renewal Reminder, any needed corrections to 2011-2012 applicant records must be made by January 6, 2012. These corrections can include updating e-mail or mailing addresses or resolving 2012-2013 renewal eligibility issues, such as rejects. For example, if an applicant does not have a 2011–2012 transaction with an EFC because all transactions have reject codes, the rejects must be corrected by January 6, 2012 to create a valid transaction so that the applicant receives a reminder notification for the new award year. You can continue to submit 2011-2012 applications and correction transactions for 2012-2013 renewal eligibility purposes after January 6, 2012, but affected applicants do not receive Renewal Reminders. These applicants have access to their renewal FAFSA data, however.

Schedule for the 2012-2013 Application Processing System (Continued)

Date	Event
January 13, 2012 – February 10, 2012	Renewal Reminders are sent to renewal-eligible applicants who have not yet filed a 2012-2013 FAFSA.
January 2012	If necessary, Federal Student Aid announces the availability of the revised *2012-2013 Application Processing System Specifications for Software Developers* on the IFAP and FSAdownload Web sites.
February 1, 2012	The IRS Data Retrieval Tool is available to applicants.
Late March 2012	EDExpress for Windows 2012-2013, Release 2.0, which includes the William D. Ford Federal Direct Loan (Direct Loan), Federal Pell Grant (Pell Grant) and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules for the 2012-2013 cycle, is posted to the FSAdownload Web site.
June 2012	The 2012-2013 ISIR Analysis Tool is available on the FAA Access to CPS Online Web site. The ISIR Analysis Tool is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (either federally selected or defined by the school).
	A demonstration (demo) version of the ISIR Analysis Tool is also available at this time as part of the FAA Access to CPS Online demo site, located at fafsademo.test.ed.gov. You must provide your institution's Federal School Code, the user name ("eddemo"), and password ("fafsatest") to access the demo version of the ISIR Analysis Tool.
Mid-June 2012	Direct Loan (DL) Tools for Windows, Release 12.0, is posted to the FSAdownload Web site. DL Tools is a supplemental software product for Direct Loan participants and contains Rebuild, Cash Management, and Compare functionalities for the 2010-2011, 2011-2012, and 2012-2013 cycles.

Schedule for the 2012-2013 Application Processing System (Continued)

Date	Event
Late-June 2012	The CPS accepts 2011-2012 paper and electronic FAFSAs and renewal FAFSAs until late-June 2012. Watch the IFAP Web site for a Federal Register Notice that finalizes this deadline. Electronic FAFSAs must be transmitted to and received by the CPS by midnight Central Time (CT) to meet the deadline.
Mid-September 2012	The CPS accepts 2011-2012 paper and electronic corrections until mid-September 2012. Watch the IFAP Web site for a Federal Register Notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.
Late-June 2013	The CPS accepts 2012-2013 paper and electronic FAFSAs until late June. Watch the IFAP Web site for a Federal Register Notice that finalizes this deadline. Electronic FAFSAs must be transmitted to and received by the CPS by midnight CT to meet the deadline.
Mid-September 2013	The CPS accepts 2012-2013 paper and electronic corrections until mid-September 2013. Watch the IFAP Web site for a Federal Register Notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.

Summary of Changes to the 2012-2013 Paper Free Application for Federal Student Aid (FAFSA) and FAFSA on the Web Site

2012-2013 FAFSA and FAFSA on the Web Worksheet Availability

FAFSA

While most applicants use FAFSA on the Web to apply for financial aid, paper application options are still available. The paper FAFSA is a ten-page form (six application pages and four instructional pages) used for applying for Title IV aid. The FAFSA is also available as an electronic PDF document that can be printed and submitted by postal mail.

Paper FAFSA Request

Beginning in late December 2011, applicants and families can request up to three copies of the paper FAFSA (in English or Spanish) by calling the Federal Student Aid Information Center (FSAIC) toll-free at **800/4-FED-AID (800/433-3243)**.

PDF FAFSA Availability

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

English and Spanish 508-compliant PDF versions of the 2012-2013 FAFSA will be available online for download in December 2011 from IFAP. Schools can also access the PDF FAFSA from our Web sites, including FSAPubs (in December 2011) and FAFSA on the Web (in late-December 2011), by selecting the PDF link from "Other Filing Options" link.

FAFSA on the Web Worksheet

The FAFSA on the Web Worksheet is an effective tool applicants can use to complete the online application process. Applicants can complete the worksheet in preparation for their electronic application submission. The FAFSA on the Web Worksheet is a paper or electronic PDF document that presents the FAFSA questions in the order in which they appear on FAFSA on the Web. This form is available for bulk orders or printed from the Web.

The 2012-2013 FAFSA on the Web Worksheet is available for bulk order by schools. We recommend you continue to remind applicants and their parents that the worksheet is not a FAFSA and is not processed as such if submitted by mail.

FAFSA on the Web Worksheet Paper Request

Orders for the 2012-2013 FAFSA on the Web Worksheet can be placed beginning November 15, 2011. At that time, postsecondary schools, high schools, libraries, and community agencies can submit orders for copies of the FAFSA on the Web Worksheet from FSAPubs.org. Distribution begins in mid-December 2011. Additional worksheets can be ordered from the FSAPubs Web site throughout the processing year.

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

FAFSA on the Web Worksheet PDF Availability

The FAFSA on the Web Worksheet will also be available in PDF format in mid-December 2011 on Student Aid on the Web, IFAP, and FAFSA on the Web.

2012-2013 Paper FAFSA Changes

This section describes changes and enhancements to the *paper* 2012-2013 FAFSA, many of which are implemented on FAFSA on the Web. No new questions were added for 2012-2013, and the question numbering remains the same as 2011-2012.

