User Guide:

Financial Aid Application Completion

- ❑ Access and Agreement

ISAC
Illinois Student Assistance Commission

October 2022

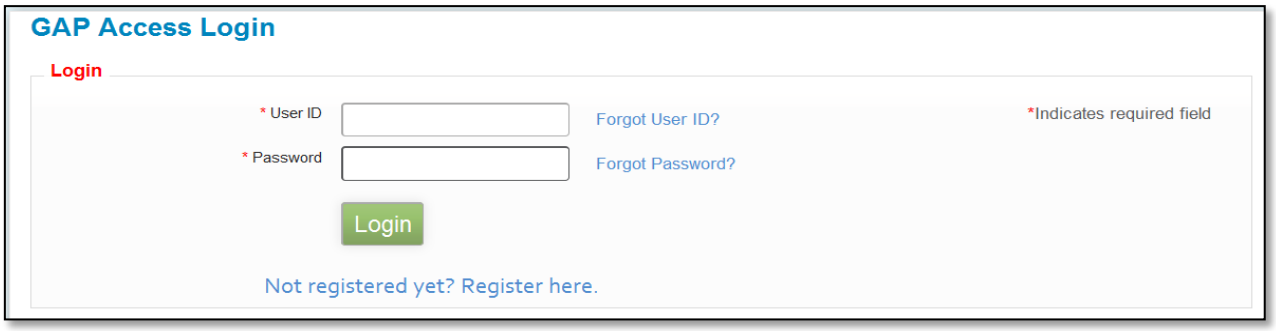
Introduction to the Financial Aid Application Completion

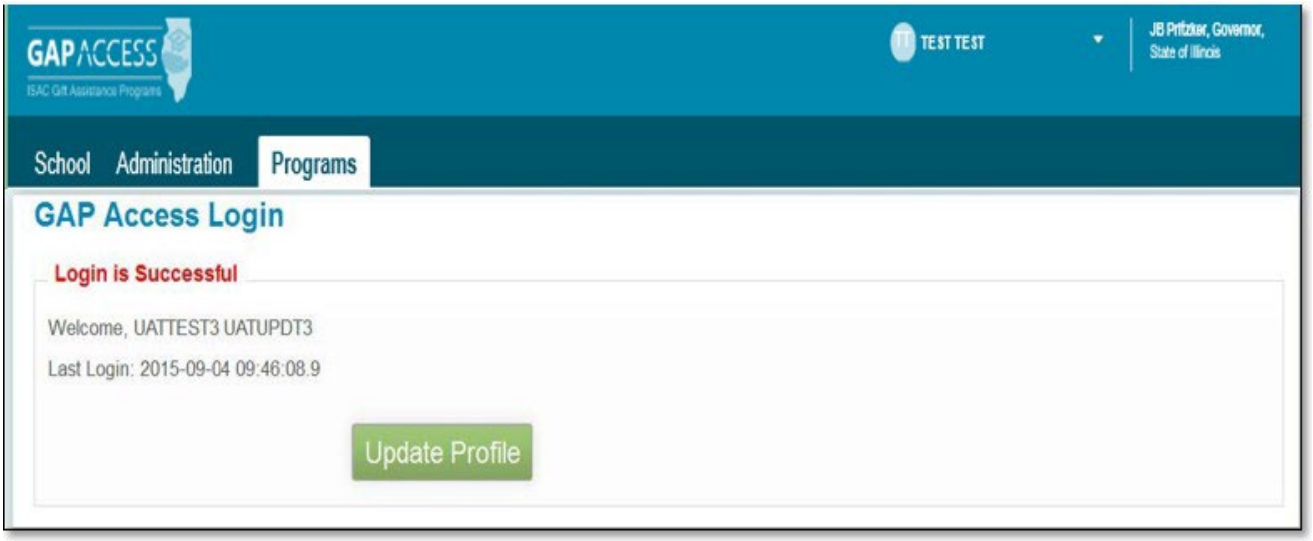
The Financial Aid Application Completion provides the means for high school districts across the state to identify which of their students have completed the Free Application for Federal Student Aid (FAFSA®) in a given academic year. Data available includes names of students; aggregate data for the entire student body; how many students are eligible for MAP and the federal Pell Grant Program; expected family contribution (EFC) ranges and a listing of the first-choice colleges to which students have sent their FAFSA results.

After activating your GAP Access Account (see the GAP Access page on the isac.org website for instructions), login to GAP Access from the main login page.

In order to participate in the Financial Aid Application Completion Initiative, **your school principal** must certify and agree to the terms and conditions of the *Financial Aid Application Completion Participation Agreement for Illinois Educational Entities.* FAFSA privileges require Primary Administrator acknowledgement to terms and conditions.

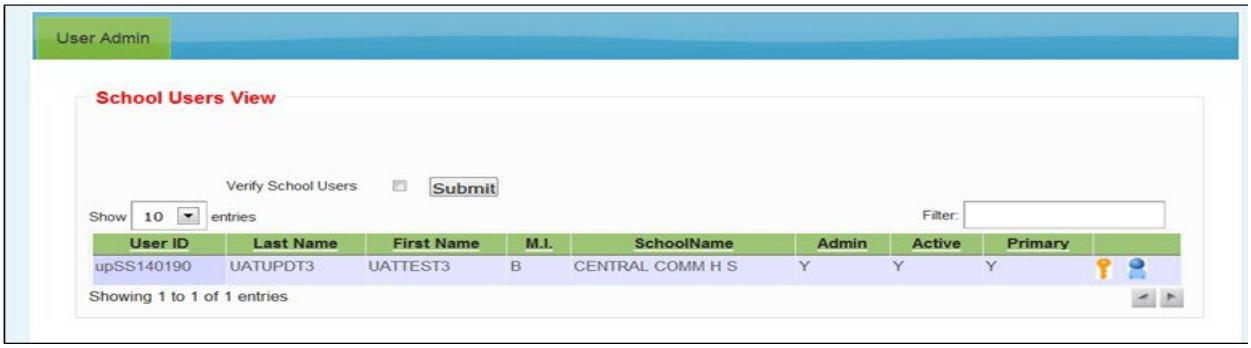
NOTE: Pages 2 - 6
If the principal has already completed the Financial Aid Application Completion participation agreement, skip this section, and start at page 7.




GAP ACCESS
ISAC Gift Assistance Programs
TT TEST TEST
JB Pritzker, Governor,
State of Illinois
School
Administration
Programs
GAP Access Login
Login is Successful
Welcome, UATTEST3 UATUPDT3
Last Login: 2015-09-04 09:46:08.9
Update Profile

Program Privileges

After a successful login, click the Administration tab. From there, click the User Administration menu option to access the School Users View page.

