

Rural Student Success Initiative



FAFSA: Let's Get Ready to Apply

Arnulfo C. Gonzalez & Natalia M. Hurt
Extension Program Specialists- College Access and Success

TEXAS A&M
AGRILIFE
EXTENSION

2020 Counselor Series

Extension Program Specialists- *College Access and Success*



Arnulfo Gonzalez

south ,west and central
regions



Natalia Hurt

north, east, and central
regions

Special Guests



Samantha Gonzalez

Program Manager
Texas OnCourse



Lisa Shaw

Implementation Coordinator
Texas OnCourse



Why should students apply for Financial Aid?

- ⦿ FAFSA completion is positively associated with college enrollment and increases the likelihood of a student graduating from a postsecondary institution. (Kofoed, 2015; McKinney, 2013)
- ⦿ In 2019, the Texas State Legislature passed House Bill 3 making FAFSA completion a requirement for high school graduation beginning with the 2021-2022 academic year.



HOUSE BILL 3

Objectives



FAFSA UPDATES



FAFSA TIPS AND
RESOURCES



TEXAS ONCOURSE
LEARNING ACADEMY

Friendly Reminder

FAFSA
opens on
October 1st



Application Updates

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Free Application for Federal Student Aid (FAFSA)


- ⦿ Income threshold for an automatic zero Expected Family Contribution (EFC) increased to \$27,000.
- ⦿ IRS Data Retrieval Tool (DRT) will prepopulate answer to question 82: *“Did (or will) your parents file a Schedule 1 with their 2019 tax return?”*
- ⦿ The "Help Topics" for Schedule I updated to include all current exceptions.
- ⦿ Most help topics on tax return forms now have images of the forms with relevant line numbers highlighted

Updated help option w/image

Parent Income from Work

Student Demographics School Selection Dependency Status Parent Demographics Parent Financials Student Financials Sign & Submit Confirmation

PARENT INFORMATION

How much did your Parent 1 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2018? 

This amount is your Parent 1 (father's/mother's/stepparent's) portion of IRS Form 1040-line 1 + Schedule 1 lines 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065).

\$.00

How much did your Parent 2 (father/mother/stepparent) earn from working (wages, salaries, tips, etc.) in 2018?

This amount is your Parent 2 (father's/mother's/stepparent's) portion of IRS Form 1040-line 1 + Schedule 1 lines 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065).

\$

PREVIOUS



SCHEDULE 1 (Form 1040)		Additional Income and Adjustments to Income		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service		▶ Attach to Form 1040. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2018 Attachment Sequence No. 01
Name(s) shown on Form 1040		Your social security number		
Additional Income	1-9b Reserved	1-9b		
10	Taxable refunds, credits, or offsets of state and local income taxes	10		
11	Alimony received	11		
12	Business income or (loss). Attach Schedule C or C-EZ	12		
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ <input type="checkbox"/>	13		
14	Other gains or (losses). Attach Form 4797	14		
15a	Reserved	15b		
16a	Reserved	16b		
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17		
18	Farm income or (loss). Attach Schedule F	18		
19	Unemployment compensation	19		
20a	Reserved	20b		
21	Other income. List type and amount ▶	21		
22	Combine the amounts in the far right column. If you don't have any adjustments to income, enter here and include on Form 1040, line 6. Otherwise, go to line 23	22		
Adjustments to Income	23 Educator expenses	23		
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106	24		
25	Health savings account deduction. Attach Form 8889	25		
26	Moving expenses for members of the Armed Forces. Attach Form 3903	26		
27	Deductible part of self-employment tax. Attach Schedule SE	27		
28	Self-employed SEP, SIMPLE, and qualified plans	28		
29	Self-employed health insurance deduction	29		
30	Penalty on early withdrawal of savings	30		
31a	Alimony paid	31a		
	b Recipient's SSN ▶	31b		
32	IRA deduction	32		
33	Student loan interest deduction	33		
34	Reserved	34		
35	Reserved	35		
36	Add lines 23 through 35	36		

Did (or will) your parents file a Schedule 1 with their 2018 tax return?

This is question 82 on the paper *Free Application for Federal Student Aid (FAFSA®)* form.