We implemented the following changes to the paper FAFSA:

- **Colors** – The 2012-2013 FAFSA colors are orange for student information and purple for parent information.

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

- **Enhanced Wording of "Using Your Tax Return" Instructions** – We revised the text in the "Using your Tax Return" on page 1 to explain that the easiest way to correct tax information is by using the IRS Data Retrieval Tool on the FAFSA on the Web site.

- **Minor Wording Changes to the Notes and Questions** – We made some minor wording changes to the notes and a couple of questions to enhance clarity.

- **Homeless Youth Definition (Questions 55-57) –** We revised the description of "homeless youth" for clarity.

- **Added Last Name Suffix Instructional Text** – New instructions on the FAFSA direct the applicant or applicant's parent to include a space between his or her last name and a last name suffix.

- **Added Homeless Youth Determination to the "College Use Only" section** – To simplify the FAA override process, we added a Homeless Youth Determination field next to the D/O (dependency override) field on page 8 of the FAFSA. If you determine that an applicant is a homeless youth, you select the new option. You should not select both the dependency override and homeless youth determination circles. You must also provide your institution's Federal School Code and sign the application.

2012-2013 FAFSA on the Web Changes and Enhancements

We described the following changes and enhancements to the FAFSA on the Web site for 2012-2013 in the "Major Changes" section earlier in this guide:

- IRS Data Retrieval Tool Enhancements
- IRS Data Retrieval Notifications
- New Reject for Changes to Student Marital Status Date
- Gender Question Changes
- Enhanced High School and Federal School Code Search Features

Additional changes to the FAFSA on the Web site described in this section are:

- Change to Asset Threshold Field Display
- High School Fields Prefilled for FAFSA Renewal

Change to Asset Threshold Field Display

We changed the way we display the Student's Total Assets Exceeded and Parents' Total Assets Exceeded filtering questions in Student Application Entry and Student Correction Entry.

For 2012-2013, the applicant's response to an Asset Threshold filtering question is removed (changed to a blank value) if the following is true:

- Marital status (student's or parents') has been changed (from married to not married or from not married to married), OR
- Date of birth (student's or older parent's) changes by three years or more, AND
- Answer to the Asset Threshold filtering question (student's or parents') was "No."

We remove the applicant's initial response to the filtering question because the marital status and date of birth were used to determine the threshold amount for the question the applicant answered. If the applicant changes the marital status or date of birth, and is not Simplified Needs Test or Automatic Zero EFC eligible, the question is asked again with a new threshold amount based on the corrected marital status and/or age.

High School Fields Prefilled for FAFSA Renewal

For 2012-2013, we include the following additional fields when we prefill a FAFSA Renewal record for a renewal eligible student who submitted the information with his or her 2011-2012 FAFSA:

- High School Name
- High School City
- High School State

We Value Your Comments and Suggestions!

Federal Student Aid continually seeks new and innovative ways to make applying for financial aid easier and more convenient for students and their families. Some of the changes we made to the 2012-2013 paper FAFSA and Web applications were the result of feedback and comments we received from you. As always, we appreciate your contributions to improving our systems and processes and encourage you to continue to share your suggestions with us. We are particularly interested in ways to continue simplifying the paper and online FAFSA by eliminating unnecessary data collection.

We encourage you to watch IFAP in 2012, when we will post a Federal Register Notice requesting public comments on the 2013-2014 FAFSA.

Summary of Changes to FAA Access to CPS Online

Enrollment Requirements

FAA Access to CPS Online

To ensure your school can take full advantage of 2012-2013 enhancements at the beginning of the processing cycle, the Primary Destination Point Administrator (DPA) of the TG Number used to send and receive FAFSA and ISIR correction data should verify your enrollment status.

If your school is enrolled for 2011-2012, your enrollment carries over to 2012-2013.

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

If your school is not enrolled for CPS Online services, your school's Primary DPA can complete the enrollment for FAA Access to CPS Online Web site services for your school, including access to R2T4 on the Web and the ISIR Analysis Tool, through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at fsawebenroll.ed.gov.

An SAIG-FAA User Statement must be printed by the Primary DPA and signed by new users of the FAA Access to CPS Online, R2T4 on the Web, or ISIR Analysis Tool Web sites. While you are not required to mail SAIG-FAA User Statements to FSA's Participation Management system, you must retain signed copies at your school.

To access the FAA Access to CPS Online Web site (faaaccess.ed.gov), you must use an FSA User ID and password. Any FAA Access users at your school who do not have an FSA User ID can acquire one by completing the FSA User ID enrollment process. For more information on the FSA User ID creation process, see the April 6, 2009 electronic announcement posted on the IFAP Web site.

Note: In addition to the active confirmation process described above, we have begun to roll out a new security initiative referred to as Two Factor Authentication (TFA) that will impact FAA Access users. As part of the TFA initiative, some Primary DPAs have already received e-mail notifications related to confirming authorized users for the purposes of receiving TFA tokens. Monitor the IFAP Web site for detailed information related to this new initiative.

R2T4 on the Web

Your staff members must be enrolled for FAA Access to CPS Online and Return of Title IV Funds to access the R2T4 on the Web site. The Primary or Secondary DPA of the TG Number currently used by your school to send and receive FAFSAs and ISIR corrections automatically has access to the FAA Access to CPS Online Web site and can add or modify rights. The Primary or Secondary DPA needs to enroll financial aid staff members for access to the FAA Access to CPS Online *and* R2T4 on the Web sites.

