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Ohio Association of Student Financial Aid Administrators

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## Financial Aid Update

OACHE Conference 2009  
MorraLee Holzapfel  
Director of Outreach & Member Services  
Ohio College Access Network



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### FAFSA Changes for 09-10:

- Design
- Data Elements added.
  - Expansion of the dependency criteria
    - foster care
    - emancipated minors
    - minors in legal guardianship
    - verified as unaccompanied youth who are homeless or at risk of homelessness
  - Added TEACH grant question to paper FAFSA
  - Field for parents email address
  - Adding 'dislocated worker' to list of criteria that could qualify for SNT or Auto Zero EFC.



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### FAFSA Changes for 09-10:

- Data Elements Deleted:
  - Foreign income exclusion
  - Credit for federal tax on special fuels
  - Worksheet A is deleted
    - EIC
    - Additional Child Tax Credit
    - Welfare Benefits, including TANF
    - SSN benefits received that were not taxed.



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### ***Pell Updates:***

- **Pell Grant**—this is a federal grant, need based as determined by the Free Application for Federal Student Aid (FAFSA)
- Maximum award for 2009-10 is \$5350.



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### ***Pell Updates:***

- Allows students to receive two Pell Grants during a single academic year pending final rules.
- Pell max = \$3,000.00
  - Summer = \$1,000
  - Fall = \$1,000
  - Spring = \$1,000
  - Summer = \$1,000
- Must be enrolled at least half time each term.



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### ***Pell Updates:***

- Sets time limit of up to 18 semesters or equivalent for those who receive first Pell Grant on/after 7/1/08.
- No Pell for those who were incarcerated for sexual offense.
- Auto Zero EFC for Pell eligible students whose parents or guardian was a member of Armed Forces and died in Iraq or Afghanistan after 9/11/01.



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## ACG/SMART award amounts:

PROGRAM/ SCHOOL YEAR	FULL-TIME ANNUAL AWARD	THREE- QUARTER ANNUAL AWARD	HALF-TIME ANNUAL AWARD
ACG - FIRST YEAR	\$750	\$663	\$375
ACG - SECOND YEAR	\$1300	\$975	\$650
SMART GRANT - THIRD YEAR	\$4000	\$3000	\$2000
SMART GRANT - FOURTH YEAR	\$4000	\$3000	\$2000
SMART GRANT - FIFTH YEAR	\$4000	\$3000	\$2000




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## TEACH Grant

- Grant Amounts
  - Up to \$4000 per year
  - Amounts are prorated for less than full-time attendance
- Limits
  - Maximum amount for undergraduate study is \$16,000
  - Maximum amount for graduate study is \$8,000
  - Each school determines which majors are eligible for the program at their school




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## TEACH Service Obligation

- Full-time teacher in high need field
- Must teach in low-income school for four years within 8 years of completion of program
- No credit for part-time teaching
- No partial fulfillment of service
- Failure to complete service obligation causes grant to convert to Direct Unsubsidized Stafford Loan and interest is charged back to the date of grant disbursement




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## **TEACH Eligibility**

- Be majoring in an eligible program (defined by institution)
  - Meet certain academic achievement requirements (generally, scoring above the 75th percentile on a college admissions test or maintaining a cumulative GPA of at least a 3.25)
  - Complete Entrance Counseling each year
    - For 09-10, counseling is now available on-line
  - Complete an Agreement to Serve (ATS) each year
- Entrance Counseling and ATS available at:  
[infos://teach-ats.ed.gov](http://infos://teach-ats.ed.gov)



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## **TEACH - Future update:**

- Effective 7/1/10:
- If academic field was designated as high-need by state in which recipient is teaching, at time grant received, recipient may fulfill teaching obligation in that field even if no longer high need when beginning teaching



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## **www.FAFSA.gov**

- FAFSA Web Address—May 2009
  - Typing the simple web address [www.FAFSA.gov](http://www.FAFSA.gov) now reaches the FAFSA on the Web site
  - Although the current web address will continue to work, this change will decrease the likelihood that students will access non-governmental or paid sites

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**2009-10 Mid-Year Enhancements  
August 2009**