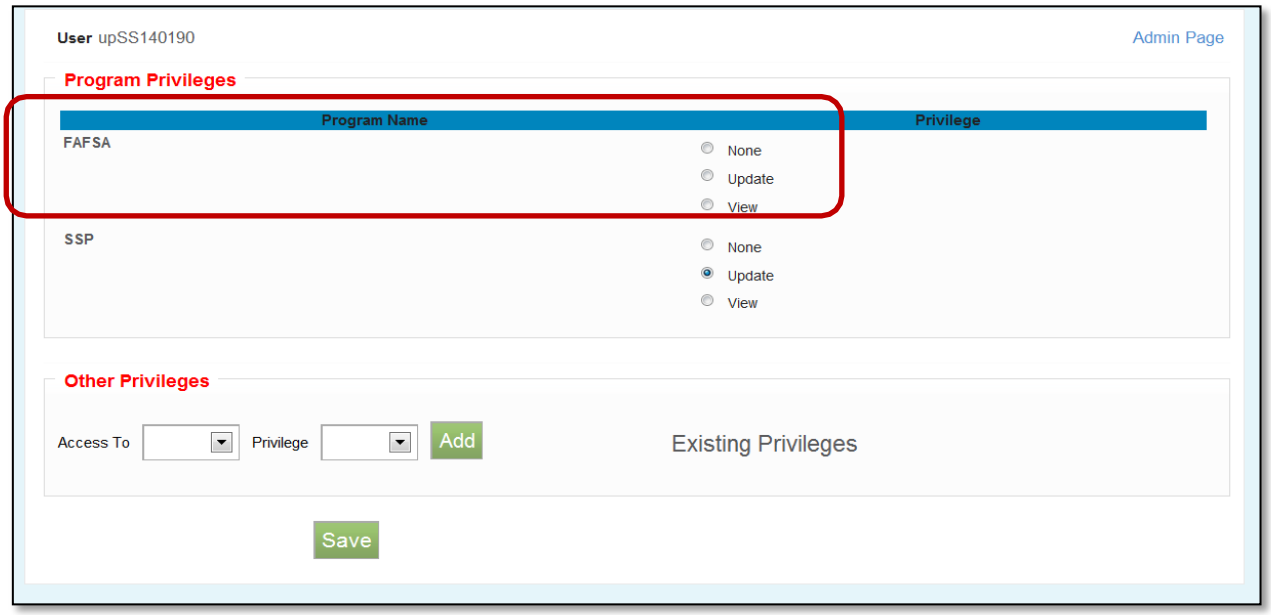


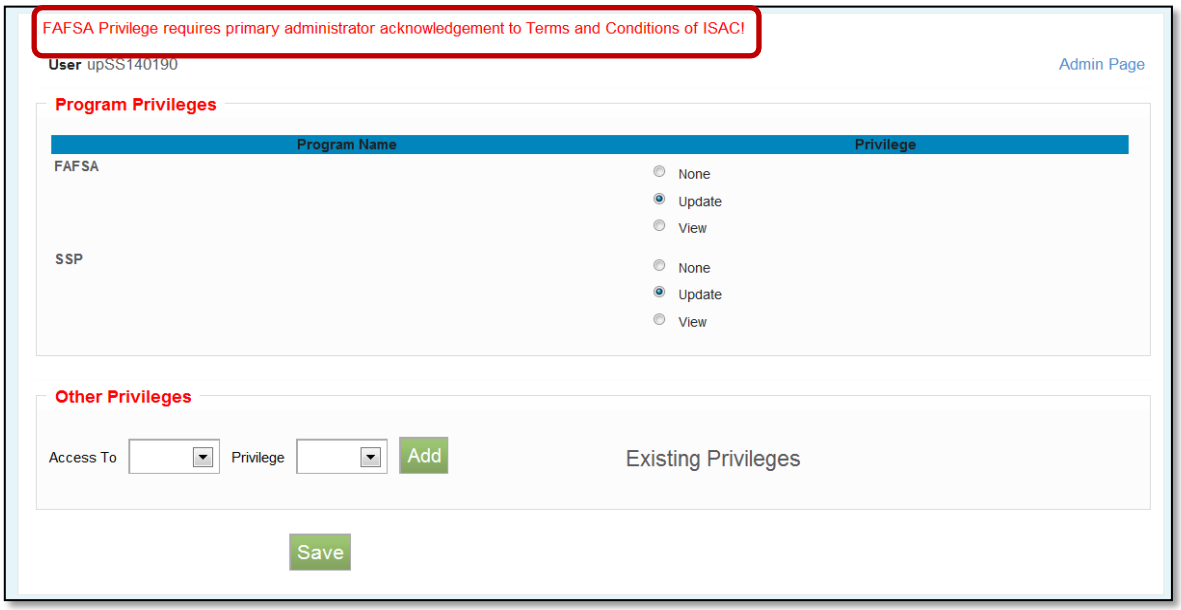
Select the Primary Administrator by clicking on the person icon associated with the user's name. This will bring up the Program Privileges screen.

Program Privileges Screen

To set a Financial Aid Application Completion privilege, click the appropriate button (None, Update or View) in the FAFSA section, then click Save.

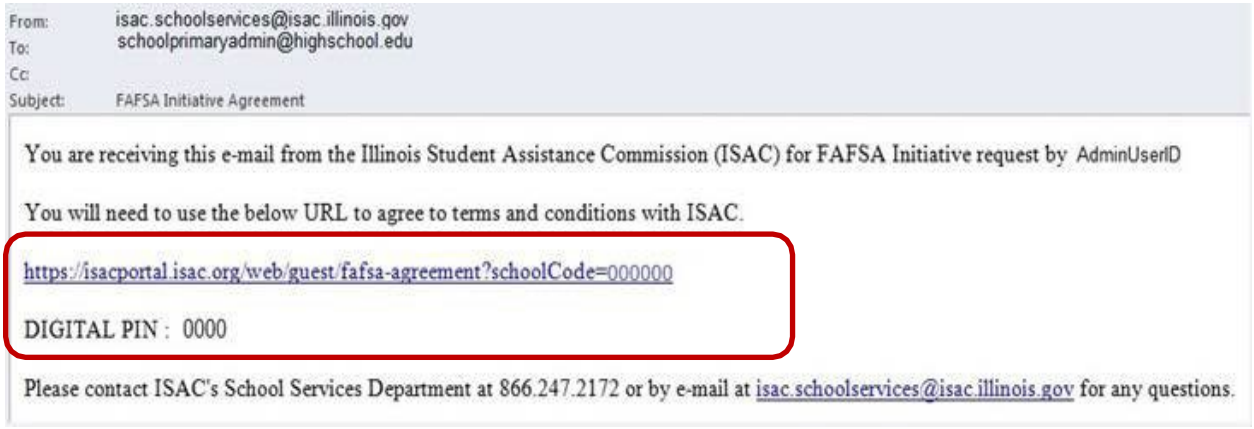
After saving, a message indicating that terms and conditions must be acknowledged will appear on the screen. This will be followed by an e-mail providing a link to certify the Financial Aid Application Completion Agreement. The direct link will be sent to the e-mail address provided when you initially registered for GAP Access.





Agreeing to Terms and Conditions

Check your e-mail for a message from isac.schoolservices@illinois.gov. The e-mail will provide a digital PIN and an embedded link that will allow you to read and agree to the terms and conditions of the *Financial Aid Application Completion Participation Agreement for Illinois Educational Entities*. Click the embedded link to go to the FAFSA Agreement screen.


From: isac.schoolservices@isac.illinois.gov
To: schoolprimaryadmin@highschool.edu
Cc:
Subject: FAFSA Initiative Agreement

You are receiving this e-mail from the Illinois Student Assistance Commission (ISAC) for FAFSA Initiative request by AdminUserID

You will need to use the below URL to agree to terms and conditions with ISAC.

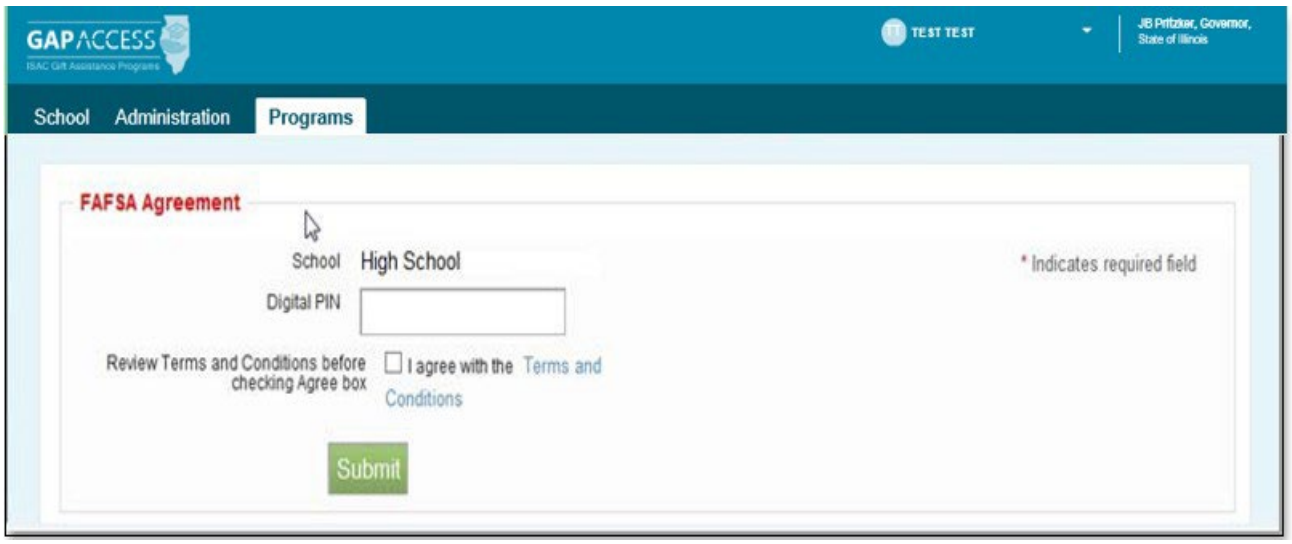
https://isacportal.isac.org/web/guest/fafsa-agreement?schoolCode=000000

DIGITAL PIN : 0000

Please contact ISAC's School Services Department at 866.247.2172 or by e-mail at isac.schoolservices@isac.illinois.gov for any questions.