ISIR Analysis Tool

Your staff members must be enrolled for FAA Access to CPS Online and the ISIR Analysis Tool to access the ISIR Analysis Tool. The Primary or Secondary DPA of the TG Number currently used by your school to send and receive FAFSAs and ISIR corrections automatically has access to the FAA Access to CPS Online Web site and can add or modify rights. The Primary or Secondary DPA needs to enroll financial aid staff members for access to the FAA Access to CPS Online *and* ISIR Analysis Tool Web sites.

EDExpress 2012-2013 FAA Access Interface

To access the FAA Access to CPS Online Web site (including R2T4 on the Web and the ISIR Analysis Tool) through the EDExpress 2012-2013 interface, you must follow the same enrollment procedures and use the same FSA User ID and password login credentials as you would to access the sites using your Web browser outside of EDExpress 2012-2013.

You can enter your TG Number, school code, and Application Save/Restore Password (used for initial applications only) in EDExpress FAA Access setup (**Tools**, **Setup**, **Global**, **FAA Access**) or enter them each time you connect to FAA Access to CPS Online through the FAFSA and Student Inquiry tabs in EDExpress. You are prompted for your FSA User ID and password (which are not stored in the EDExpress database and must be provided separately).

Note: To avoid being prompted for your FSA User ID and password each time you open a student record in EDExpress when making changes on the FAA Access to CPS Online Web site, open a Web browser, such as Internet Explorer, or start an instant messaging program and leave it running in the background. As long you have at least one Web browser open or an instant messaging program running, the session remains active and you are not required to reauthenticate. Note, however, that session timeout rules still apply.

FAA Access to CPS Online Application Processing

Changes to FAA Access to CPS Online (FAA Access) for 2012-2013 are discussed in detail in the "Major Changes" section earlier in this guide. In this section, we provide information about the following changes as they relate to the FAA using FAA Access:

- New IRS Request Flag Descriptions

- New Reject Override for Reject 21

- New Asset Threshold Fields

- Dependency Override Field Options

- Enhanced High School and Federal School Code Search Features

- High School Fields Prefilled for FAFSA Renewal

- Disabling the Verification Tool for 2012-2013

New IRS Request Flag Descriptions

We added two new IRS Request flag values (05 and 06) for 2012-2013. In addition, we reworded the descriptions for the Student and Parent IRS Request flag values in Student Inquiry to provide clarity. The values can be found in the "Enhanced IRS Data Tracking" topic in the "Major Changes" sections earlier in this guide.

New Reject Override for Reject 21

As we described in the "Major Changes" section earlier in this guide, when an applicant changes his or her marital status date to a date that falls between the original FAFSA submission date and the correction submission date, the applicant's correction record is rejected for Reject 21.

The following information in FAA Access alerts the FAA when Reject 21 has been set:

- The Marital Status Date and Date Completed are highlighted on the eSAR. Comment code 119 is listed in the "Financial Aid Office Use Only" section and the text related to the comment code is included in the "Comments About Your Information" section. The "For Financial Aid Office Use Only" section displays Reject 21 in the Rejects Met field.

- In Student Inquiry, the Marital Status Date and Date Completed are highlighted. Comment code 119 is listed in the "FAA Information" section and the text related to the comment code is included in "Comments." The Rejects Met field displays Reject 21.

- ISIR Compare displays comment code 119.

To override Reject 21, open the applicant's FAFSA in FAA Correction Entry and confirm the ISIR values for his or her marital status and marital status date by reentering the same values in the Enter Correct Value field. FAA Access sets and transmits a reject override code in the applicant's record that causes the edit to be suppressed. If no other rejects are set, an EFC is calculated. Reject Override 21 is displayed:

- On the eSAR in the "For Financial Aid Office Use Only" section;

- On the "FAA Information" page in Student Inquiry; and,

- In ISIR Compare.

New Asset Threshold Fields

In the "Major Changes" section earlier in this guide, we describe two new ISIR fields: Student's Asset Threshold Exceeded and Parents' Asset Threshold Exceeded. The fields, which indicate the applicant's responses to the asset threshold filtering questions, are displayed in Student Inquiry on the Student Income/Assets page and, when applicable, on the Parent Information page.

The Asset Threshold filtering questions and the applicant's response continue to be displayed in FAA Correction Entry when the applicant completes or corrects his or her FAFSA using FAFSA on the Web. However, the applicant's response to the Asset Threshold filtering question is removed (changed to a blank value) in FAA Correction Entry if the corresponding:

- Marital status (student's or parents') has been changed (from married to not married or from not married to married), OR

- Date of birth (student's or older parent's) changes by three years or more, AND

- Answer to the Asset Threshold filtering question (student's or parents') was "No."

We remove the applicant's prior response to the filtering question because the asset threshold amount in the question the applicant answered was based on the marital status and date of birth in that transaction. If the FAA changes the marital status or the date of birth, and the applicant is not Simplified Needs Test or Automatic Zero EFC eligible, the question is asked again with a new threshold amount based on the marital status and date of birth in the FAA Correction transaction.

Note: When the older parent's age on the current transactions is compared to the older parent's age on the originating transaction, it does not have to be the same parent. For example, the father can be the older parent on the originating transaction and the mother become the older parent on the correction transaction. In this example, the comparison is between the mother's age on the correction transaction and the father's age on the originating transaction.

Dependency Override Field Options

As we described earlier in the "Major Changes" section in this guide, we added a new option in FAA Application/Renewal Entry and FAA Correction Entry for reporting a homeless youth determination in the Dependency Override field. In addition, we reworded the descriptions for the Dependency Override options for clarity. FAAs can now select from the following options:

    1 – FAA override from dependent to independent

    2 – FAA override canceled

    3 – FAA override failed

    4 – FAA homeless youth determination

    Blank – No FAA override

Enhanced High School and Federal School Code Search Features

We redesigned and enhanced the high school and Federal School Code searches to provide more accurate and relevant results based on the keywords the FAA enters. The new rules for keyword searches in FAFSA on the Web apply to FAA Application/Renewal Entry and FAA Corrections Entry as well. See the "Enhanced High School and Federal School Code Search Features" topic in the "Major Changes" section earlier in this guide for more information.

