

Operational Update and Program News

December 21, 2022



Agenda

- ISAC Operational and Program Update
- ISAC Program Questions and Answers
- FAFSA Simplification 23-24
- FSA Conference Overview



2022-23 Fall Term Claim Deadline Dates

Program	Submit On or Before
Monetary Award Program (MAP)	12/09/22
Illinois National Guard (ING) Grant	12/30/22
Illinois Veteran Grant (IVG)	12/30/22
Minority Teachers of Illinois (MTI) Scholarship	12/30/22
Golden Apple (GA) Scholars of Illinois Program	12/30/22
Early Childhood Access Consortium for Equity (ECACE) Scholarship	12/30/22

 For more details on payment processing on each program, see their respective pages in the Gift Assistance area of the FAA section at isac.org





2022-23 MAP Updates

- ISAC is now accepting MAP claims for the second (spring) term
- In addition, claims for the fall term will continue to be accepted and results for first-term claims that were being held are now available in the MAP system
- Claims for first and second terms are due on or before
 Friday, March 10, 2023
- For second term, accepting:
 - o initial claims
 - increases to previously-submitted claims
- For first term, accepting:
 - o initial claims
 - o increases to previously-submitted claims, and
 - o late claims (i.e., claims submitted after December 9, 2022)



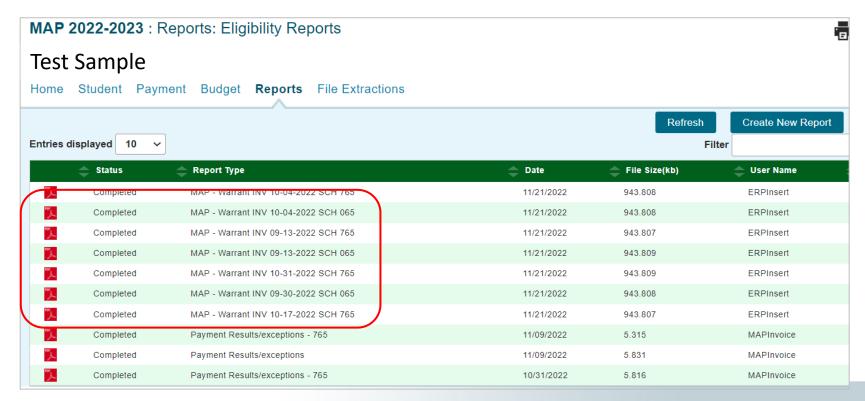
2022-23 MAP Updates

- Colleges are encouraged to submit all first- and second-term claims as soon as possible, keeping in mind that claims may be submitted no more than 10 days prior to the start of classes for the term for which they being requested, per ISAC rules
 - n) MAP grants are paid directly to the approved institution of record that certifies to ISAC that the applicant is an eligible recipient.
 - 1) ISAC will annually establish priority claim dates for the submission of payment requests and inform schools of the required priority dates.
 - 2) Late payment requests will result in delayed processing of payments. Payment requests are processed in the sequence of receipt by ISAC and as funds are available.
 - 3) Institutions may submit their payment requests beginning 10 days prior to the start of classes for the term for which they are requesting payment.
- No suspension of 2022-23 MAP award announcements is scheduled at this time
 - ISAC will continue to monitor claim volume and appropriation levels and will notify the financial aid community should 2022-23 MAP award announcements need to be suspended in the future
- See today's e-message for more information



GAP Access - Payment Vouchers

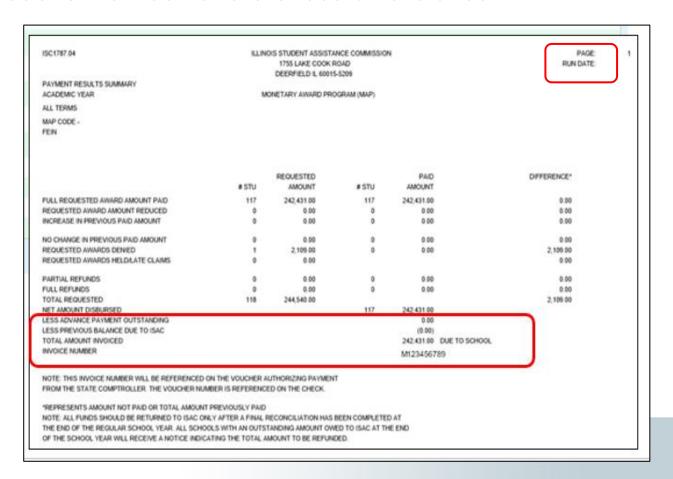
- ISAC is now providing another report in GAP Access through which payment voucher and warrant information will be available for the MAP, MTI, GA and ECACE programs
 - Colleges can access these in their Reports section
 - They can be identified by the red PDF icon, which is an indicator that the report was generated by ISAC





Payment Results/Exceptions Report

- The last page of this report provides invoice information, including amount due to the school and thse invoice number.
- This invoice number will be referenced on the voucher authorizing payment from the State Comptroller.
- The voucher number is referenced on the check.





Sample Report



FY2023

MAP PROGRAM INVOICE - VOUCHER

Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015-5209 800.899.ISAC (4722) Website: www.isac.org

VENDOR DETAILS

Vendor or Payee

UNIVERSITY OF SOME SCHOOL FINANCIAL AID OFFICE 123 ANY STREET SOME TOWN, IL 60001

Voucher Information

 VOUCHER NO.
 23822433

 VOUCHER DATE
 11-14-2022

 INVOICE NO.
 M233130956

 INVOICE DATE
 11-14-2022

WARRANT NO.
WARRANT DATE

Warrant number is populated when the Illinois Office of Comptroller authorizes payment for this voucher. The status of payment requests can be monitored on the Comptroller's website.