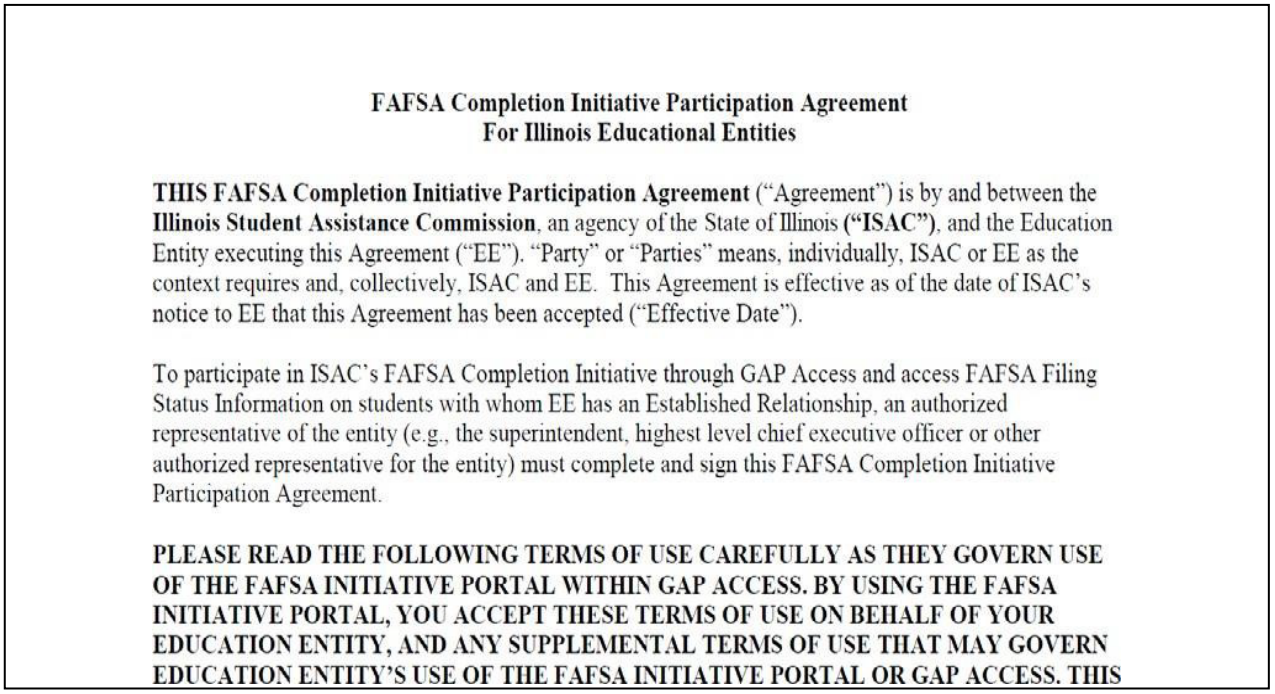
The **FAFSA Agreement** screen is shown below. Follow these steps to agree to the terms and conditions.

1. Review the terms and conditions by clicking on the Terms and Conditions blue link. A sample screen shot of the Terms and Conditions is provided on page 5.
2. If you agree to the terms and conditions, click the checkbox next to "I agree with the Terms and Conditions."
3. Enter the Digital PIN from the e-mail in the Digital PIN box.
4. Click Submit. Note: you will not receive any confirmation that the submission has completed.



Financial Aid Application Completion Participation Agreement

When the Terms and Conditions link from the FAFSA Agreement page is clicked, the following screen displays the *Participation Agreement for Illinois Educational Entities*. This document should be read in its entirety prior to clicking the "I Agree with the Terms and Conditions" box on the FAFSA Agreement screen.



FAFSA Completion Initiative Participation Agreement
For Illinois Educational Entities

THIS FAFSA Completion Initiative Participation Agreement ("Agreement") is by and between the **Illinois Student Assistance Commission**, an agency of the State of Illinois **("ISAC")**, and the Education Entity executing this Agreement ("EE"). "Party" or "Parties" means, individually, ISAC or EE as the context requires and, collectively, ISAC and EE. This Agreement is effective as of the date of ISAC's notice to EE that this Agreement has been accepted ("Effective Date").

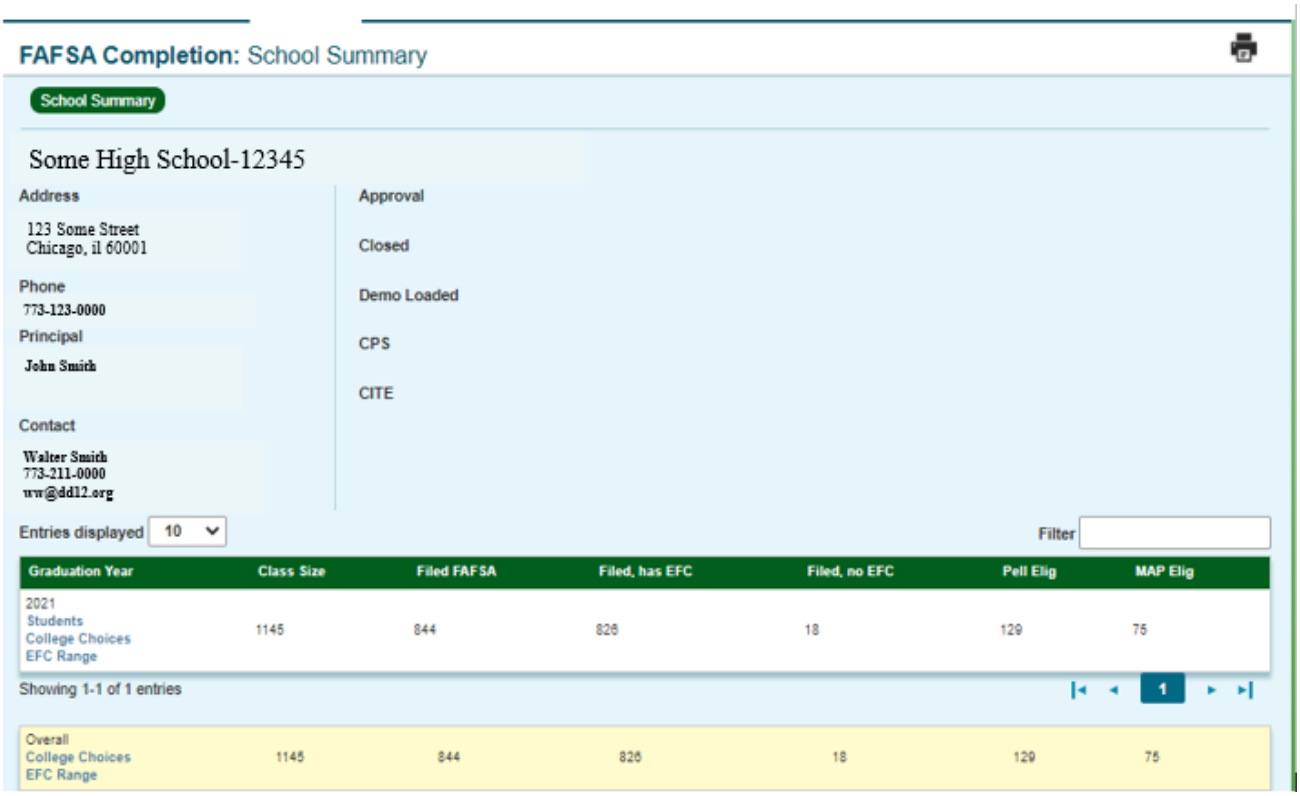
To participate in ISAC's FAFSA Completion Initiative through GAP Access and access FAFSA Filing Status Information on students with whom EE has an Established Relationship, an authorized representative of the entity (e.g., the superintendent, highest level chief executive officer or other authorized representative for the entity) must complete and sign this FAFSA Completion Initiative Participation Agreement.

PLEASE READ THE FOLLOWING TERMS OF USE CAREFULLY AS THEY GOVERN USE OF THE FAFSA INITIATIVE PORTAL WITHIN GAP ACCESS. BY USING THE FAFSA INITIATIVE PORTAL, YOU ACCEPT THESE TERMS OF USE ON BEHALF OF YOUR EDUCATION ENTITY, AND ANY SUPPLEMENTAL TERMS OF USE THAT MAY GOVERN EDUCATION ENTITY'S USE OF THE FAFSA INITIATIVE PORTAL OR GAP ACCESS. THIS

5. After reading the agreement and checking the **I agree with the Terms and Conditions** box, log into GAP Access. The FAFSA Initiative tab will not yet appear. You will need to return to the Program Privileges page to assign the appropriate privileges for your school's users as described on page 3 of this guide. Then logout of GAP Access before continuing.

Financial Aid Application Completion: School Summary Screen

After completing steps 1-5, when you next log into GAP Access, the FAFSA Initiative tab will appear. Click the FAFSA Initiative tab to go to the Financial Aid Application Completion: School Summary screen. The screen displays the Financial Aid Application Completion data for the school.