**Enhanced skip logic**

- Selective Service registration
  - Will only be offered to students who are male and younger than 26
- Simplification for students 24 and older and for married students
  - If the applicant is determined to be independent due to date of birth or marital status, only two dependency questions will be displayed (questions 53 and 54 – to help independent applicants accurately report household size)

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**2009-10 Mid-Year Enhancements  
August 2009**

**Identifying Homeless Students**

- A new screening question will display asking applicants if they are homeless or at risk of being homeless
- The three homeless determination questions will only be presented if student is 21 or younger and answers "Yes" to the homeless screening question
- Students who are 22 or 23 and answer "Yes" to the homeless screening question, and students who are 21 or younger but answer "No" to all three homeless determination questions, will be –
  - Taken down an alternate path to allow them to submit their FAFSA without parental data, and
  - Directed to follow-up with their financial aid office

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**2010-11 FAFSA Enhancements**

- Expanded student marital status to four options to accommodate pending implementation of IRS data share process (Question 16)
- Removed veterans' benefits questions because they are no longer required per HEOA
- Added text explaining that the value of military housing or a military housing allowance should not be included as untaxed income benefits (Question 92 and Question 93g)
- Added a question about earnings from work under a cooperative education program at an institution of higher education to be excluded from income (Question 44f and Question 92f)

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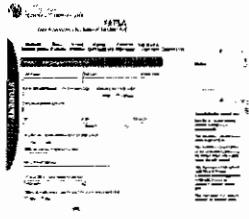
## FAFSA on the Web

2010-11 FOTW redesign  
facilitated by technology  
upgrade

Updated navigation reduces  
the number of pages and  
length of the application

Display of help text and  
instructions will be enhanced  
by:

- use of field instructions
- flyover text
- modal boxes



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## FAFSA on the Web

Status indicators will guide applicants through  
web modules (e.g., student demographics,  
basic eligibility, dependency status)

Student and parent sections of the application  
will be more clearly identified

Dynamic question labels, help text and  
instructions based on applicant profile (e.g.,  
marital status, responses to tax filing status,  
type of tax return filed)

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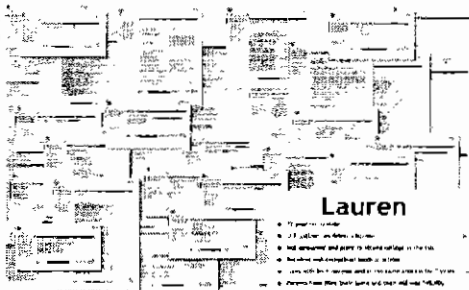
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## 2009-2010 FAFSA



Lauren

- 11 pages in total
- 23 sections in total
- All completed and saved to state website in the fall
- The state will provide the results in the fall
- Users will be able to see their results in the fall
- Parents can see their results and they will see "FAFSA"



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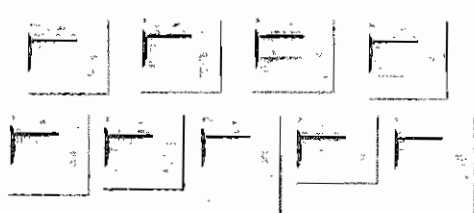
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## 2010-2011 FAFSA



22 Questions are Eliminated  
 25% Reduction in Questions Presented  
 17 Web Screens are Eliminated  
 65% Reduction in Web Screen




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## IRS-FSA Concept Overview

- ✓ Federal Student Aid and the IRS are developing a collaborative solution that simplifies FAFSA completion
- ✓ The new process will allow FAFSA on the Web applicants to request and retrieve their income tax data from the IRS
- ✓ Once the data is retrieved it can be automatically transferred to FOTW

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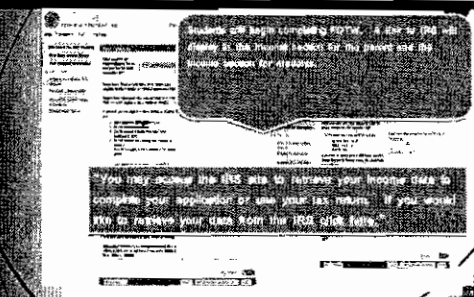
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## How will this process work?