Texas Application for State Financial Aid (TASFA)



- ◉ Gradually moving online
- ◉ State is exploring standard online option to meet HB3 financial aid completion requirement
- ◉ Tentative Timeline – aiming for Fall 2021

Virtual FAFSA Events

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Virtual Group Setting: FAFSA Presentation

Virtual FAFSA Presentation

Friday, 5 PM – 6 PM

October 16th

October 23rd



Register Here

Online Application : <https://studentaid.ed.gov/sa/fafsa>

- Virtual Platform
 - Zoom
 - Google Meets
 - Microsoft TEAMS
- Time of Presentations
 - Consider audience
- PowerPoint on FAFSA
 - FSA ID
 - Deadlines
 - Required documents
 - Address Myths
 - Types of aid
- Promote additional session for 1-on-1 assistance

Note: Record virtual parent/student presentations for future on-demand access

Implementation Example: Trenton ISD



- Platform
 - Google Meets
- Time of Presentations
 - 6pm-7pm
- Promotion of Event
 - Email Invites
- FAFSA talking points
 - FSA ID
 - Deadlines
 - Required documents
 - Address Myths
 - Types of aid

Note: Record virtual parent/student presentations for future on-demand access

Promotional Materials




SENIORS FAFSA WORKSHOP


**DATE
LOCATION
TIME**

Come in and meet with a XXXXXXXX XXXXXXXX (Financial Representative/Specialist) from XXXXXXXX XXXXXXXX to receive completing your FAFSA. The representative will be on site to help you through the completion of your FAFSA, help guide you through the problems you have, and answer your questions.

Sign Up Today!

For more information contact XXXXXXXXXX XXXXXXXXXX at XXX-XXX-XXXX.

FSA ID INFORMATION



Student Name: _____


Parent Name: _____

USERNAME (Student)	USERNAME (Parent/Legal Guardian)
PASSWORD (Student)	PASSWORD (Parent/Legal Guardian)
EMAIL (Student)	EMAIL (Parent/Legal Guardian)
PHONE (Student)	PHONE (Parent/Legal Guardian)
CHALLENGE ANSWERS (Student)	CHALLENGE ANSWERS (Parent/Legal Guardian)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.


Instructions for creating an FSA ID can be found at <https://studentaid.gov/sites/default/files/creating-using> or An Instructional Video may be found at <https://studentaid.gov/resources>

Visit <https://studentaid.gov/fsa-id/create-account/launch> to begin



CHECKLIST


DOCUMENTS TO COMPLETE THE 2021-2022 FAFSA



FSA ID


Student and parent/legal guardian (if applicable) will need to create an FSA ID.

To create an FSA ID visit: <https://studentaid.gov/fsa-id/create-account/launch>



Social Security Card


The FAFSA and FSA ID will require the student and parent/legal guardian (if applicable) to enter their Social Security Number AND name EXACTLY how it appears on the Social Security Card.



Tax Information

Students and parent/legal guardians (if applicable) will need to have copies of their 2019 IRS tax return and 2019 W-2 form.


<https://www.irs.gov/individuals/get-transcript>



Other Income

Student and parent/legal guardian (if applicable) will need to know the amount of any untaxed income received during 2019.

Learn more about what qualifies as untaxed income here!



List of Schools

Student should have a list of schools they are interested in attending to ensure all interested schools receive the student's FAFSA.

FAFSA Tips

*The sooner you complete the FAFSA the better!