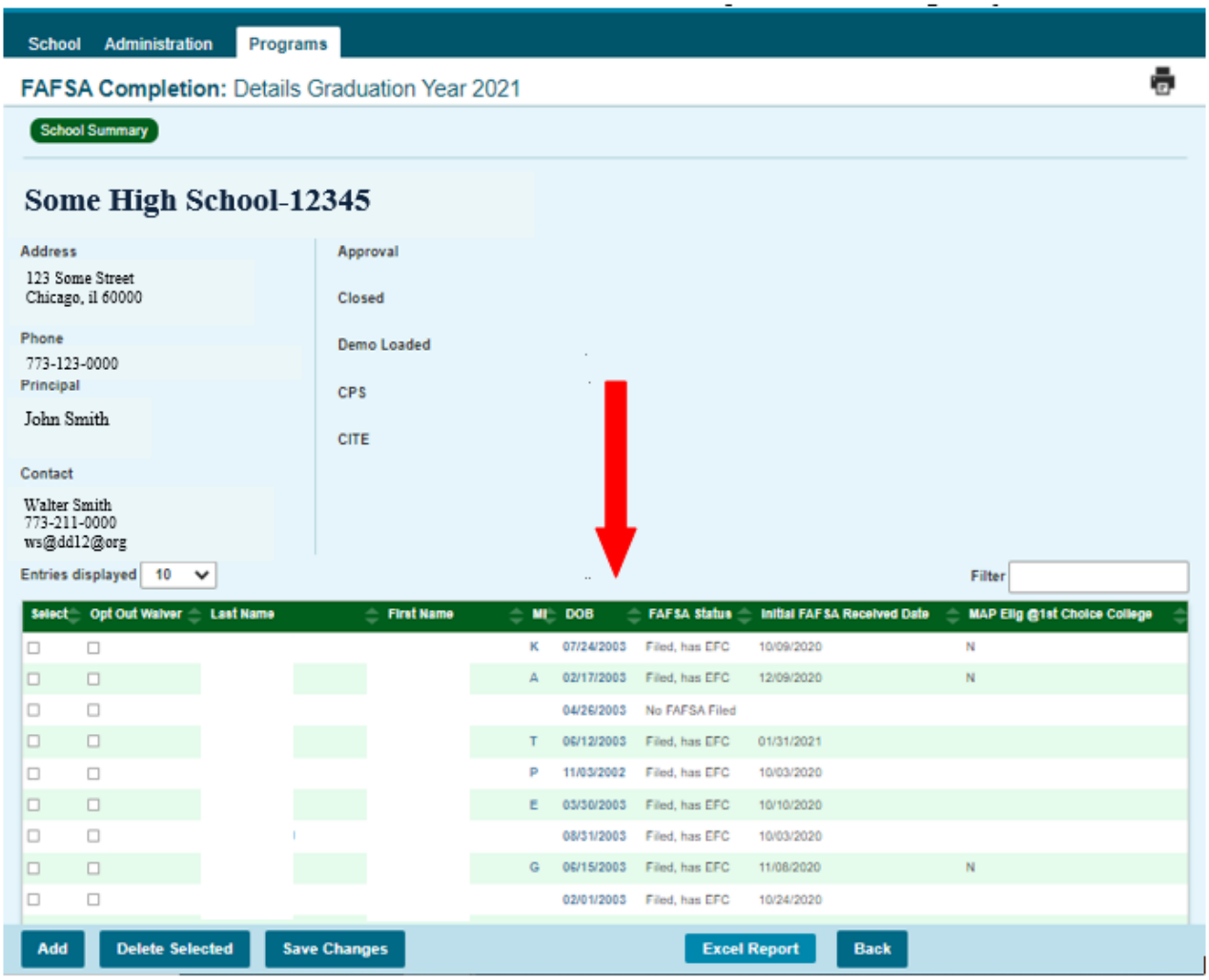


The School Summary screen will display…

- **Graduation Year**
- **Class Size**
- **Filed FAFSA***
- **Filed, has EFC***
- **Filed, No EFC***
- **Pell Eligible**
- **MAP Eligible***

Financial Aid Application Completion: Details Screen

- The blue menu items listed under the Graduation Year column on the School Summary screen (see previous page): Students, College Choices and EFC Ranges, are links to additional detail pages.
- Click the Students link to view the Details page. The "Details" page displays a listing of senior students with associated information status and potential MAP eligibility data.



- In the column titled "**FAFSA Status**", there are three possible statuses for a student record:
  - **No FAFSA Filed**: The student did not file a FAFSA
  - **Filed, has EFC**: The student filed a FAFSA and an Expected Family Contribution (EFC) was calculated.
  - **Filed, no EFC**: The student filed a FAFSA however, some information was incomplete, or the information provided prevented an EFC from being calculated.
- Other columns display the date the **initial FAFSA** was received by the Central Processing System for the year and the students' potential **Monetary Award Program (MAP) eligibility** at the college listed first by the student on the FAFSA.

Financial Aid Application Completion: Student Detail

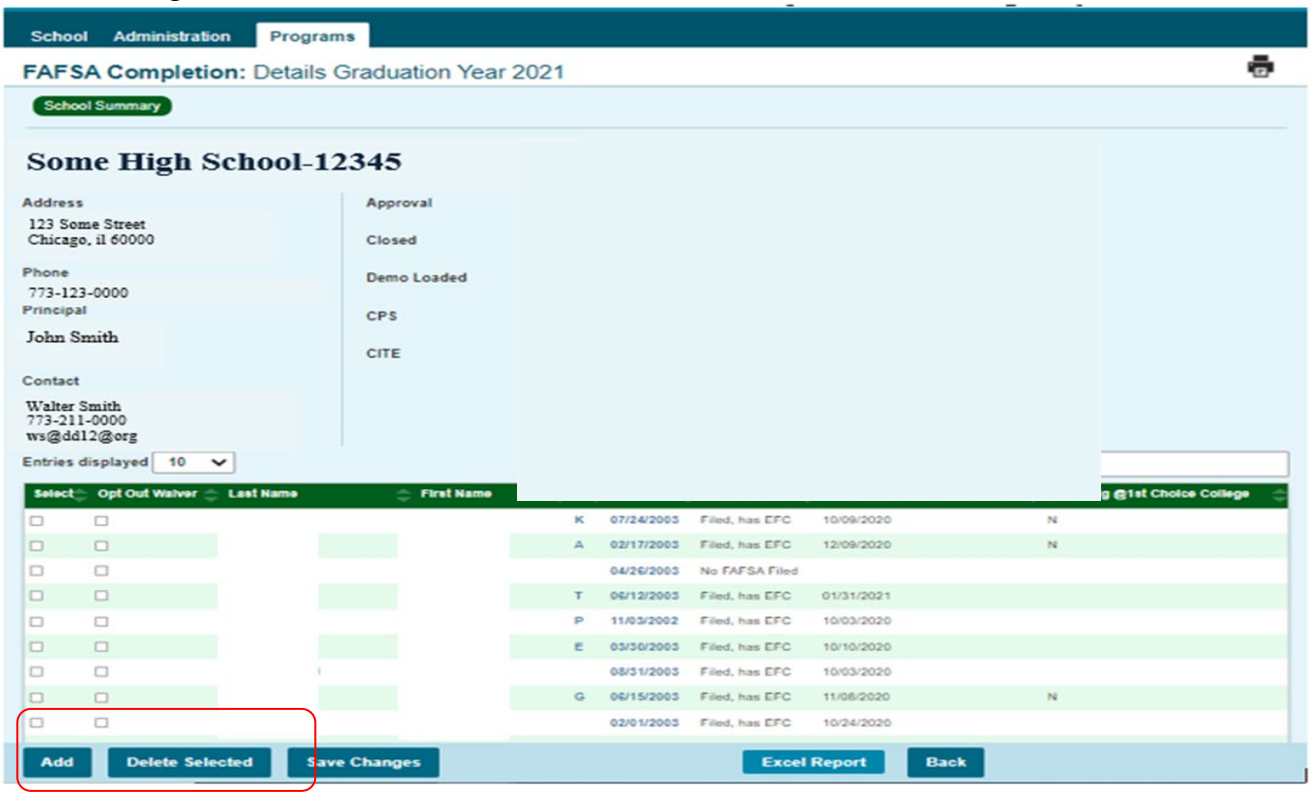
Add and Delete Functionality

The Add/Delete feature is available on the **FAFSA Completion School Summary** screen. Use this function to:

- Add student records to your school's list
- Delete student records that should not appear on the school's list
- To make name or date of birth adjustments

Please keep in mind that neither the add, delete or adjustment functions make any change to FAFSA data. The impact of any change made in the FAFSA Initiative system is to the school's student list only. Subsequently, FAFSA data is matched against the student list. Adjusting demographic data could improve the ability for the system to match the student record with a FAFSA.