VOUCHER DETAILS TOTAL AMOUNT

Monetary Award Program (MAP) UNIVERSITY OF SOME SCHOOL 123456 (123) 2022-2023 ACADEMIC YEAR

\$27,026.00



Sample Report



FY2023

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Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015-5209 800.899.ISAC (4722) Website: www.isac.org

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 VOUCHER DATE
 11-14-2022

 INVOICE NO.
 M233130956

 INVOICE DATE
 11-14-2022

WARRANT NO. 000000013631 WARRANT DATE 11-22-2022

Warrant number is populated when the Illinois Office of Comptroller authorizes payment for this voucher. The status of payment requests can be monitored on the <u>Comptroller's website</u>.

VOUCHER DETAILS TOTAL AMOUNT

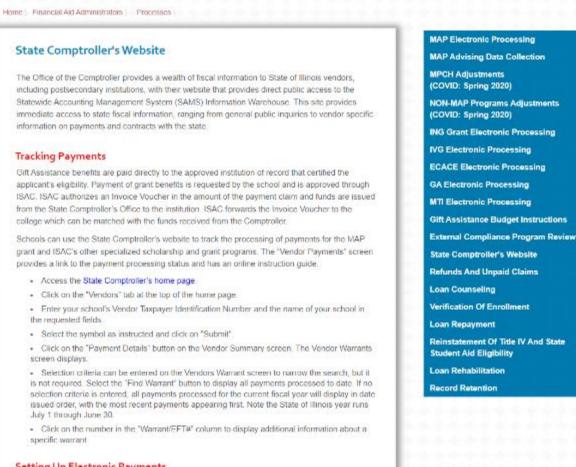
Monetary Award Program (MAP) UNIVERSITY OF SOME SCHOOL 123456 (123) 2022-2023 ACADEMIC YEAR

\$27,026.00



Tracking ISAC Payments from the State Comptroller

• <u>isac.org/faas/processes/state-comptrollers-website</u>





In addition to providing access to state fiscal information, schools may receive electronic payments

Tracking ISAC Payments from the State Comptroller

- ISAC authorizes an Invoice Voucher in the amount of the payment claim and funds are issued from the State Comptroller's Office to the institution.
- ISAC provides an Invoice Voucher number to the college which can be matched with the funds received from the Comptroller.
- Schools can use the State Comptroller's website to track the processing of payments for the ISAC programs.
- The "Vendor Payments" screen provides a link to the payment processing status and has an online instruction guide.

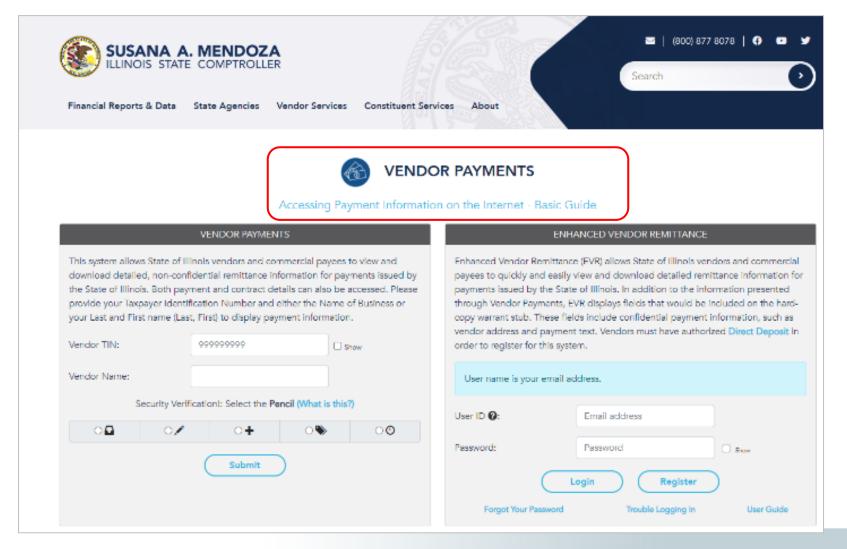


Tracking ISAC Payments from the State Comptroller

- Access the <u>State Comptroller's home page</u>.
- Click on the "Vendors" tab at the top of the home page.
- Enter your school's Vendor Taxpayer Identification Number and the name of your school in the requested fields.
- Select the symbol as instructed and click on "Submit".
- Click on the "Payment Details" button on the Vendor Summary screen. The Vendor Warrants screen displays.
- Selection criteria can be entered on the Vendors Warrant screen to narrow the search, but it is not required. Select the "Find Warrant" button to display all payments processed to date.
 - If no selection criteria is entered, all payments processed for the current fiscal year will display in date issued order, with the most recent payments appearing first. Note the State of Illinois year runs July 1 through June 30.
- Click on the number in the "Warrant/EFT#" column to display additional information about a specific warrant.



illinoiscomptroller.gov/vendorservices/vendor-payments-new





Other 2022-23 Programs

- ISAC is working to implement a few new programs throughout 2022-23
 - o Administrative rules will be made available as they are proposed and approved
 - Web pages will be added to the Student and FAA sections of isac.org to provide information as it becomes available, and updates will be provided via e-messaging

Community Behavioral Health Care Professional Loan Repayment Program

- Administered by ISAC with funding from the Department of Human Services
- This will be the first year the program receives funding (was enacted in 2016)

Nursing Education Scholarship Program

- Appropriation increased from \$2 million to \$4 million
- Is being transitioned from the Illinois Department of Public Health to ISAC during FY23

Post-MSW School Social Work PEL Scholarship Program & School Social Work & Municipal Loan Repayment Program

- A \$6 million appropriation will be split between these two programs
- Applications are being developed; will be available in early 2023