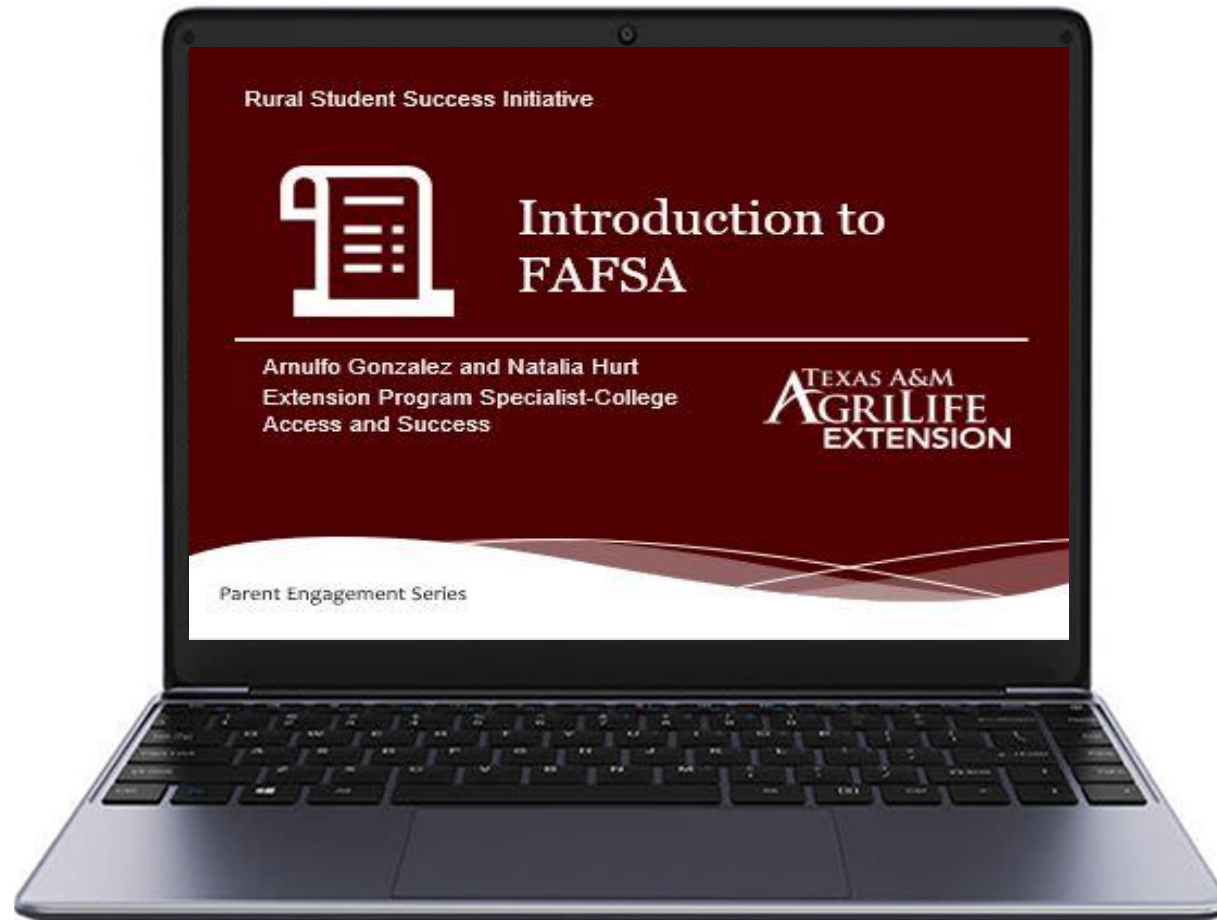
*Using the IRS Data Retrieval Tool is helps reduce the chance of being selected for verification!

What is Untaxed Income?

*Untaxed income includes workers compensation, Black Lung benefits, untaxed railroad retirement benefits, disability benefits, child support, untaxed portions of health savings accounts

studentaid.ed.gov/sa/fafsa

Parent Engagement Presentation



Helpful Handouts

● Office of Federal Student Aid



- <https://fsaid.ed.gov/npas/pub/faq.htm>
- <https://studentaid.gov/apply-for-aid/fafsa/filling-out/dependency>
- <https://studentaid.gov/apply-for-aid/fafsa/filling-out/parent-info>
- <https://studentaid.gov/sites/default/files/financial-aid-myths.pdf>



● Practical Money Skills

https://www.practicalmoneyskills.com/resources/free_materials

Request a Financial Aid Presentation



<https://money.utsa.edu/requests/request-a-financial-aid-presentation-table/>



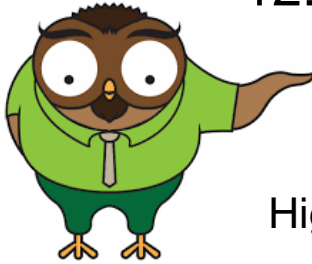
Contact Student Prospective Center

Note: Schools also offer 1-on-1 assistance if requested

Virtual One-on-One Assistance

Virtual FAFSA 1-on-1 Session

Mondays & Wednesdays
12:00 PM – 3:30 PM



High School Counselor [Register Here](#)