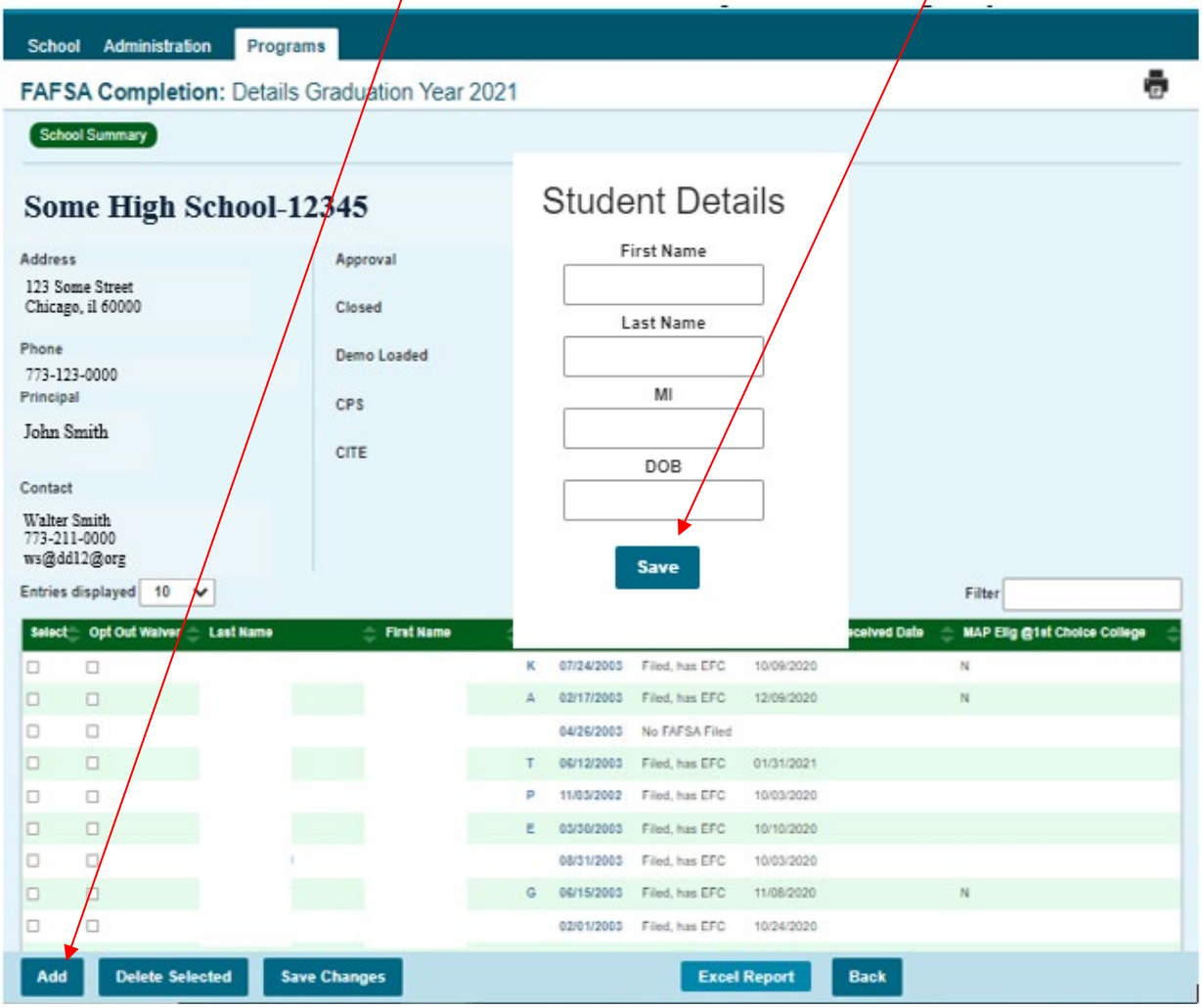
IMPORTANT NOTE: The Add and Delete functions make immediate changes to the school's student list. However, the FAFSA match against that list only occurs once a week. So, you may not see an immediate change in the FAFSA Status, Initial FAFSA Received Date and MAP Elig@ 1st Choice College fields. Typically, new FAFSA match data is available to schools on Monday morning.



Financial Aid Application Completion: Student Detail

Add a Student Record

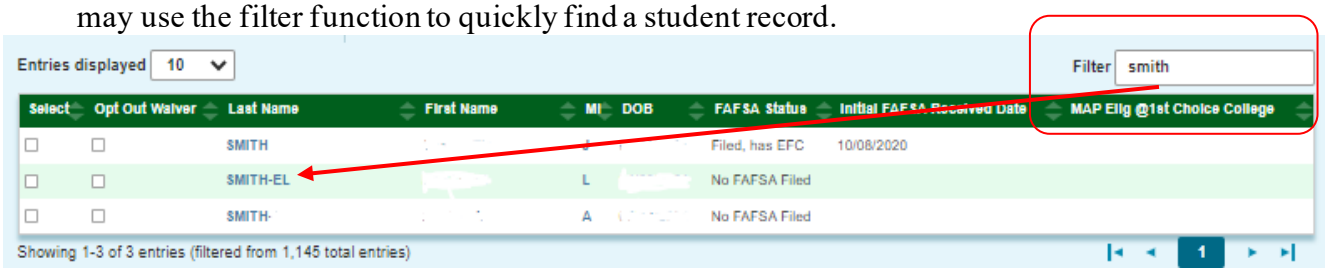
To add a student record, click the Add button and a data entry box will appear. Enter the student's first name, last name, middle initial, and date of birth and click the Save button. All four fields are required to add a record.



Financial Aid Application Completion: Student Detail

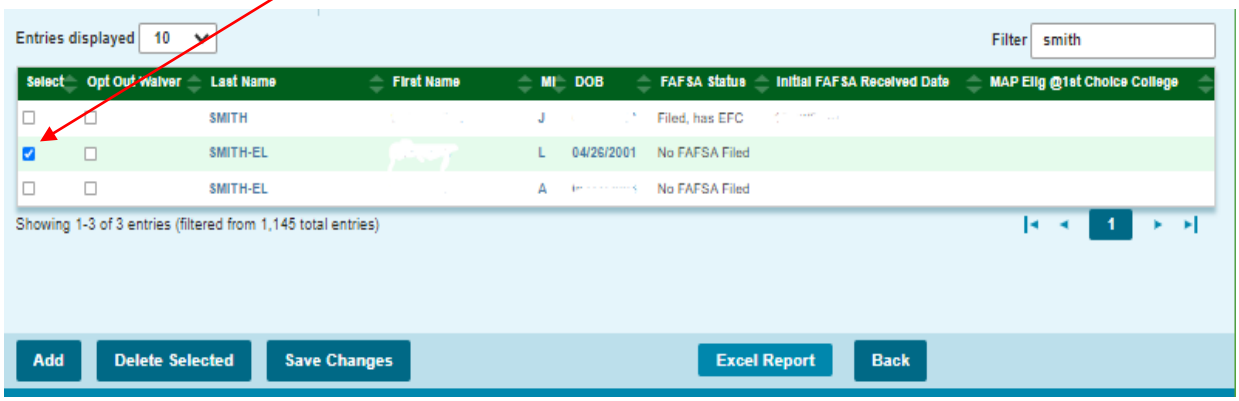
Add a Student Record (cont.)

The student's name will appear in the proper alphabetical order position on the student list. You may use the filter function to quickly find a student record.