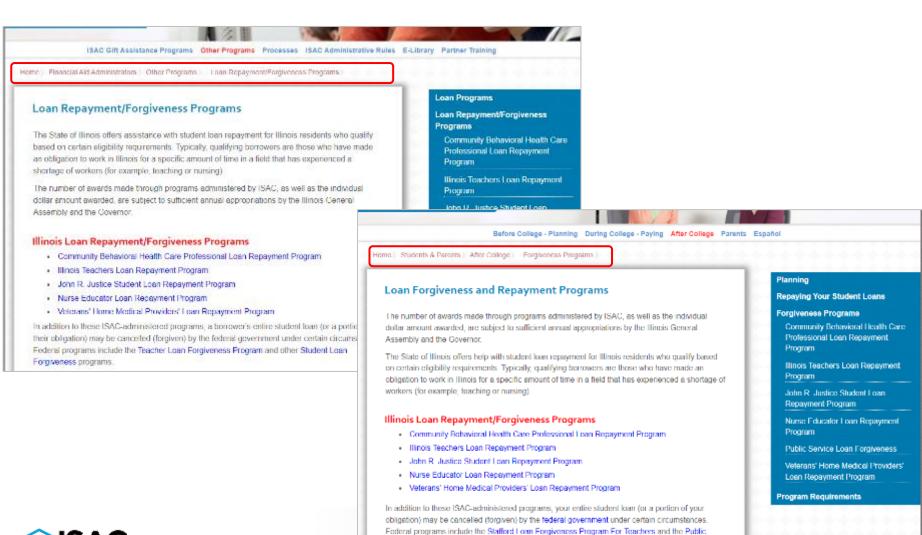
Displaced Energy Worker Dependent Transition Scholarship

- Created last year under Public Act <u>102-0662</u>
- Will be administered by ISAC with funding from the Department of Commerce and Economic Opportunity (DCEO)
- Application will be available in early 2023



Loan Repayment Programs

<u>isac.org/faas/other-programs/loan-repaymentforgiveness-programs/isac.org/students/after-college/forgiveness-programs/</u>



Service Loan Forgiveness Program (PSLF) (for Federal Direct loan borrowers). If you work or have worked in public service, recent temporary changes to PSLF could be beneficial to you. Because these changes are temporary, it's important that you do not delay in getting the information you need



ISAC Gift Assistance Programs Other Programs Processes ISAC Administrative Rules E-Library Partner Training

Home | Financial Aid Administrators | Other Programs | Loan Repayment/Forgiveness Programs |

Community Behavioral Health Care Professional Loan Repayment Program

(last updated August 12, 2022)

The number of awards made through this program, as well as the individual dollar amount awarded, are subject to sufficient annual appropriations by the Illinois General Assembly and the Governor.

Program News

Program Overview

Eligibility Requirements

Application Procedure

Award Determination and Payment

Program News

Fiscal Year 2023

The 2023 fiscal year (July 1, 2022-June 30, 2023) appropriation for the Community Behavioral

Health Care Professional Loan Repayment Program is \$5,000,000.

The FY23 Community Behavioral Health Care Professional Loan Repa accepted. In order to be considered timely, the 2022-23 Community Be Professional Loan Repayment Program application must be submitted.

2022, which is the priority consideration date.

Program Overview

(ISAC Rules, Part 2753)

The Community Behavioral Health Care Professional Loan Repaymen repayment assistance to qualified mental health and substance use pr

<u>isac.org/e-</u> <u>library/administrative-</u> <u>rules/index.html</u>



Loan Programs

Loan Repayment/Forgiveness Programs

Community Behavioral Health Care Professional Loan Repayment Program

Illinois Teachers Loan Repayment Program

John R. Justice Student Loan Repayment Program

Nurse Educator Loan Repayment Program

Veterans' Home Medical Providers' Loan Repayment Program

College Illinois!®

Other State-Sponsored Programs

<u>isac.org/faas/other-</u> <u>programs/loan-</u> <u>repaymentforgiveness-</u> programs/cbhcp.html

2022-23 ISAC Rules

Home) E-Library) Administrative Rules

Select order in which to view the 2022-23 ISAC Rules:

Listed Alphabetically Listed by Program Type/Topic

2022-23 ISAC Rules - Listed Alphabetically

- Administrative Wage Garnishment [Part 2722]
- Adult Vocational Community College Scholarship Program [Part 2745]
- AIM HIGH Grant Pilot Program [Part 2766]
- Alternative Loan Program [Part 2721]
- Americans With Disabilities Act Grievance Procedure [Part 1400]
- Child Welfare Student Loan Forgiveness Program [Part 2769]
- College Planning Act [Part 2774]
- College Savings Bond Bonus Incentive Grant (BIG) Program [Part 2771]
- Community Behavioral Health Care Professional Loan Repayment Program [Part 2753]
- Community College Transfer Grant (CCTG) Program [Part 2740]
- Displaced Energy Worker Dependent Transition Scholarship Program [Part 2746]
- Federal Family Education Loan Program (FFELP) [Part 2720]
- General Provisions [Part 2700]

Proposed Rules And Amendments (IVG, Social Work Loan Repmt., Human Services Loan Repmt.)