- Assist student and parents
- Times vary on campus
- Additional Support
 - College FA Office
 - RSSI Specialist

Online Application : <https://studentaid.ed.gov/sa/fafsa>

Helpful Websites

- **Office of Federal Student Aid**

- <https://studentaid.gov/>



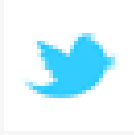
- **College For All Texans**

- <http://www.collegeforalltexas.com/>



- **College/University Financial Aid websites**

Social Media



@FAFSA: Stay updated with the latest information on the *Free Application for Federal Student Aid* (FAFSA®) form and the **federal student aid programs**.



Federal Student Aid: Watch videos about federal student aid. Topics include understanding the financial aid process, applying for aid, borrowing responsibly, repaying your federal student loans, and more.



Federal Student Aid: Stay updated on federal student aid programs and events.



How do I get started?



How do I apply to college?



Is college for me?



Where should I go to college?



Ask ADVi!

- Part of a statewide campaign
- Marketing for your event
- Tips and resources
- Follow on Twitter:
[@askADVi](https://twitter.com/askADVi)

**Text: RSSI
(512)829-3687**

Texas OnCourse

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The Academy and Resources



Texas OnCourse Academy

Samantha Gonzalez

Content and Resources Program Manager



- All Tools
- Texas OnCourse Academy
- MapMyGrad
- MiddleGalaxy
- Share Your Road
- Roadtrip Texas
- Middle School Curriculum Guide
- Middle School Family Guide
- Monthly Webinar Series
- Office Hours Twitter Chat

Your source for college and career preparation

Have a plan for what's next.

[Explore our middle school resources](#)



Texas OnCourse Academy Dashboard

The screenshot displays the Texas OnCourse Academy Dashboard. At the top, the logo "TEXAS ONCOURSE" is on the left, a search bar is in the center, and the user name "Samantha Gonzalez" with a profile icon is on the right. Below the header, there are three tabs: "Academy", "MiddleGalaxy", and "DataDive".

Left Navigation Menu:








- Dashboard
- Explore Modules
- Module Directory
- Where are my badges?
- Support & Feedback
- Web Accessibility
- Glossary

Main Content Area:

- LAST UNIT VISITED:** A card for "FAFSA Preparation" (UNIT 01) with a "CONTINUE" button.
- NEW CONTENT:** A list of new modules with "Explore Module" buttons:
 - ApplyTexas (Added July 13 at 2:00 am)
 - SAT (Added July 13 at 2:00 am)
 - Texas Success Initiative Assessment (TSIA) (Added July 13 at 2:00 am)
- Resource Cards (Left Column):**
 - Financial Aid:** A card with a star icon and a red border.
 - Postsecondary Pathways
 - Specialties
 - Career Pathways
- Resource Cards (Right Column):**
 - TRANSITION ADVISING
 - ADVISING HIGHLY MOBILE POPULATIONS
 - MIDDLE SCHOOL COLLEGE AND CAREER
- VIEW MY BADGES AND CERTIFICATES:** A button at the bottom right.

Financial Aid Content Area

MY PROGRESS

 Financial Aid	 FINANCIAL AID APPLICATION PROCESS	 SCHOLARSHIP APPLICATION PROCESS	 COLLEGE COST
 Postsecondary Pathways	 FINANCIAL AID: FOUNDATIONAL KNOWLEDGE		
Specialties			
 Career Pathways			VIEW MY BADGES AND CERTIFICATES

Financial Aid Content Area

Badges You Can Earn. Modules You Can Complete.