Delete a Student Record

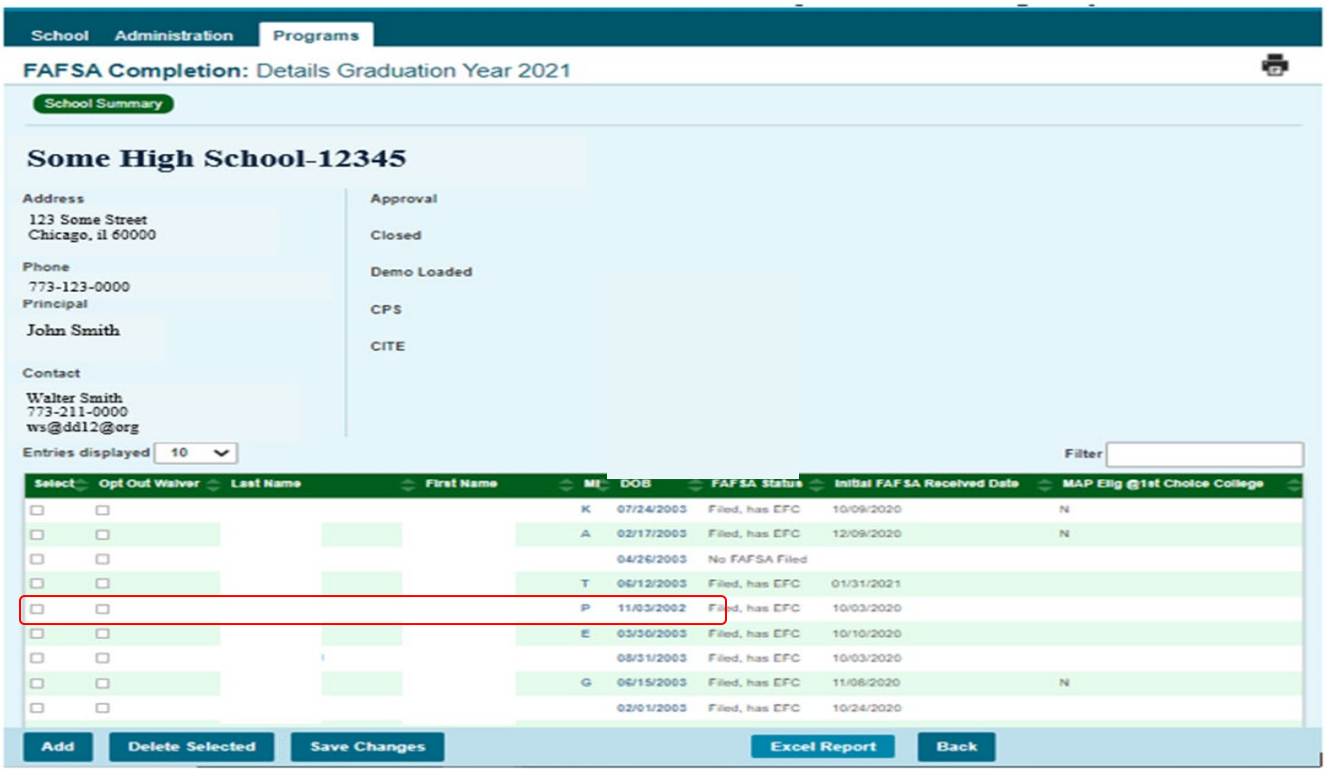
To delete a student record, select the student(s) to delete by checking the box in the Select column. It is highly recommended that you only delete one student at a time. **You will not get a warning once you click the** Delete Selected **button**. After you have selected the record, click the Delete Selected

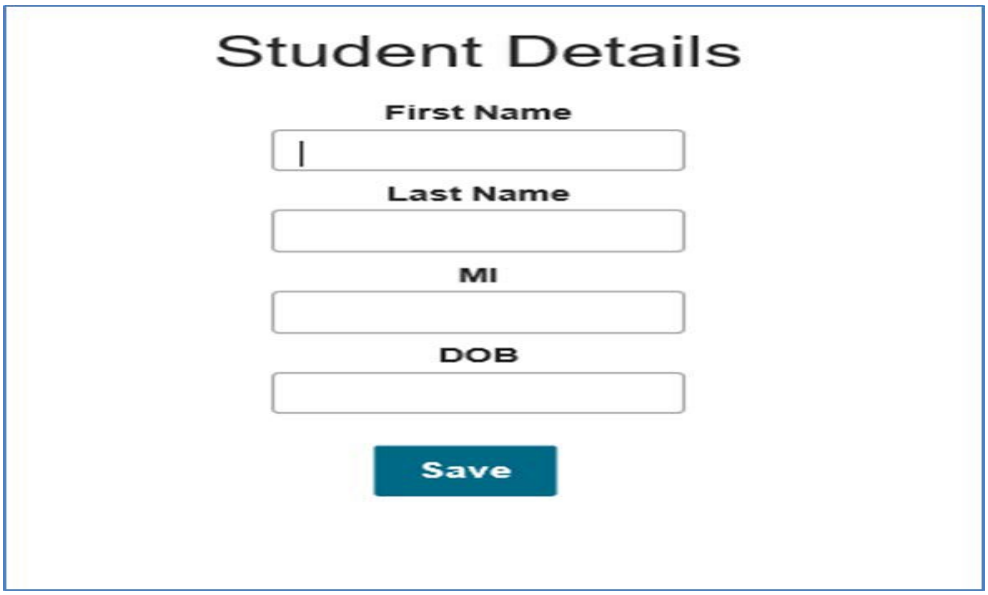


Financial Aid Application Completion: Student Detail

Adjust Demographic Information

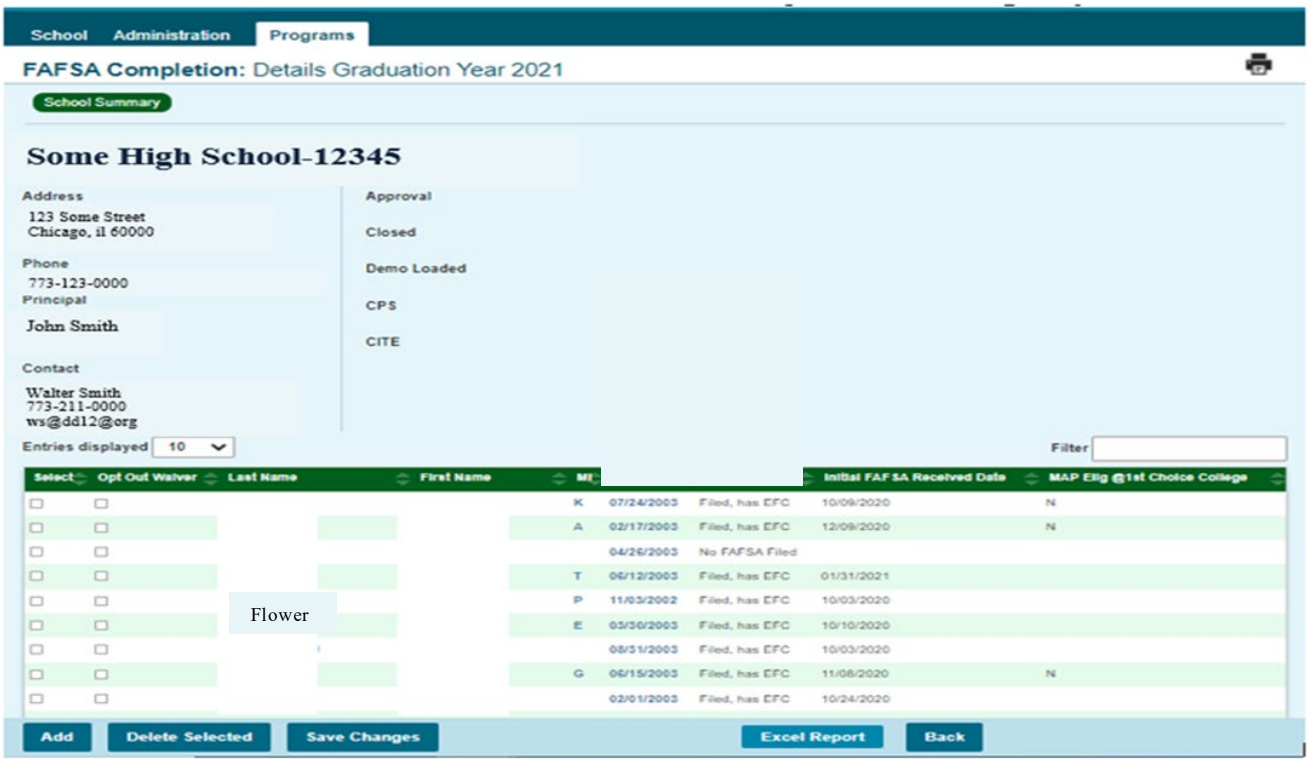
Click on the student's name and the Student Details box will appear. You will be able to edit the demographic information as you want it to appear. Click on the Save button.





Financial Aid Application Completion: Student Detail

The adjusted record is now the record for the student and is the one that will be used in the next match cycle.



Financial Aid Application Completion: Student Detail

Student Record Upload

The student record upload process allows **Private schools only** to upload a current list of seniors. Once uploaded, the student list will then be used to match FAFSA and Alternative Application completion data. **It is important to note that the Financial Aid Application Upload function is separate from the State Scholar Program File Upload process. The Public school's data list of seniors will be provided from the Illinois State Board of Education.**

The student list file must be formatted in Microsoft Excel 2003 or above (.XLS, XLSX, XLSS), or in CSV (Comma Delimited), and follow ISAC's prescribed file layout.