Proposed Rules And Amendments (General Provisions, MAP, Social Work Scholarship)

2022-23 ISAC Rules

2021-22 ISAC Rules

2020-21 ISAC Rules

2019-20 ISAC Rules

2018-19 ISAC Rules

2017-18 ISAC Rules

2016-17 ISAC Rules

2015-16 ISAC Rules

2010-10101101101

2014-15 ISAC Rules 2013-14 ISAC Rules

2012-13 ISAC Rules

2011-12 ISAC Rules

2010-11 ISAC Rules

2022-23 NESP Awarding: What Has Happened So Far

- Applicants received notification of their eligibility status from the IDPH earlier in the year
 - Recipients should refer to the awarding statement received from IDPH for award details, including the award amount
- IDPH and ISAC have worked in partnership to build the needed systems to transfer required documentation and integrate program administration into ISAC processing
 - Unfortunately, this has resulted in a delay obtaining signed grant agreements from recipients and disbursing funds
- In late November, NESP recipients were sent an e-mail message from ISAC containing information about the transition of the program to ISAC, along with next steps and the expected timeline for disbursements
- In early December, NESP recipients received e-mailfrom ISAC which contained instructions for signing and submitting the required Grant Agreements/Promissory Notes.
 - Disbursement of NESP funds cannot occur until a recipient's signed Grant Agreement/Promissory Note is in place
 - Recipients may access and sign agreements through the Program Applications & Status Checks area of the <u>ISAC Student Portal</u> at <u>studentportal.isac.org</u>





What's Next for NESP ...

2022-23

- · As agreements are signed, disbursement of fall term awards will begin
- Stipends and scholarships are expected to be disbursed after the new year
- Spring and summer term processing will utilize ISAC's Gift Assistance Portal -- Access, where schools will certify eligibility and request subsequent term payments
 - Similarly to how processing works for other ISAC programs

2023-24

- The application process will be made available in ISAC's Student Portal
- Program administration for 2023-24 and beyond will take place in ISAC's GAP Access system

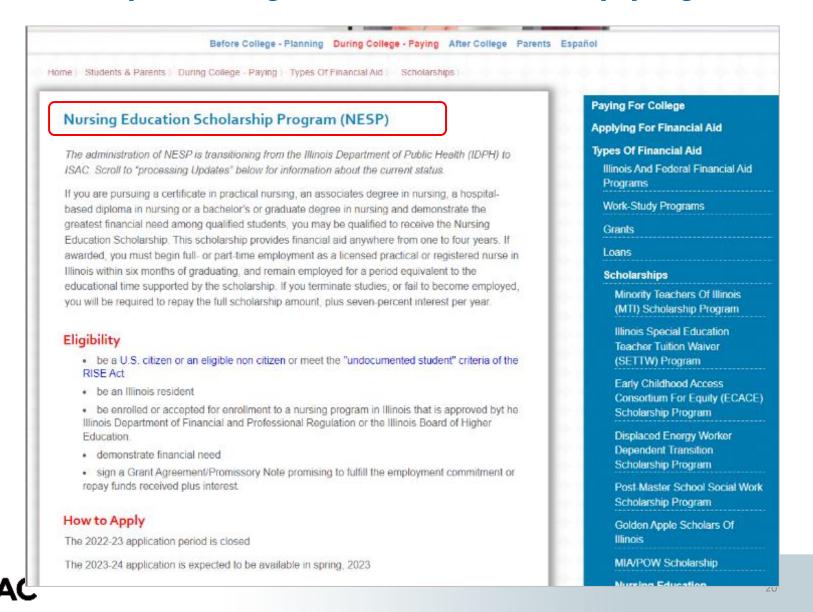


NESP Student Communication

- Students have been provided with ISAC's contact information and have been reaching out to ISAC's Call Center regarding their fall payments
- As we explain the transition process to them, we're letting them know we've provided communication to NESP-participating schools about the delay in payment processing
- We are also encouraging students to contact the financial aid and/or business office to discuss any issues/concerns regarding their ability to graduate or enroll for the spring term, as well as possible contingencies that schools may have in place for these types of situation where financial aid funding has been delayed
- Student information page:
 - www.isac.org/students/during-college/types-of-financialaid/scholarships/nursing-education-scholarship-program.html



<u>isac.org/students/during-college/types-of-financial-aid/scholarships/nursing-education-scholarship-program.html</u>



<u>isac.org/e-library/partner-e-messages-and-newsletters/faa-e-messages/eLibrary-faa-2022-1208.html</u>

2023 - What's Ahead

As we look ahead to 2023, there is much work to be done on behalf of NESP recipients and participating schools. ISAC is preparing to undertake three major activities starting in January 2023: the spring term awarding cycle, the onboarding of this program into our Gift Assistance Programs (GAP) Access portal to accommodate schools' administration of the program, and the development of the 2023-24 application. You will receive more details and updates on these activities early next year.

In the meantime, we appreciate your support and collaboration as we continue to work through the details of the transition.

You are receiving this message because you registered for ISAC's e-Messaging service through one or more subscription groups for FAAs.

If you have any questions regarding this e-Message, please contact ISAC's School Services Department by calling toll free at 866.247.2172 or sending an e-mail message to isac.schoolservices@illinois.gov.



www.isac.org/emessaging/emsg-cc-faas.html



e-Messaging Sign-Up Our e-Messaging service will keep you informed and up-to-date on the Illinois Student Assistance Commission's programs and services. Although Constant Contact is the provider for the e-Messaging service, our messages share ISAC programmatic and operational information and are not marketing in nature. From the options below, choose the category that best describes you, and then subscribe to one or more of the available Email Lists by filling out your name and e-mail address and clicking on "Sign Up!". Counselors Students/Parents Financial Aid Administrators (FAAs)

Financial Aid Administrators (FAAs) e-Messaging Please fill in the required details and select the Email List(s) to which you would like to subscribe by marking the boxes below. *indicates required field * Email * First Name * Last Name **Email Lists** Business Officer - fiscal updates College Coursework Materials Task Force - announcements & information about the work of the Task Force ECACE Administrators - program & processing updates about the Early Childhood Access Consortium for Equity Scholarship Program FAA ISAC Update - monthly newsletter summarizing each month's announcements and updates Financial Aid Administrators - program & processing updates, rules & regulations, operational announcements Financial Aid Directors - administrative announcements MAP Users - operational updates for the Internet application used to process MAP data NESP Schools – operational announcements for schools participating in the Nursing Education Scholarship Program Public Schools - operational announcements for colleges participating in the INC Crent and IVC pregrams



Early Childhood Access Consortium for Equity (ECACE) Scholarship Program Question and Answers



Q. If a school credits a student's account with their ECACE scholarship before receiving the funding from the state, and then the student withdraws or drops classes after the add/drop date, can the student keep the scholarship, or do the funds have to be returned?