You may receive the IRS data to increase your income data to complete your application or use your tax return. If you would like to transfer your data from the IRS, click here.




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### How will the IRS site be accessed?

Through the FOTW's information system and IRS website

The screenshot shows the IRS website interface. On the left, there is a navigation menu with options like 'Home', 'About Us', 'Contact Us', 'Help', 'Privacy Policy', 'Terms of Use', and 'Accessibility'. The main content area is titled 'Get By The Information' and includes a search bar and several links for finding tax information. The IRS logo is visible in the bottom right corner.

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### How will applicants transfer data to FOTW?

Using "Transfer" of data to the IRS site to the FOTW system

The screenshot shows the IRS website's 'Transfer' section. A prominent 'Transfer' button is visible. Below it is a table titled 'Student <2008> Federal Income Tax Information'. The table lists various tax items and their corresponding amounts. The IRS logo is in the bottom right corner.

Item	2008	2007	2006
Adjusted Gross Income	11,873	11,873	11,873
Exemption	2,000	2,000	2,000
Standard Deduction	2,000	2,000	2,000
Adjusted Gross Income	11,873	11,873	11,873
Exemption	2,000	2,000	2,000
Standard Deduction	2,000	2,000	2,000
Adjusted Gross Income	11,873	11,873	11,873
Exemption	2,000	2,000	2,000
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### State Financial Aid update

- Ohio has many programs
- Funds were cut, but programs exist for FY10-11
- 1-877-I-ATTAIN (428-8246)
- notline@regents.state.oh.us

The OSIA logo is located in the bottom right corner of the slide.

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## State Financial Aid Overview

Ohio College Opportunity Grant (OCOG),  
<http://regents.ohio.gov/sas/ocog/>  
Ohio War Orphans Scholarship,  
[http://regents.ohio.gov/sas/war\\_orphans/](http://regents.ohio.gov/sas/war_orphans/)  
Ohio Safety Officers Memorial,  
<http://regents.ohio.gov/sas/osof/>  
Nurse Education Assistance Loan Program,  
<http://regents.ohio.gov/sas/nealp/>  
National Guard Scholarship,  
[http://www.ong.ohio.gov/scholarship\\_index.html](http://www.ong.ohio.gov/scholarship_index.html)  
Choose Ohio First Scholarship,  
<http://usc.edu/opportunities/partnership/chooseohio1st/index.php>



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## Ohio College Opportunity Grant OCOG

OCOG is a \$171 million program - Student's Pell grant and EFC must be applied toward tuition/general fees before the OCOG award can be determined.

Community colleges -- Pell/EFC combination should cover tuition and general fees at all community colleges and regional campuses. No OCOG awards will be available to students attending these institutions and Central State. Shawnee students limited to \$480.



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## State Financial Aid News

For OCOG eligible students enrolled at private, non-profit institutions, the maximum award is \$2,256—at public main campuses, the maximum award is \$1,008.

Students at private, for-profit institutions not OCOG eligible

War Orphans Scholarship covers 80% of tuition and fees at public universities and community colleges  
\$4,400 annual award at independent and proprietary

Ohio Academic Scholarship is \$2,000 at all institutions



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## Help for Students



Speak with an Information Specialist

Call 1-877-I-ATTAIN (428-8246)  
Mon. - Fri. 10am - 6pm



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## FAFSA

- 4Federal Student Aid Information Center:  
1-800-433-3243  
1-800-4FEDAID
- [www.federalstudentaid.ed.gov](http://www.federalstudentaid.ed.gov)
- [www.fsa4counselors.ed.gov](http://www.fsa4counselors.ed.gov)