A new "Best Match" sort option is available for the search criteria entered in FAA Access. The "Best Match" option displays the search results in the order of relevance, with the closest match first. Results with the same relevance are displayed in alphabetical order (A-Z) by school name.

High School Fields Prefilled for FAFSA Renewal

For 2012-2013, we include the following additional fields when prefilling a FAFSA Renewal record for a renewal eligible student who submitted the information with his or her 2011-2012 FAFSA:

- High School Name
- High School City
- High School State

Disabling the Verification Tool for 2012-2013

The Verification Tool is disabled for the 2012-2013 processing cycle. When you select 2012-2013 on the "Destination/Federal School Code Entry" page, we remind you the Verification Tool is not available for that processing cycle.

See the "Disabling the Verification Tool for the 2012-2013 Processing Cycle" topic in the "Major Changes" section earlier in this guide for additional information.

Note: The Verification Tool is still available for the 2011-2012 processing year.

Return of Title IV Funds (R2T4) on the Web

R2T4 on the Web is a non-year-specific application developed to calculate the earned and unearned portion of Title IV program assistance in accordance with section 484B of the Higher Education Act. At this time, no changes to R2T4 on the Web are anticipated for the 2012-2013 cycle.

Note: For more information on performing R2T4 calculations for the Iraq and Afghanistan Service Grant, see the "Major Changes" section in the *2011-2012 Summary of Changes for the Application Processing System* guide posted on the IFAP and FSAdownload Web sites.

R2T4 on the Web is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site and from the View menu in EDExpress.

Note: For more information regarding Federal Student Aid training on R2T4 on the Web, see Dear Colleague Letter ANN-09-27, posted on September 2, 2009 to the IFAP Web site.

ISIR Analysis Tool

The ISIR Analysis Tool Web application is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (either selected by ED or defined by the school).

The ISIR Analysis Tool is accessible through the FAA Main Menu of the FAA Access to CPS Online Web site and from the View menu in EDExpress. You must have Microsoft Internet Explorer Version 6.0, Service Pack 2, or higher to use the reporting features available in the ISIR Analysis Tool. The site also supports Versions 1.5 and 2.0 of the Mozilla Firefox browser.

Note: Using the ISIR Analysis Tool does not necessarily mean that your school is in the Quality Assurance (QA) Program or is exempt from federal verification requirements. To have these benefits, you must have a signed QA Amendment to your Title IV Program Participation Agreement (PPA).

Note: Demonstration functionality for the ISIR Analysis Tool will be added to the FAA Access to CPS Online Web demo site in June 2012. This demonstration site, which automatically preloads with test ISIRs, allows schools interested in using the ISIR Analysis Tool to examine features such as standard and ad-hoc report generation in a mock-production environment.

2012-2013 Enhancements to the ISIR Analysis Tool

The 2012-2013 version of the ISIR Analysis Tool will be available in June 2012 and includes the following enhancements:

- **Year References and Message Classes Updated for 2012-2013** – Labels and other text on the ISIR Analysis Tool Web site are updated to reference the 2012-2013 cycle. The message class for export files listing all student records in your ISIR Analysis Tool database is updated to IATX13OP.

- **New ISIR Data Elements and Field Values Added to the ISIR Analysis Tool Database** – New ISIR fields and field values for 2012-2013 are added to your ISIR Analysis Tool database because of an ISIR data request. For more information on 2012-2013 ISIR changes, see the *2012-2013 ISIR Guide*, which is available on the IFAP and FSAdownload Web sites.

- **New Institution Verification Criteria Field and Report Filters Available –** A new pre-defined field labeled Institution Verification Criteria is added to the ISIR Data Request record layout and ad hoc report functionality in the ISIR Analysis Tool. You can add data to this new 40-character field in your ISIR Data request files to capture school-specific verification criteria met by individual records you are requesting. The Institution Verification Criteria field data you provide in your request is included with the ISIR data in your ISIR Analysis Tool database.

  We also added standard and ad hoc report filters for the Institution Verification Criteria field to the ISIR Analysis Tool, enabling you to limit report output to students with school-specific verification criteria you provided.

Summary of Changes to the 2012-2013 Central Processing System (CPS)

Overview

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

- Database Matches
- CPS Edits
- Need Analysis
- Application Output Sent to Students
- Other Noteworthy Information

Information about changes to the ISIR Record Layout is found in the *2012-2013 Electronic Data Exchange (EDE) Technical Reference*, which is available on the IFAP and FSAdownload Web sites.

Database Matches

For 2012-2013, no changes were made to the edits associated with external match agencies.

Central Processing System (CPS) Edits

We incremented the year references in data element field titles and year parameters in our edits by one year and revised edits for requirement changes. We also added and modified several CPS edits for 2012-2013. The significant edit changes are described below.

- **Deleted Reject P** – The SSA changed its guidelines for SSN assignment in 2011 and no longer restricts certain ranges from use. As a result, the CPS no longer performs edit checks to make sure the SSN is in the SSA's valid ranges of SSNs, and we no longer assign Reject P based on SSN values outside those ranges.

- **Added New Reject 21 Edits to Identify Marital Status Date Corrections** – We added a new reject reason, Reject 21, to identify an applicant who corrected his or her marital status date to a date that falls between the original FAFSA submission date and the correction submission date. See the "Enable FAAs to Override Rejects for Changes to Student Marital Status Date" topic in the "Major Changes" section for additional information.
    - This new edit identifies an applicant whose marital status date is corrected to a date that is after the original application receipt date but before the correction transaction receipt date.
    - Records that have Reject 21 set have comment 119 included on the SAR and ISIR. We also added an FAA Reject Override code 21.