The data elements that will need to be uploaded for the high school's current **senior class** are:

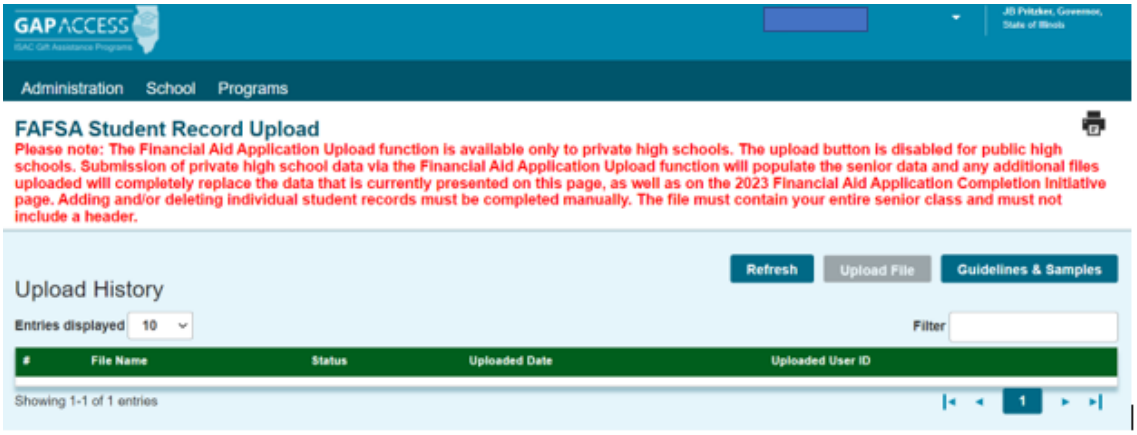
- last name
- first name
- middle initial
- date of birth

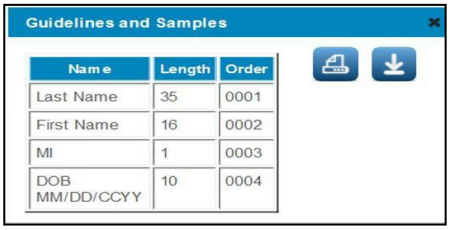
Please note: The Financial Aid Application Upload function is available only to private high schools. The upload button is disabled for public high schools. Submission of private high school data via the Financial Aid Application Upload function will populate the senior data and any additional files uploaded will completely replace the data that is currently presented on this page, as well as on the 2023 Financial Aid Application Completion Initiative page. Adding and/or deleting individual student records must be completed manually. The file must contain your entire senior class and must not include a header.

To upload individual or multiple students, click on the FAFSA Student Record Upload tab

The **Upload: History** - Starting from the right of the screen, Guidelines and Samples provides formatting information regarding the data to be submitted.

Financial Aid Application Completion: Student Detail





The will open the Excel spreadsheet.

	A	B	C
1	Order	Name	Length
2	0001	Last Name	35
3	0002	First Name	16
4	0003	MI	1
5	0004	DOB MM/DD/CCYY	10

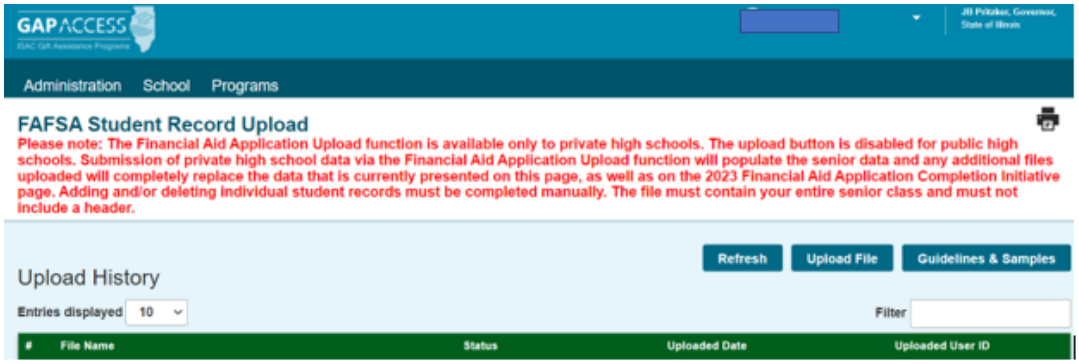
The **Guidelines** displays a file layout for the data when creating a file to upload. **Samples** provides the Excel spreadsheet with the data fields in the appropriate order. **All files must be formatted in Microsoft Excel 2003 or above, or in CSV, and follow ISAC's prescribed file layout**.

Do not password protect the file.
Do not use any punctuation – periods, apostrophe, dashes

The print option will print the spreadsheet file layout

FAFSA Upload: History

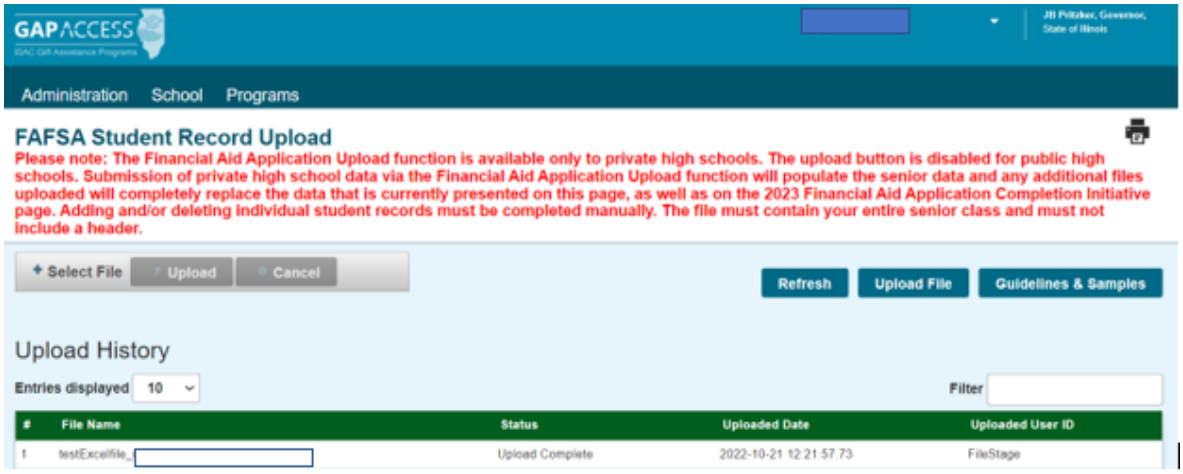
- To upload a file, Click the Upload File button next to Guideline and Samples



Next a dialog box will appear, prompting you to browse your computer to select a file to upload:

Browse your computer to find the file you wish to upload. Double Click on the desired file, to load it into the dialog box. Make sure it is the file you want to use. If not, click Cancel to delete it from the dialog box.

FAFSA Upload: History



Once the file upload is completed successfully, the file will appear with a "Upload Complete" status and no further action is required. Your current senior student list is now available in the Financial Aid Application Completion section of GAP Access. **These students will be included in the next FAFSA and Alternative Application records matching cycle**. Current match results are available weekly on Monday mornings.

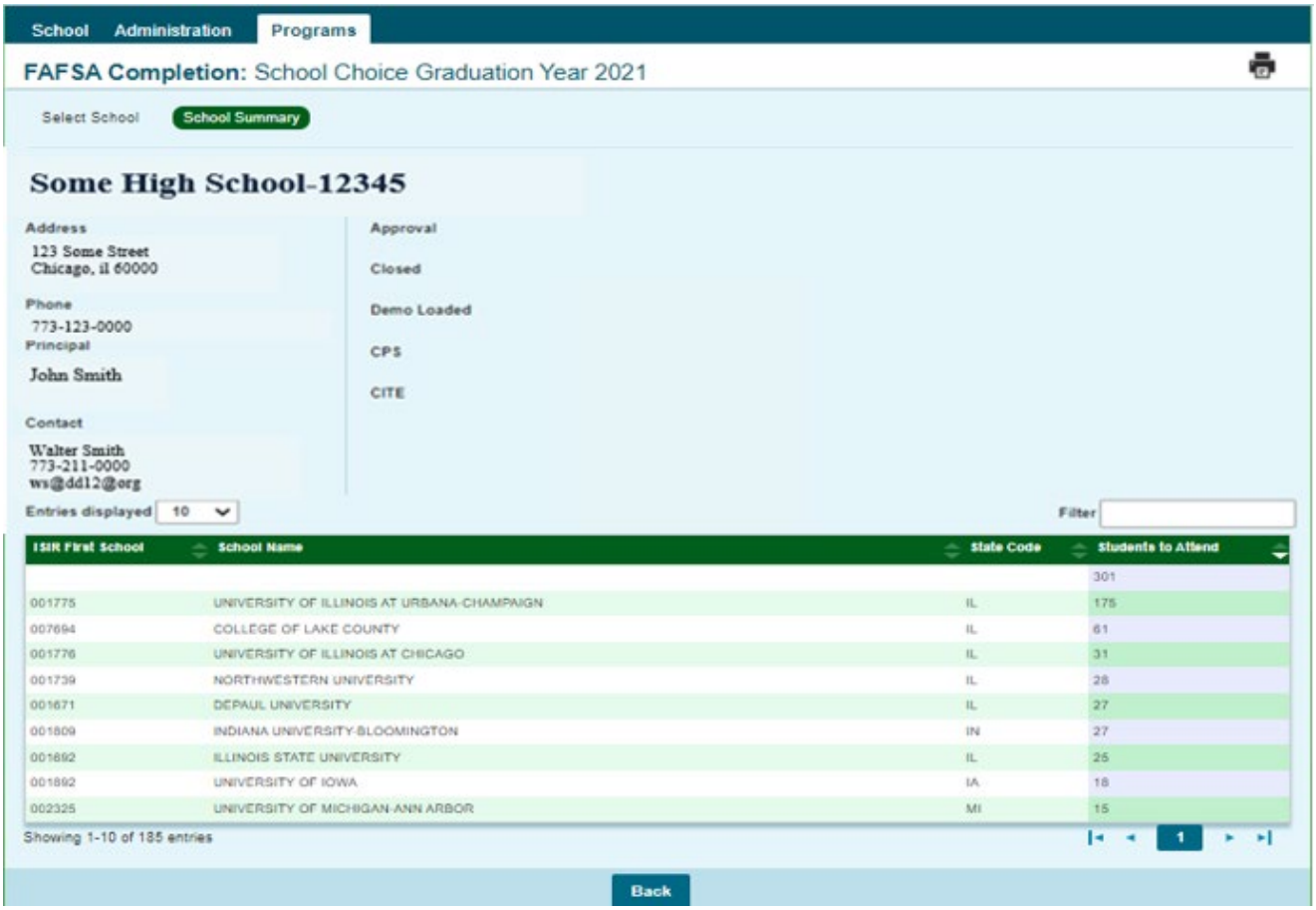
File Status

- Upload Complete – File has been accepted and has passed all validation. The student list is now available in the FAFA Completion section of GAP Access. No further action required.