A. The student could retain the scholarship funds to cover costs incurred. Although ECACE funds are not subject to Return of Title IV guidelines, students would not be eligible to receive funds for cost of attendance components they may no longer have as a result of their withdrawal from classes.

The intent of the scholarship is to provide the financial assistance students need to pursue a degree or credentials without having to incur or be left with debt as they work toward meeting their educational goals, and the scholarship may be used to ensure that doesn't occur, even for students who may not complete a term.



Q. Are schools required to disburse the balance of ECACE (after direct costs) to a student before we are paid?

A. No, there are no specific requirements or timelines that schools must follow in their process for disbursing funds to student. However, schools are encouraged to provide funds to students in a timely manner, so they have access to the resources they need to be successful.

Schools may disburse credit balances resulting from ECACE funding in a manner that is consistent with a school's usual policies for disbursing aid to students after add/drop dates, withdrawal dates, and/or census dates.



Q. In situations where a student's federal student aid is subject to Return of Title IV requirements due to dropping or withdrawing from classes, can ECACE be adjusted to cover costs which may no longer be covered by Title IV aid?

A. Yes, ECACE funds could be used to pay a balance that a student may have as the result of R2T4 and the impact it may have had on other financial aid.

Q. If a student was not enrolled or not eligible for the fall term, what happens with their ECACE scholarship as a result? Can they enroll for subsequent terms?

A. Yes, if a student is certified as ineligible by your college for the fall term, the scholarship will still be available to the student for subsequent terms. The scholarship will be held for the full academic year.

Remember to frequently check your "Student List Eligibility: View" screen for recently prequalified students, as well as students who may have enrolled for a subsequent term or who may have established eligibility since they originally applied.



Q. What does it mean that the ECACE Scholarship can be used to cover up to cost of attendance?

A. The ECACE Scholarship:

- Is intended to be last payer, after all other aid has been provided
- May be used to replace student loans that might otherwise be part of a student's aid package

Some things to keep in mind when awarding ECACE:

- If you calculate from "cost of attendance" instead of "direct cost," the student would not need to take out any loans, which is the intent of the program
- You can refund the student any remaining funds after direct costs have been covered
 - In some cases, the student refund may be a significant amount based on their cost of attendance components, and that is acceptable



Illinois Veteran Grant (IVG) & Illinois National Guard (ING) Grant Questions and Answers



Q. Does a veteran's characterization of service have to be honorable for all periods of federal active duty service to qualify for IVG?

A. No, an amendment was made in Illinois statute (<u>Public Act 102-0800</u>) to align IVG with other state programs in regard to program eligibility.

IVG had required that a veteran have an honorable discharge from every period of military service, however, the program will now only require evaluation of an applicant's most recent discharge to determine eligibility based on characterization of service

This is intended to benefit veterans whose discharge may have been characterized as something besides "honorable" (like a general discharge under honorable conditions or an early separation before completing basic training) who later decide to re-enlist and serve honorably

The Public Act went into effect in May 2022, IVG rule amendments are being made, and we are processing applications based on the change for 2022-23.



- Q. A student is using ING at our school for Fall 2022. Our fall term dates are 8/22/22 to 12/16/22, however GAP Access indicates he does not become eligible until 8/31/22. How do I determine the amount of tuition and mandatory fees that can be billed for this student?
- **A.** You will need to determine the cost per day and the number of days in the term that the student is eligible for, and then calculate the prorated benefit amount. Here is the reference from the <u>ING Grant rules</u> about prorating benefits:

From Section 2730.30 Program Procedures --

Except as otherwise provided in this Part, if a recipient ceases to be an active status member of the Illinois National Guard during a term, benefits cease, and the student is responsible for the unpaid costs attributed to the remainder of the term. If an applicant becomes eligible during a term, in accordance with Section 2730.20(b), benefits will be prorated for that portion of the term for which the applicant is eligible, provided the application is submitted by the deadlines. Costs are prorated on the basis of the institution's scheduled days of instruction minus institutionally scheduled holidays and examination periods.

• Calculation: Total tuition cost divided by total instructional days = cost per day x days of eligibility = total proration.



Example on how to determine the benefit amount the student is eligible to receive since he became eligible for ING after the term started...

Calculation:

Total tuition cost divided by total instructional days = cost per day x days of eligibility = total proration.

- Term dates: 8/22/22 to 12/16/22
- Student eligible on 8/31
- Holidays: 9/5, 11/8, 11/23, 11/24-11/27
 - > MATH 8/22/22 to 12/16/22
 - o 51 class sessions − 3 holidays = 48 class sessions
 - \$700.00 / 48 = \$14.5833 \$14.58 x 44 eligible class sessions = \$641.67
 - > ECONO 8/22/22 to 12/16/22
 - 117 days 5 holidays = 112 class sessions
 - \$420.00 / 112 = \$3.75
 \$3.75 x 103 eligible class sessions = \$386.25
 - > PHILO 8/23/22 to 12/16/22
 - 34 class session 2 holidays = 32 class sessions
 - \$420.00 / 32 = \$13.125 \$13.125 x 29 eligible class sessions = \$380.63



Minority Teachers of Illinois (MTI) Scholarship Program



- Q. If a student has indicated on their MTI application that they meet the bilingual criteria, but we do not have documentation to confirm that, can we still certify them as eligible.
- **A.** Yes, you could still certify the student as eligible for MTI and bypass the bilingual section by answering "no" to the question: "Is the student bilingual?" to complete the certification process so that the student can be certified and considered eligible for MTI without the bilingual information.