Badge	Module(s)
Financial Aid Foundational Knowledge	<ul style="list-style-type: none">• Basic Principles of Financial Aid
Financial Aid Application Process	<ul style="list-style-type: none">• FAFSA• TASFA• CSS Profile
Scholarship Application Process	<ul style="list-style-type: none">• Scholarship Applications
College Cost	<ul style="list-style-type: none">• College Finances

Financial Aid Application Process

FAFSA Module

Counselors will be able to:

- Explain the eligibility and documentation requirements for federal student aid
- Describe the seven sections of the FAFSA
- Explain how to use the IRS Data Retrieval Tool
- Explain the FAFSA verification process
- Describe best practices and common errors for completing a FAFSA

FAFSA Module

Updates and Learning Resources

- Content updates to reflect current and upcoming application
- New learning resources added:
 - FAFSA Renewal Steps
 - HB3 Financial Aid Requirement
 - Who's My Parent When I Fill Out A Financial Aid Application

DID YOU KNOW
completing a financial aid application
is becoming a graduation requirement?

According to Texas HB 3, beginning with the 2021-22 academic year, graduating seniors will be required to submit and complete either a Free Application for Federal Student Aid (FAFSA), Texas Application for State Financial Aid (TASFA), or receive an exemption through opting out*. Get ahead by implementing the following strategies:

- Create a financial aid completion culture.**
Host annual in-school FAFSA and TASFA completion events. Partner with your local colleges and universities and invite them to support students with completion during these events. 
- Make it known.**
During advising sessions with current sophomores and juniors, discuss the upcoming requirement and what it means for their postsecondary success. Leverage the ApplyTexas Counselor Suite to monitor FAFSA submission for your 12th-grade students during the financial aid application season. 
- Get everyone on campus involved!**
Create action plans with teachers, counselors, advisers, and administrators to integrate the FAFSA/TASFA completion requirement into the classrooms, guidance lessons, and advising sessions. 

*Criteria for one of the exception options defined in the rules must be met to complete the Opt-out form. The Texas Education Agency (TEA) will provide the approved opt-out form in Spring 2021.

For more information and details about the financial aid requirement, explore TEA's HB3 in 30: Financial Aid Application video. 

FAFSA Module

Additional Learning Resources to Support FAFSA Completion

12 Common FAFSA Mistakes

Explore these mistakes to help students avoid them when completing and submitting the FAFSA.

1. Not Completing the FAFSA Form

- There is no income cut-off for federal student aid.
- It's not just federal grants, it's also for Federal Work-Study funds, federal student loans and even scholarships offered by the state, school or private organization.

2. Not Using the Correct Website

- If you're asked to provide credit card information, you're not on the the official government website for the FAFSA (fafsa.ed.gov).

3. Not Filling out the FAFSA Form as Soon as It's Available

- The FAFSA opens October 1st and financial aid is awarded on a first-come, first-served basis; some states and colleges run out of money early.

4. Not Filing the FAFSA Form by the Deadline

- Each state and school sets its own deadline, and some deadlines are very early.
- To be considered for the maximum amount of financial aid, fill out the FAFSA before the earliest deadline.

5. Not Getting an FSA ID Before Filling out the FAFSA

- When you register for an FSA ID, you may need to wait up to three days before you can use it to sign your FAFSA electronically.
- Don't wait; create an FSA ID before filling out the FAFSA to avoid missing any deadlines.

6. Not Using Your FSA ID to Start the FAFSA Form

- Your Social Security number, date of birth, and name must match exactly on your FSA ID and FAFSA. Using your FSA ID to log in ensures that your information will match.

(Homeroom, 2017, Mistakes)

TEXASONCOURSE

8 STRATEGIES TO COMBAT VERIFICATION CHALLENGES

Verification is when a student is selected for a random federal or institutional audit. There are different processes at each college for verification that can create barriers for students seeking financial aid. Explore the 8 strategies below to help combat verification challenges.