Need Analysis

We updated the need analysis offsets and Income Protection Allowances (IPAs) based on legislative changes and changes to questions on the 2012-2013 FAFSA. The methodology for determining the EFC is found in Part F of Title IV of the Higher Education Act of 1965, as amended.

The income threshold for an automatic zero EFC has increased from $31,000 to $32,000 for the 2012-2013 Award Year.

See the May 24, 2011 Federal Register Notice posted on the IFAP Web site for changes to the 2012-2013 need analysis tables. You can also consult *2012-2013 EFC Formula Guide*, posted to the IFAP Web site on August 25, 2011 for more information.

Application Output Sent to Students

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

- **SAR** – This document is designed to notify the student of application and eligibility status and provide a paper-based means for correcting or confirming application data. Applicants can also request a SAR by calling the Federal Student Aid Information Center at **800/4-FED-AID (800/433-3243)**.

- **SAR Acknowledgement** – This document is designed to notify the student of application and eligibility status; however, if corrections are needed, the applicant uses Student Correction Entry on the Web or contacts the school to submit corrections through FAA Access to CPS Online or a mainframe system.

- **E-mail Notification of SAR Processing** – This e-mail notifies the student of application and eligibility status more quickly than the paper SAR or the SAR Acknowledgement. The applicant can view the SAR online and print the online SAR document as often as needed. The e-mail includes a link to the FAFSA on the Web login page where the applicant, after being authenticated, can select the View Processed Information option to view the SAR.

For more information on how the CPS determines the type of output document sent to applicants, see Appendix D of the *2012-2013 ISIR Guide*, which can be downloaded from the IFAP and FSAdownload Web sites.

Mockups of the 2012-2013 paper SAR and SAR Acknowledgement can also be downloaded from the IFAP Web site.

SAR Changes

We added more space on the SAR for the college name to be printed and for the applicant to make changes to a college name. To do this, we made the following changes:

- Moved third and fourth college information to page 10.
- Moved the College Navigator text to page 10.
- Revised the layout of page 10.

Paper Output Changes

The following change was made to the paper SAR:

- **Color** – Paper 2012-2013 SARs and SAR Acknowledgements are printed on orange paper to match the color scheme of the 2012-2013 paper FAFSA.

- **Dependency Override values printed on SAR and SAR Acknowledgement** – The Dependency Override field now prints "H" when DO = 4, FAA Homeless Youth Determination. Current values printed include:

  "Y" when DO = **1** (FAA Override of dependent status to independent)

  "N" when DO = **2** (FAA Override canceled)

  "F" when DO = **3** (FAA Override failed)

  "H" when DO = **4** (Homeless Youth Determination)

- **Student IRS Request Flag and Parent IRS Request Flag fields Updated** – These flags were updated to include two new values, 05 and 06, and revised remaining values text for clarity. The new and revised values include:

  Blank = IRS Data Retrieval Tool not available in the application method utilized (i.e., paper FAFSA, EDE, or FAA Access)

  00 = Ineligible to use the IRS Data Retrieval Tool and was therefore not presented with the option to use it in FAFSA on the Web

  01 = Presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web and elected to use it, but did not transfer IRS data into the FAFSA

  02 = IRS data was transferred from the IRS and was not changed by the user prior to submission of an application or correction

  03 = IRS data was transferred from the IRS and changed by the user prior to submission of an application or correction

  04 = IRS data was transferred from the IRS and then changed by the user on a subsequent transaction

  05 = Presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web, but did not elect to use it

  06 = IRS data was transferred from the IRS, but a subsequent change made him or her ineligible to use the IRS Data Retrieval Tool

Other Noteworthy Information

SAR Comments

SAR comments appear on SARs that are mailed to applicants. These comments are also displayed on the eSAR that applicants view from the FAFSA on the Web site and are printed on the ISIR report from EDExpress.

Each year we make annual rollover changes, such as updating year references, item numbers, and deadline dates. We also revise agency names and update mailing addresses and phone numbers where necessary. Some of the more significant changes to the comment code text include the following:

- Added five comments for 2012-2013, as described in the following table:

Comment(s)	Reason Comment(s) Appear on the Record
119	Identifies an applicant who corrected his or her marital status to a date after the application was originally submitted.
163	Identifies a record where an FAA has determined that the applicant is a homeless youth.
315, 316 and 317	Identify Not-For-Profit agency contacts.

- Deleted the following comments:

  - **901 and 902** – These comments were introduced mid-cycle in 2011-2012 to identify transactions on which the applicant was not presented with the asset questions when applying using FAFSA on the Web. We have now made system changes that enable you to identify these transactions. See the "Enhanced Reporting for Applicants Not Required to Provide Asset Information" topic in the "Major Changes" section earlier in this guide for more information.

- Revised the following comments:

  - **137** – This comment previously referred the applicant to the loan servicer to resolve issues with federal student loans. Now comment 137 identifies an applicant who has one or more loans or TEACH Grant service obligations discharged due to total and permanent disability and is not eligible for additional loans.

  - **156, 157, 273, and 274** – These comments have been revised to encourage an applicant and his or her parents to use the IRS Data Retrieval Tool to correct tax information.

  - **181 to 187, 193, 194, 208, 219, 230, 233, and 234** – These comments were revised to change the agency name from "Debt Collection Service" to "Default Resolution Group."

For a full listing of the 2012-2013 SAR comment code text and a description of changes to comment text, see the *2012-2013 SAR Comment Codes and Text* guide, located on the IFAP and FSAdownload Web sites.