Then, once you have the information you need to confirm the bilingual eligibility criteria, you can make the adjustment to the student record.



Q. A student has been awarded funds for both MTI and Golden Apple. Can the student receive both?

A. No, a student can only receive either MTI or Golden Apple in one award year, and schools are encouraged to work closely with students who have been awarded both programs in GAP Access to determine which one the student wants to accept.

ISAC will send a letter to a student who has been awarded both, asking them to select which fund they would like to receive and return the letter to ISAC. There is a deadline date on these letters, and if the student brings the letter to the school, the school should forward it to School Services. If a school is not sure which program the student would like to accept, the school should contact the student to get a written statement and confirm which program they would like to receive. The statement should be forwarded to School Services and a copy saved for their records.

The school should make sure that payment is not requested for both programs in GAP Access. If that does occur, one must be cancelled.



Q. What are the student obligations for Golden Apple and MTI?

A. Both have teaching obligations.

Golden Apple is a five-year commitment of teaching on a full-time basis.

MTI has a one-year teaching commitment for each year that the scholarship is received.

Both obligations will convert to a loan that the student will need to repay if the commitment is not met.



Monetary Award Program (MAP) Questions and Answers



Q. Are there restrictions on the programs or courses that MAP can be used to pay?

A. The MAP grant cannot pay for:

- academic programs intended to prepare a student for the high school equivalency certificate or for a high school diploma
- audit courses
- credit-by-examination and/or life experience
- graduate-level courses leading to a degree above the baccalaureate level
- noncredit course offerings (except qualifying remedial courses).

Remedial courses are eligible for MAP payment provided the student has been accepted into an eligible degree/certificate program and is taking the remedial courses as part of that program. Payment cannot be made for more than the equivalent of one year of remedial course work (i.e., 30 semester hours or 45 quarter hours).



Q. What is an audit course?

A. Auditing college courses is when a student regularly attends a class without receiving a grade or credit for it.

Q. If a student qualifies for Fresh Start, can they be eligible for MAP?

A. Yes, provided they meet all other MAP eligibility criteria. And the same would be true for all other ISAC programs, including the ECACE program.

Schools are expected to collect and maintain the required documentation according to the guidance provided by the Department of Education in their communication to schools about the Fresh Start program, including the DCL-GEN-22-13 published on August 17, 2022

 https://fsapartners.ed.gov/knowledge-center/library/dear-colleagueletters/2022-08-17/federal-student-aid-eligibility-borrowers-defaultedloans



Q. Is there a limit on the number of certificate programs that a student could use MAP benefits for?

A. No, there is no limit, as long as the student has not exceeded their maximum limit of 135 MAP Paid Credit Hours (MPCHs).

Q. Does a certificate program have to have a minimum number of hours in order to be eligible for MAP?

A. ISAC does not define the number of hours a short-term program must have, however, to be MAP-eligible, a student must be enrolled in a minimum of three credit hours.



Q. Where do I find the User Guides for ISAC programs?

 The list of User Guides can be found on the GAP Access general information page, using this link: https://www.isac.org/gap-access/

Q. Where do I find the Administrative Rules for ISAC Programs?

 The rules can be found in the E-library using this link: https://www.isac.org/e-library/

Q. Where do I find information about ISAC Gift Assistance Programs?

 Additional information regarding ISAC programs can be found on this link: https://www.isac.org/isac-gift-assistance-programs/index.html



FAFSA Simplification 2023-24



FAFSA® Simplification Act Changes for Implementation in 2023-24

- Detailed guidance was provided in <u>Dear Colleague Letter (DCL) GEN-22-15</u>, issued on November 4, 2022
 - <u>fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2022-11-03/fafsar-simplification-act-changes-implementation-2023-24</u>
- Topics covered include:
 - Cost of Attendance
 - What changed and what remained the same
 - Definitions
 - Updated definitions of commonly used COA terms
 - Special Populations
 - Confined or incarcerated students COA
 - Professional Judgement
 - Special Circumstances-Unusual Circumstances
 - Unaccompanied Homeless Youth
 - Pell Grant LEU Restoration
 - Pell Grant Eligibility for Incarcerated Students
 - Changes to the FAFSA form
 - Q & A section



Cost of Attendance (COA) for 2023-24

- Costs for rental or purchase of equipment, materials or supplies has moved out of Tuition and Fees to books, course materials, supplies and equipment
- Transportation may include transportation between campus, residences and a students place of work
- Room and Board are now known as Food and Housing and grouped as living expenses
- Living expenses are broken out as on or off campus and with or without meal plan
- Loan Fees for non-Federal student loans can no longer be included
- Course materials and cost of obtaining a license, certification or first professional credential is an expense that may now be included in the COA for confined or incarcerated individuals



Definitions COA terms

- The definitions of terms commonly used in determining COA can be found in Dear Colleague letter GEN 22-15
 - https://fsapartners.ed.gov/knowledge-center/library/dear-colleagueletters/2022-11-03/fafsar-simplification-act-changes-implementation-2023-24
- Consumer information requirements explicitly states that an institution must make COA information publicly available on its website.
- The information must include a list of all COA elements and must appear on any portion of the website that describes tuition and fees.