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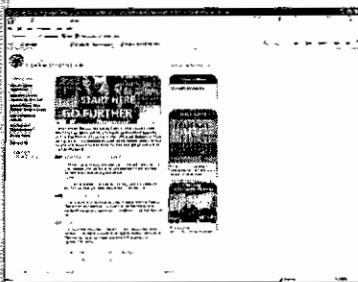
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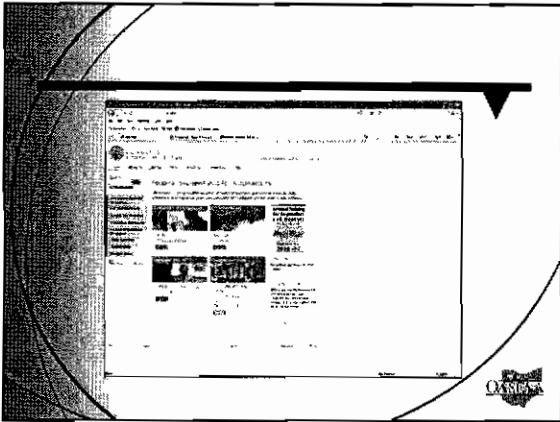
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## **FAFSA**

**FAFSA4caster**

<http://www.fafsa4caster.ed.gov/>

Developed to:

- Foster early awareness with the financial aid application process and form
- Serve as an early analysis tool informing college affordability
- Reduce the time required to submit the "official" financial aid application in the student's senior year of high school



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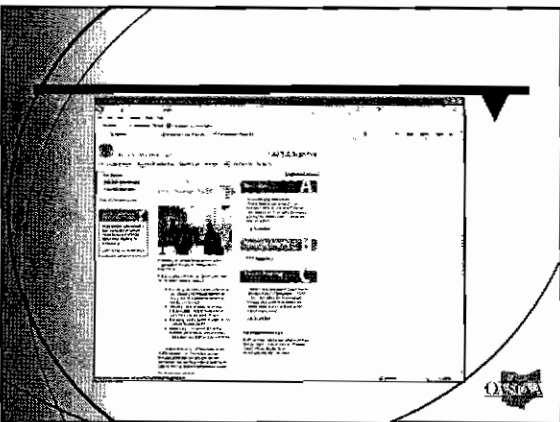
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## FAFSA

FAFSA4caster will:

- Automatically generate a Federal Student Aid PIN for use when signing the FAFSA
- Instantly calculate eligibility for federal student aid
- Generate a FAFSA—a FAFSA populated with student FAFSA4caster data will be available when the student is ready to file the official FAFSA



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## College Goal Sunday

Sunday, February 14, 2010 2:00 PM

Locations throughout Ohio

College Goal Sunday offers the opportunity to have expert help completing the Free Application for Federal Student Aid (FAFSA).

Financial aid professionals from Ohio colleges & universities will be available walk you and your family through the financial aid process.

College Goal Sunday is brought to you by the Ohio Association of Student Financial Aid Administrators (OASFAA).

• Need information for College Goal Sunday?  
Call Ohio's College Access Information Hotline  
1-877-428-8246



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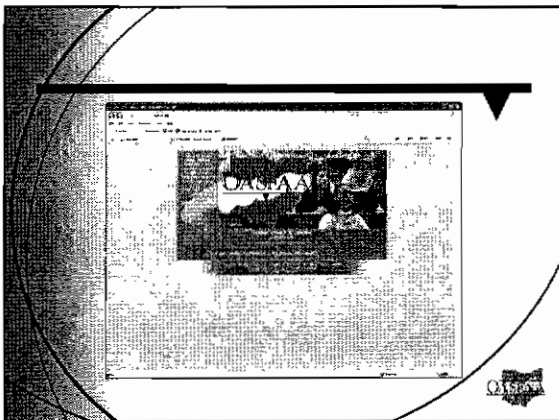
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## 2009 OASFAA Counselor Workshops

Save the date  
Registration begins  
the week of Oct. 12  
[www.oasfaa.org](http://www.oasfaa.org)

- ▼ **Monday - December 7, 2009**  
Xavier
- ▼ **Tuesday - December 8, 2009**  
Belmont Technical College  
Bluffton University
- ▼ **Wednesday - December 9, 2009**  
Hocking College  
Bowling Green State University  
Stark State Technical College
- ▼ **Thursday - December 10, 2009**  
Ashland University  
Baldwin-Wallace College  
Shawnee State University
- ▼ **Friday - December 11, 2009**  
Ohio Dominican University  
University of Dayton



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Questions?

▼ [holzapfel@ohiocan.org](mailto:holzapfel@ohiocan.org)

▼ 614-947-3506

[www.oasfaa.org](http://www.oasfaa.org)



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