Mailing Addresses

FAFSA Processor

FAFSA (Including Pacific Islanders)	Federal Student Aid Programs P.O. Box 4691 Mt. Vernon, IL 62864-0059
PDF FAFSA	Federal Student Aid Programs P.O. Box 4692 Mt. Vernon, IL 62864-4692
Spanish FAFSA	Federal Student Aid Programs P.O. Box 4693 Mt. Vernon, IL 62864-0063
Spanish PDF FAFSA	Federal Student Aid Programs P.O. Box 4697 Mt. Vernon, IL 62864-4697
SAR	Federal Student Aid Programs P.O. Box 4694 Mt. Vernon, IL 62864-0064
Spanish SAR	Federal Student Aid Programs P.O. Box 4695 Mt. Vernon, IL 62864-0065

Signature Pages

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

Getting Help

Customer Service

FSATECH Listserv

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

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

CPS/SAIG Technical Support

800/330-5947 (TDD/TTY 800/511-5806) or 319/665-4762

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

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

E-mail: CPSSAIG@ed.gov

Federal Student Aid Information Center (FSAIC)

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

The Federal Student Aid Information Center (FSAIC) serves the public with information about the federal student aid application process. FSAIC customer service representative support is provided in English and Spanish and includes a toll-free telephone number, Integrated Voice Response Unit (IVRU) self-service, e-mail, online live help, or Web chat. Customers include students, parents, and FAAs seeking general information about federal grant and loan programs and assistance with the FAFSA (paper and FAFSA on the Web versions, including Federal Student Aid PIN assistance) and student aid processing timeframes.

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

Representatives are available Monday through Friday, 8 A.M. to midnight (ET), and on Saturdays 9 A.M. to 6 P.M. (ET) (excluding federal holidays).

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

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

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

Representatives are available Monday through Friday, 9 A.M. to 5 P.M. (ET).

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

CPS Web Applications Demonstration Web Site

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

These demonstration sites offer most of the features of the production Web sites for FAFSA on the Web and FAA Access to CPS Online (including the ISIR Analysis Tool and Return of Title IV Funds), and they are preloaded with test data for your use.

The demonstration site is available for use at fafsademo.test.ed.gov with 2012-2013 options accessible December 18, 2011. The demo version of the ISIR Analysis Tool will be available beginning in June 2012. The demo site update will occur at the same time we release the 2012-2013 production version of the ISIR Analysis Tool.

You can log in to the demo sites, when available, using the following user name and password:

- User Name: eddemo
- Password: fafsatest

Note: The user name and password fields are case-sensitive.

Note: Users of the ISIR Analysis Tool demo site must also provide their Federal School Code during login.

Other Helpful Documents

We encourage you to review other documents on the IFAP and FSAdownload Web sites for more information about changes to the 2012-2013 application processing system:

- *2012-2013 Application Processing System Specifications for Software Developers,* August 9, 2011: Provides CPS system edits that can assist you in designing or building your own software to communicate with Federal Student Aid. Available on the IFAP and FSAdownload Web sites. A final draft will be posted in January 2012.

- *2012-2013 Electronic Data Exchange (EDE) Technical Reference*, October 12, 2011: Describes the 2012-2013 EDE process and provides programmer specifications and information that can assist you in designing or building your own software to complement or take the place of the EDExpress software to exchange data electronically with Federal Student Aid. Available on the IFAP and FSAdownload Web sites.

- *2012-2013 ISIR Guide*, October 18, 2011: Provides in-depth information regarding the 2012-2013 Institutional Student Information Record (ISIR). Available on the IFAP and FSAdownload Web sites.

- *2012-2013 SAR Comment Codes and Text*, November 2, 2011: Describes changes to the SAR comment codes and associated text for 2012-2013 as well as database match information. Available on the IFAP and FSAdownload Web sites.

- *2012-2013 EFC Formula Guide*, August 25, 2011: Provides worksheets and tables that can be used to calculate an estimated EFC for students. Available on the IFAP Web site.

- English and Spanish versions of the FAFSA and FAFSA instructions will be available in December 2011 for download from ifap.ed.gov/ifap/processing/fafsaAndSARMaterialsPR.jsp.

- English and Spanish versions of the draft SAR and SAR Acknowledgement, available for download from ifap.ed.gov/ifap/processing/fafsaAndSARMaterialsPR.jsp.

- English and Spanish versions of the Student Eligibility Worksheet, available for download from ifap.ed.gov/ifap/byAwardYear.jsp?type=drugworksheets.

- English and Spanish versions of the FAFSA on the Web Worksheet will be available for download in December 2011 from FAFSA on the Web. Select the Browse Help option from the top navigation bar on the FAFSA on the Web home page. A link to the FAFSA on the Web Worksheet is provided in the Browse Help topics.

Federal Student Aid Web Sites

- Central Processing System (CPS) Web Applications Demonstration Web site: fafsademo.test.ed.gov

- FAA Access to CPS Online (including R2T4 on the Web and the ISIR Analysis Tool): faaaccess.ed.gov

- FAFSA on the Web: fafsa.gov

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

- FSAdownload Web site: fsadownload.ed.gov

- Federal Student Aid PIN: pin.ed.gov

- Federal Student Aid Publication Ordering: FSAPubs.org

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

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

- Quality Assurance Web site: ifap.ed.gov/qahome/Default.html

- Student Aid Internet Gateway (SAIG) Enrollment: fsawebenroll.ed.gov

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

Appendix: Outline of Major Changes

Introduction

In this section, we provide an outline of the 2012-2013 major changes to the application processing system. You can copy and paste this list into a word processing document and customize the text as needed to prepare your staff for the upcoming award year.