Professional Judgement 2023-24

- Special Circumstances refer to the financial situations (loss of a job, etc.) that justify an aid administrator adjusting data elements in the COA or in the EFC calculation.
- Unusual Circumstances refer to the conditions that justify an aid administrator making an adjustment to a student's dependency status based on a unique situation (e.g., human trafficking, refugee or asylee status, parental abandonment, incarceration), more commonly referred to as a dependency override.
- Institutions can not maintain a policy of denying professional judgement requests
- Institutions must disclose publicly that students can request an adjustment based on special or unusual circumstances
- Institutions can use a dependency override determination from another school in the same or prior year



Pell Lifetime Eligibility Used (LEU)

- Allows for restoration of Lifetime Eligibility Used (LEU) regarding loan discharges due to closed schools, false certifications, identity theft and successful borrower defense claims
- Institutions do not have to take any actions.
 - LEU restoration will be an automated process within the Department of Education systems.
 - They will notify students who this will affect once the changes are made.



Pell for Incarcerated Students 2023-24

- Establishes Pell Grant eligibility for confined or incarcerated students
- Some operational guidance can be found in Dear Colleague Letter Gen-22-09:
 - https://fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2022-07-08/2023-2024-award-year-fafsa-information-be-verified-and-acceptabledocumentation
- Final regulations were published on October 28, 2022 and go into effect on July 1, 2023
 - https://fsapartners.ed.gov/knowledge-center/library/federal-registers/2022-10-28/final-regulations-pell-grants-prison-education-programs-determining-amountfederal-education-assistance-funds-received-institutions-higher-education-9010change-ownership-and-change-control



Federal Student Aid (FSA) Conference Hot Topics



PEP (Prison Education Program)

- FAFSA for Incarcerated Students
- Verification for V1 is waived for confined or incarcerated students
- A school offering a PEP must be a public, nonprofit or vocational institution
- The cost of attendance (COA) for an incarcerated student is limited to tuition, fees, books, course materials, supplies, equipment, and cost of obtaining a license, certification or first professional credential
- For a confined or incarcerated individual Pell cannot exceed the COA; if Pell exceeds the COA, it must be reduced as to not result in a credit balance
- If Pell funds are combined with other financial assistance the other financial assistance must be reduced to not exceed COA
- If the other financial assistance cannot be reduced, then Pell must be reduced



FAFSA® Simplification Act Changes for Implementation in 2024-25

- New process for handling Federal Tax Information (FTI), information will be transferred directly to the FAFSA from the IRS using the Direct Data Exchange (DDX).
- The student and/or parent will need to authorize on the FAFSA to use the DDX
 - See breakout session B09 from FSA Conference for more information regarding the use of Federal Tax Information--
 - https://fsaconferences.ed.gov/conferences/library/2022/ppts/2022FS AConfSessionBO9.pdf
- With this change, the rules for protection of student's information prohibits the sharing of information to another entity without the explicit written consent of the applicant



FAFSA® Simplification Act Changes for Implementation in 2024-25

- Replacement of Expected Family Contribution (EFC) with Student Aid Index (SAI)
- The SAI is divided into three formulas:
 - Formula A, for dependent students
 - Formula B, for independent students without dependents other than spouse
 - o Formula C, for independent students with dependents other than spouse
- Student Aid index can be -1500 (rather than 0 under EFC)
- There is no longer an Auto Zero or Simplified Needs Formula
- The ISIR will include the SAI, Intermediate values, Maximum Pell Indicator and Minimum Pell indicator
- This information and more can be viewed or downloaded from the FSA Conference site, BO15 session
 - https://fsaconferences.ed.gov/conferences/library/2022/ppts/2022FSAConfSes sionBO15.pdf

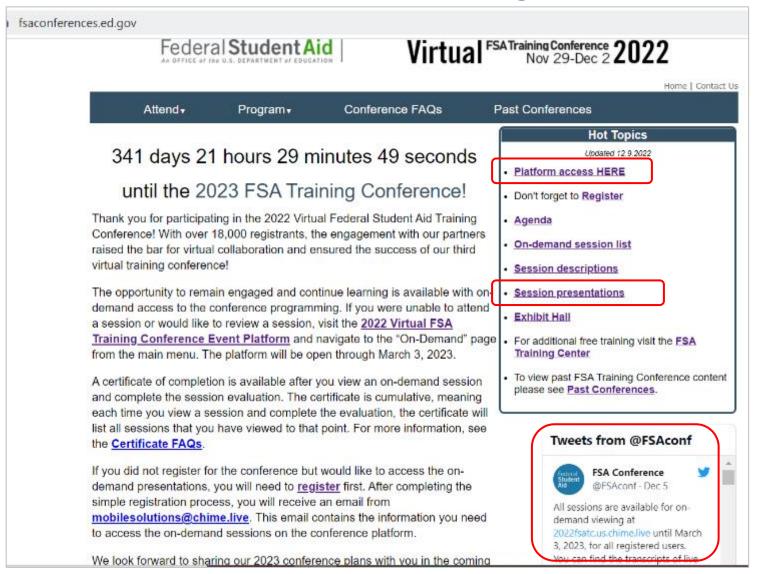


FAFSA® Simplification Act Changes for Implementation in 2024-25

- Work-study will be reported in COD by schools and will be transferred into a students FAFSA during the DDX process.
- This information will be reported for a calendar year and not a academic year
- More information will be forthcoming



fsaconferences.ed.gov/





Session Presentations

General Sessions

- Welcome and Opening Remarks
 Presented by FSA COO Richard Cordray.
- 2. Keynote Address by the U.S. Department of Education Sed
- 3. Keynote by the U.S. Under Secretary of Education Presented by James Kvaal
- 4. Federal Update

Presented by <u>David Musser</u> and <u>Annmarie Weisman</u> Presentation forthcoming

Federal Update: FAFSA[®] Simplification
 Presented by Melanie Storey
 Presentation forthcoming