- 1** Track students who've completed a FAFSA
- 2** Offer to assist with ordering tax transcripts, if applicable, during financial aid workshops
- 3** Be sure students and family members know how to use the IRS Data Retrieval Tool (DRT)
- 4** Require students to bring their Student Aid Report (SAR) for review during advising sessions
- 5** Track students selected for verification and what documents have been sent for those students
- 6** Keep a record of how colleges notify students regarding verification
- 7** Review students' verification materials before they submit
- 8** Verify receipt of award letters – ask the college about missing documents if an award letter fails to arrive

TEXASONCOURSE

(FCAN, 2018)

Learning Resources

Additional Resources

- ★ **05** UNIT Dual Credit Programs

- ★ **06** UNIT Dual Enrollment Programs

- ★ **07** UNIT International Baccalaureate

- ★ **08** UNIT Comparing College Credit Courses

- ★ **09** UNIT Engaging Students and families in the college

Additional Resources >

References >

The screenshot shows a webpage titled "Additional Resources" with a search bar containing "College Credits - All". Below the search bar is a list of articles, including "Texas Common Course Numbering System | TCNS | Welcome" and "Texas General Education Core Curriculum | THECB". A red arrow points from the "Additional Resources" link in the left sidebar to the top of this page.



Additional FAFSA Resources

Lisa Shaw

Implementation Coordinator

A person with a backpack is seen from behind, looking out over a valley with mountains in the distance. The scene is overlaid with a blue tint. The person is wearing a plaid shirt and a tan backpack. The background shows a dirt path leading through a valley with green vegetation and mountains in the distance.

With Texas OnCourse, all high school graduates, no matter where they come from or where they're headed, have a plan for what's next.

Join Our Email List

Monthly subscription emails or general news and info

- The Educator Playbook
- The College and Career Strategist

Register at texasoncourse.org/newsletter-sign-up

Find all our infographics on Pinterest

<https://www.pinterest.com/texasoncourse/>



Texas OnCourse

1.7k monthly viewers

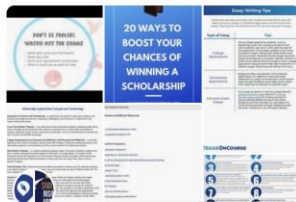
185 Following

texasoncourse.org

With Texas OnCourse, every high school graduate, no matter where they come from or where they're headed, has a plan for what's next

Overview **Boards** Pins Followers Following

23 Boards



Scholarship Appl...

2 sections
15 Pins

Following



ApplyTexas

2 sections
13 Pins

Following



Advising Highly ...

2 sections
16 Pins

Following



National Merit Sc...

2 sections
17 Pins

Following



Transition Servic...

2 sections
38 Pins

Follow ?

Privacy

Find our videos and webinars on YouTube.com

<https://www.youtube.com/texasoncourse/>

The screenshot shows the YouTube channel page for Texas OnCourse. At the top, there is a navigation bar with the YouTube logo, a search bar, and a 'SIGN IN' button. Below this is a large banner image of a road in a desert landscape. The channel name 'Texas OnCourse' is displayed with a profile picture icon and '268 subscribers'. A red 'SUBSCRIBE' button is located to the right. Below the channel name are navigation tabs for 'HOME', 'VIDEOS', 'PLAYLISTS', 'CHANNELS', 'DISCUSSION', and 'ABOUT'. The 'VIDEOS' tab is selected. Underneath, there is an 'Uploads' section with a 'PLAY ALL' button. Five video thumbnails are shown, each with a title and duration: 'Adjusting to College Planning Under COVID-19' (58:03), 'Navigating Social Justice Issues in College and Career Advisin' (57:28), 'Discussion: Gearing Up for Back to School during COVID-19' (58:14), 'ApplyTexas High School Counselor Portal Tutorial' (4:38), and 'NCAA/NAIA RESOURCES AND GUIDELINES' (1:00:35).

Follow Us on Social

- Facebook: facebook.com/texasoncourse
 - Join “The Texas College & Career Planning Source”
- Twitter: @TexasOnCourse
- Instagram: @TexasOnCourse
We're on Pinterest, LinkedIn, and YouTube too!

Closing remarks

- ◉ With the HB3 FAFSA requirement beginning next academic year, we will continue to share the latest information and tools for helping you improve your school district's FAFSA completion rate.

- ◉ Next RSSI Webinar coming up soon!

Wednesday, September 30, 2020 @ 9a.m.

Topic: Discovering Students' Post High School Intent

The Post-High school intent discussion activity will help you gain a deeper understanding about students' aspirations for when they graduate from high school.



Discussion