Be aware that this outline may not include all items that you feel are important to you and your staff. If you plan to use it as a training tool, review the *Summary of Changes for the Application Processing System* guide in its entirety to supplement your training.

Outline of 2012-2013 Changes

Internal Revenue Service (IRS) Data Retrieval Tool Enhancements

The Department of Education continues to enhance the IRS Data Retrieval Tool to improve the accuracy of financial information collected from applicants.

- **February 1, 2012 Implementation Date** – For 2012-2013, the IRS Data Retrieval process will be implemented on February 1, 2012.

- Major changes include:
  - **New Filtering Question** – A filtering question asks the applicant (and the applicant's parents, if applicable) when and how he or she filed a tax return to determine if he or she should transfer tax information from the IRS into the FAFSA.
  - **Dynamically Displayed Messaging** – Based on the applicant's response to the filtering question, new messages recommend or prohibit the use of the IRS Data Retrieval Tool to transfer tax information from the IRS into the FAFSA.
  - **Enhanced IRS Data Tracking** – By encouraging applicants and their parents to transfer tax information from the IRS Web site into the FAFSA, we ensure accurate information is provided on the FAFSA. For 2012-2013 we:
    - Enhanced tracking to identify applicants or parents who appear to be eligible to transfer tax information from the IRS Web site, but have not.
    - Reworded the IRS Request Flag values and added two new values, 05 and 06 to describe the tracking of IRS data more clearly.
  - **Notifications to Applicants** – To encourage use of the IRS Data Retrieval Tool by students and parents who appear to be eligible to use the Tool, but have not, we updated existing communications and added new e-mail notifications.
    - **Existing Communications** – We revised the Student Processed SAR E-mail, SAR comment text, and Confirmation pages.
    - **New Notifications –** We will begin sending e-mail notifications to encourage certain applicants and their parents to use the IRS Data Retrieval Tool.
      - **Tax Estimators** – In mid-March, 2012, we will send e-mail notifications to students and parents who submitted a FAFSA before filing taxes and have not updated their filing status. Second notifications will be sent in early-May 2012.
      - **Tax Filers** – From early April, 2012 through the end of the processing year, we will also periodically send one-time e-mail notifications to students and parents who submitted a FAFSA that indicated a tax filing status of "already filed" and who did not transfer tax information from the IRS.

Enable FAAs to Override Rejects for Changes to Student Marital Status Date

As a result of the regulations effective July 1, 2012, FAAs have the discretion to ask an applicant to update marital status information for changes that occur after the initial application was submitted. If the FAA determines the update is necessary to address an inequity or to more accurately reflect the applicant's ability to pay, the FAA can override the resulting marital status reject edit.

- To support this new regulation, we added a new reject (Reject 21) with comment code 119 and a new corresponding reject override code (Reject Override 21).

Enhanced Reporting for Applicants Not Required to Provide Asset Information

In 2011-2012 FAFSA on the Web, we added new logic and an asset threshold filtering questions allowing some applicants to skip asset-related questions if the applicant's eligibility is not affected by providing asset information. The CPS accepts the omission of the asset data and suppresses Reject 1. After implementing this change vendors encountered issues due to the lack of information on the ISIR to indicate the applicant was presented with and answered the asset threshold filtering question. On the vendor's system, it appeared that the applicant's record had Reject 1 (missing asset information).

- As our permanent solution, we are adding two new fields on the ISIR for 2012-2013: Student's Asset Threshold Exceeded and Parents' Asset Threshold Exceeded.
    - These fields are included in the ISIR file and printed on the ISIR; they are not printed on the SAR or SAR Acknowledgement.
    - These fields display in Student Inquiry in FAA Access on the Student Income/Assets page and Parent Information page.
    - Valid values include:

        1 = Asset threshold was exceeded; must provide additional asset information

        2 = Asset threshold was not exceeded; no additional asset information is needed

        Blank = Applicant filed on the Web and the asset threshold filtering question was not presented or the applicant filed using a paper FAFSA or an FAA used EDE

Homeless Youth Determination Reporting Changes

Currently, there is no operational distinction between a dependency override request that was submitted to make a dependent applicant independent and one that was submitted as a way of reporting an FAA homeless youth determination that was not, in fact, a dependency override.

- We are adding a new value for a homeless youth determination. A value of "4" in the Dependency Override field indicates the FAA has determined the applicant to be an unaccompanied youth who is homeless or self-supporting and at risk of becoming homeless and, therefore, wants the CPS to treat the applicant as an independent student. Students who are 22 or 23 years of age and determined to be unaccompanied and homeless or self-supporting and at risk of being homeless should have a value of "1" as an FAA dependency override.

Gender Question Changes

In an effort to encourage more applicants to answer the "Are you male or female" question, we added informational text to FAFSA on the Web. The answer to this question is important and should be provided, as most males must be registered with the Selective Service match to qualify for federal student aid. Female applicants are sent to Selective Service when a response is not provided and come back as not matched, which then requires the FAA to follow up.

Enhanced High School and Federal School Code Search Features

We enhanced the high school and Federal School Code search tool for the 2011-2012 and 2012-2013 processing years. Changes to the search tool, which is available from Student Application Entry, Student Correction Entry, FAA Access, and the FAFSA on the Web home page (Federal School Code search only), include:

- Modified keyword search rules
- "Best Match" results
- Redesigned search results (2012-2013 FAFSA on the Web Federal School Code search only)

Need Analysis Income Threshold Increase

Automatic Zero EFC income threshold in needs analysis increased from $31,000 to $32,000.

Pacific Islander Social Security Number Changes

Social Security Administration (SSA) has new guidelines for assigning Social Security Numbers (SSNs). As a result we made changes to the way we assign pseudo-SSNs to applicants from the Pacific Islands.