Attend**▼**

Registration Information

2022 Virtual Conference Platform now open.

Register here

Breakout Sessions

Understanding Prison Education Programs for Confined or Incarcerated Individuals
 Presented by <u>Benedict Dorsey</u>
 Download Presentation

Surviving a Cyber Attack: Does Your Institution Have What It Takes?
 Presented by <u>Margaret Glick</u>
 Download Presentation

3. Protecting Student Data: The Facts, Stats, and Strategies for Preventing a Data Breach
Presented by <u>Daniel Commons</u>
Download Presentation

Update on Auditing Requirements for School *Title IV* Programs and Higher Education Emergency Relief Fu
 Presented by <u>Amy Bales</u> and <u>Mark Priebe</u>
 Download Presentation

Maintaining Your Institutional Eligibility
 Presented by <u>Susan Bowder</u> and <u>Kai Kimbrough</u>
 Download Presentation

6. Academic Calendars

Presented by <u>Byron Scott</u> <u>Download Presentation</u>

Title IV Administration for Non-term Credit Hour Programs
 Presented by <u>Byron Scott</u>
 <u>Download Presentation</u>

COVID-19: What Now and What Next – An encore presentation from the 2021 FSA Training Conference
 Presented by <u>Greg Martin</u> and <u>David Musser</u>
 Download Presentation

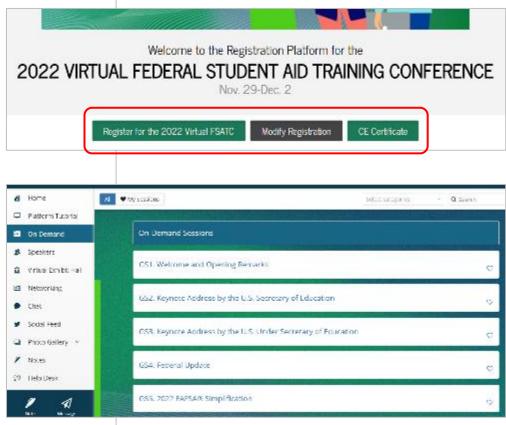
FAFSA[®] Simplification: Use of Federal Tax Information
 Presented by <u>Dennis Kramer</u>
 <u>Download Presentation</u>

National Student Loan Data System (NSLDS) Website and Capabilities Demo – PART 1
 Presented by <u>Tina Hansen</u>
 <u>Download Presentation</u>

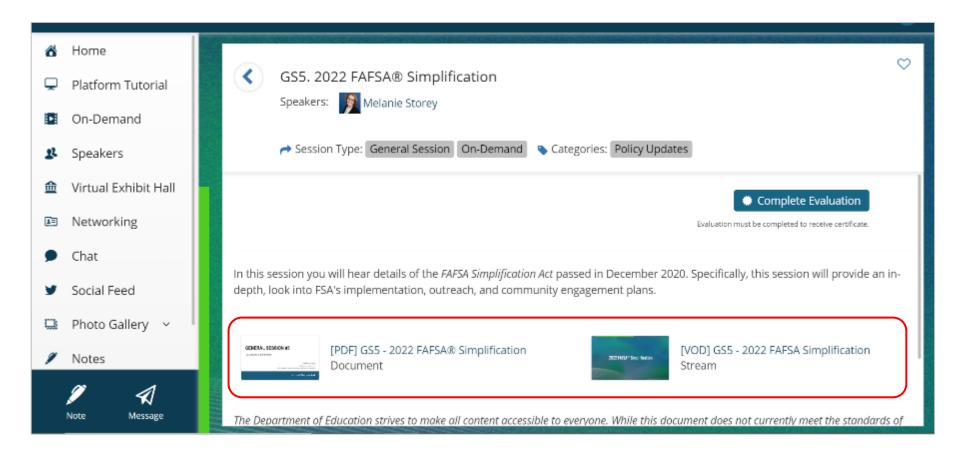
11. Live Teams Q&A for National Student Loan Data System (NSLDS) Website and Capabilities – PART 2
Presented by <u>Tina Hansen</u>



- Live Teams Q&A for National Student Loan Data System (NSLDS) Website and Capabilities Presented by <u>Tina Hansen</u>
- 12. The Fight Against Fraud: How You Can Help Prevent the Misuse of Education Funds
 Presented by Doris Plaza, and Damian White
- 13 Canceled
- 14. One-Time Income Driven Repayment (IDR) Account Adjustment and Fresh Start Initiatives Presented by <u>Bruce Honer</u> Download Presentation
- 15. 2024-25 FAFSA Processing/FAA Access Changes
 Presented by <u>Rachel Coghland</u> and <u>Renee Wade</u>
 <u>Download Presentation</u>
- 16. 2024-25 FAFSA Form/Experience Changes Presented by Manal Farooq and Kellis Robbins Download Presentation
- 17. StudentAid.gov Walkthrough and Upcoming Attractions
 Presented by <u>Tait Chamberlain</u> and <u>Nick Dvorscak</u>
 Download Presentation
- 18. Regulatory Update Session 1 Presented by <u>Tamy Abernathy</u> and <u>Rene Tiongquico</u> Download Presentation
- Regulatory Update Session 2
 Presented by <u>Richard Blasen</u>, and <u>Gregory Martin</u> Download Presentation
- The Clery Act and Campus Safety and Security: What's New Presented by <u>Anna Archila</u>, <u>James Moore</u> Download Presentation
- 21. Cohort Default Rate (CDR) Information Session
 Presented by Marcus DeCosta and Kecia Merrick-Ross
 Download Presentation
- 22. FSA Partner Connect: Coming In 2023
 Presented by <u>Trey Harrison</u> and <u>Amber Johnson</u>
 <u>Download Presentation</u>









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Questions/Comments



Thank you for attending today!