- The pseudo-SSN we assign is now in the "666" numeric range.
- After October 23, 2011, Pacific Islander students submitting new applications should enter "666" in the SSN field, and students submitting corrections should use the new "666" pseudo-SSN they receive as a result of the application being processed.

Disabling the Verification Tool for the 2012-2013 Processing Cycle

Due to recent regulatory modifications, the verification process is undergoing change and we have suspended the Verification Tool for 2012-2013.

- The Verification Tool is still available for the 2011-2012 processing year.

- Discussion about the Verification Tool for 2013-2014 and beyond are ongoing.

FAFSA Data Element Changes

- **Homeless Youth Definition (Questions 55-57)** – We revised the description of "homeless youth" for clarity.

- **Added Last Name Suffix Instructional Text** – New instructions on the FAFSA direct the applicant or applicant's parent to include a space between his or her last name and a last name suffix.

- **Added Homeless Youth Determination to the "College Use Only" section** – To simplify the FAA override process, we added a Homeless Youth Determination field next to the D/O (dependency override) field on page 8 of the FAFSA.

FAFSA on the Web

In addition to the changes for the IRS Data Retrieval Tool enhancements, IRS Data Retrieval notifications, new Reject 21 for changes to the student's marital status date, gender question messages and enhanced high school and Federal School Code search features we have also made the following changes:

- **Change to Asset Threshold Field Display** – We blank out the applicant's response to the Asset Threshold filtering questions when:
  - Marital status (student's or parents') has been changed (from married to not married or from not married to married), OR
  - Date of birth (student's or older parent's) changes by three years or more, AND
  - Answer to the Asset Threshold filtering question (student's or parents') was "No."

- **High School Fields Prefilled** – On the FAFSA Renewal record we now prefill the high school fields, name, city, and state.

FAA Access to CPS Online Application Processing

In addition to the new IRS Request Flag values and revised descriptions, new reject override for Reject 21, new asset threshold fields, enhanced high school and Federal School Code search, high school fields prefilled for FAFSA Renewal and the disabling of the Verification Tool for 2012-2013 we also made the following change:

- **Dependency Override Field Options** – As part of the new option to report homeless youth in the Dependency Override filed, we also revised the values for the Dependency Override fields for clarity.

ISIR Analysis Tool

- **New ISIR Data Elements and Field Values Added to the ISIR Analysis Tool Database** – New ISIR fields and field values for 2012-2013 are added to your ISIR Analysis Tool database because of an ISIR data request.

- **New Institution Verification Criteria Field and Report Filters Available –** A new pre-defined field labeled Institution Verification Criteria is added to the ISIR Data Request record layout and ad hoc report functionality in the ISIR Analysis Tool. You can add data to this new 40-character field in your ISIR Data request files to capture school-specific verification criteria met by individual records you are requesting. The Institution Verification Criteria field data you provide in your request is included with the ISIR data in your ISIR Analysis Tool database.

  We also added standard and ad hoc report filters for the Institution Verification Criteria field to the ISIR Analysis Tool, enabling you to limit report output to students with school-specific verification criteria you provided.

CPS Edits

- **Deleted Reject P** – The SSA changed its guidelines for SSN assignment in 2011 and no longer restricts certain ranges from use. As a result, the CPS no longer performs edit checks to make sure the SSN is in the SSA's valid ranges of SSNs, and we no longer assign a Reject P based on SSN values outside those ranges.

- **Added New Reject 21 Edits to Identify Marital Status Date Corrections** – We added a new reject reason, Reject 21, to identify an applicant who corrected his or her marital status date to a date that falls between the original FAFSA submission date and the correction submission date. Records that have Reject 21 set have comment 119 included on the SAR and ISIR. We also added an FAA Reject Override code 21.

Application Output Sent to Schools

- **SAR Changes** - We added more space on the SAR for the college name to be printed and for the applicant to make changes to a college name. To do this, we made the following changes:

  – Moved third and fourth college information to page 10.
  – Moved the College Navigator text to page 10.
  – Revised the layout of page 10.

- **Paper Output Changes** –The following change was made to the paper SAR:

- **Color** – Paper 2012-2013 SARs and SAR Acknowledgements are printed on orange paper to match the color scheme of the 2012-2013 paper FAFSA.
- **Dependency Override values printed on SAR and SAR Acknowledgement** – The Dependency Override field now prints "H" when DO = 4, FAA Homeless Youth Determination.
- **Student IRS Request Flag and Parent IRS Request Flag fields Updated** – These flags were updated to include two new values, 05 and 06, and revised remaining values text for clarity.

SAR Comments

For a full listing of the 2012-2013 SAR comment code text and a description of changes to comment text, see the *2012-2013 SAR Comment Codes and Text* guide, located on the IFAP and FSAdownload Web sites.

- **New Comments**
    - **119** – Identifies an applicant who corrected his or her marital status to a date after the application was originally submitted.
    - **163** – Identifies a record where an FAA has determined that the applicant is a homeless youth.
    - **315, 316, and 317** – Identify Not-For-Profit agency contacts.

- **Deleted Comments**
    - **901 and 902** – These comments identified transactions in which the applicant was not presented with the asset questions when applying using FAFSA on the Web.

- **Revised Comments**
    - **137** – This comment now identifies an applicant who has one or more loans or TEACH Grant service obligations discharged due to total and permanent disability and is not eligible for additional loans.
    - **156, 157, 273, and 274** – These comments have been revised to encourage an applicant and his or her parents to use the IRS Data Retrieval Tool to correct tax information.
    - **181 to 187, 193, 194, 208, 219, 230, 233, and 234** – These comments were revised to change the agency name.