If your file will not upload, check that the file follows the required format. If you have any questions or need assistance, please contact ISAC's School Services Department by calling 866.247.2172 or by sending an e-mail message to isac.schoolservices@illinois.gov.

Financial Aid Application Completion: College Choices Screen

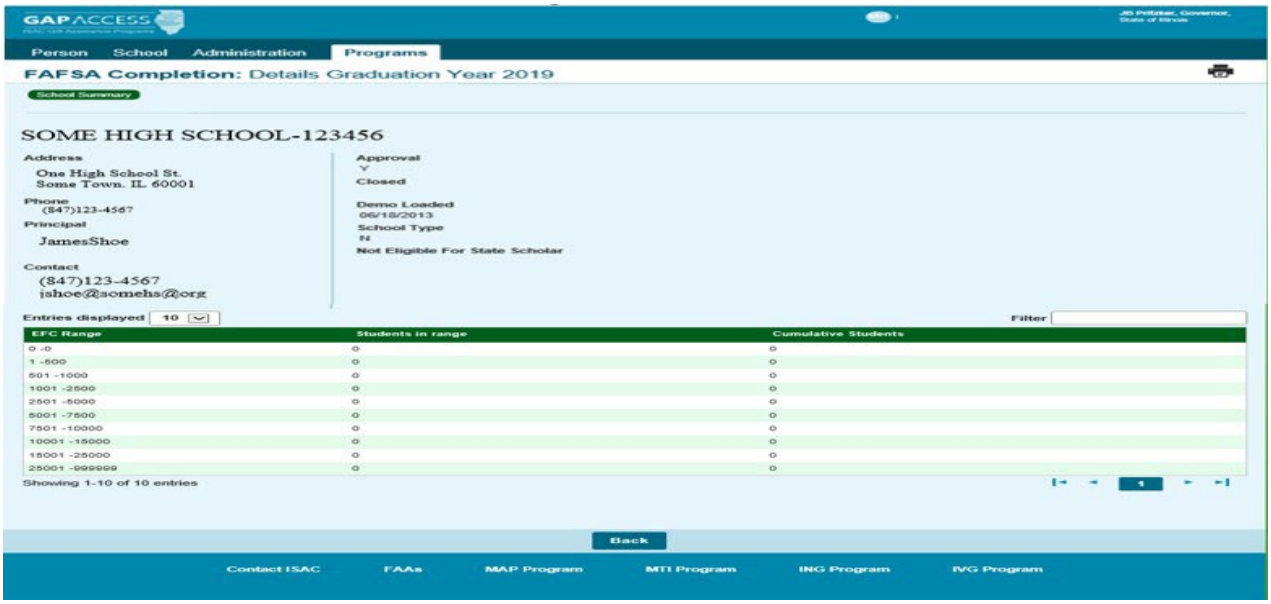
The College Choices screen lists the colleges designated as "1st Federal School Code" on the FAFSA by the students from your school. The schools are listed based on the number of students indicating that school, with the highest number listed first to the lowest number.



Columns

- **ISIR First School** = 1st Federal School Code listed on the FAFSA
- **School Name** = Name of the school associated with the school code
- **State Code** = The code for the state in which the school is located
- **Students to Attend** = The number of your students designating that school as 1st Federal School Code on the FAFSA

Financial Aid Application Completion: EFC Ranges



Columns

- **EFC Range** = Expected Family Contribution ranges
- **Students in Range** = The number of students in the EFC range from your school
- **Cumulative Students** = The number of students in the EFC range plus the number of students in the preceding EFC ranges from your school.

Troubleshooting

1. **Here are a few common reasons why a FAFSA may not show as filed**.

- Timing of when the FAFSA was submitted. The newest FAFSA matches are available every Monday morning. If the student filed Monday afternoon, the FAFSA will not appear until the following Monday.
- The students name must match. The following are common no match reason due to name discrepancies.
  - ✓ Switching the first name and last name.
  - ✓ Student filed the wrong year FAFSA.
  - ✓ Student list may not show a middle initial, but the FAFSA was filed using a middle initial.
  - ✓ Student list does not show name suffix (II, Jr., Sr.), but the FAFSA was filed using a name suffix.
  - ✓ Student filed the FAFSA using a name suffix as part of the last name or the first name.
  - ✓ Hyphenated last names. Confirm the FAFSA was filed using the hyphenated name. Check if a space was used between the name and the hyphen.
- Date of birth.
- There is also a match on the high school name. If the schools name is City High School but the FAFSA was filed using West Campus High School, that could cause a no match.

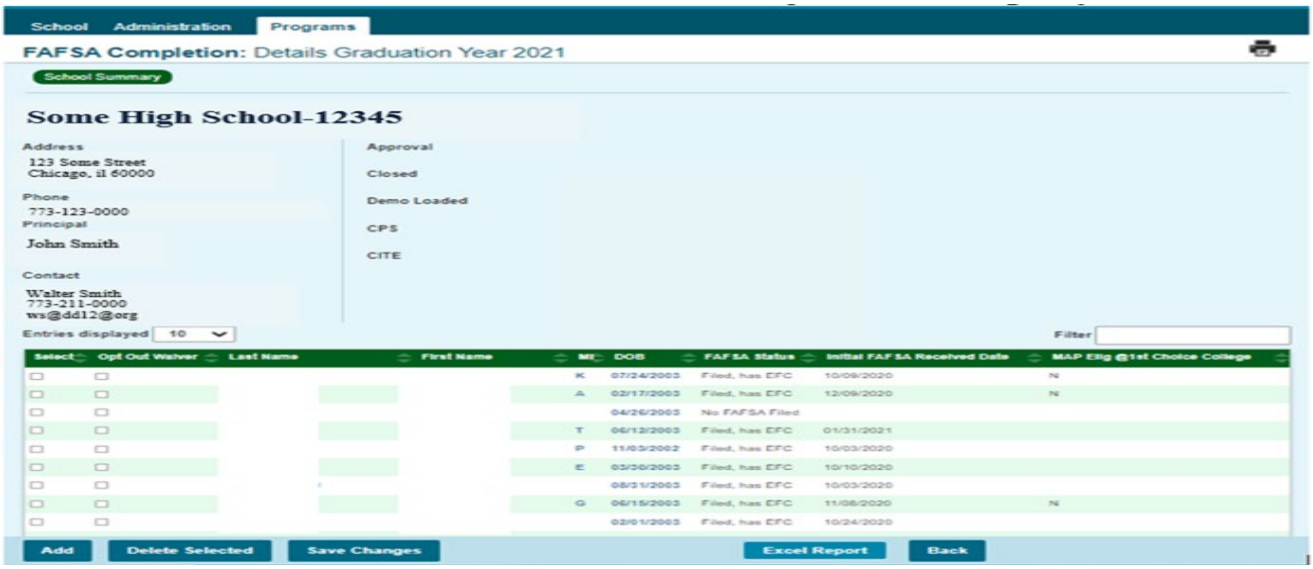
If you are not able to find a discrepancy in the name or date of birth, contact ISAC's School Services Department by calling 866.247.2172 or sending an e-mail message to isac.schoolservices@illinois.gov for assistance.

2. **The file could not be uploaded error. The file must follow the ISAC template.**
   - ✓ Do not password protect the file.
   - ✓ Do not use any punctuation – periods, apostrophe, dashes

	Name Box	B	C
1	**Order**	**Name**	**Length**
2	0001	Last Name	35
3	0002	First Name	16
4	0003	MI	1
5	0004	DOB MM/DD/CCYY	10

Reports

An Excel report, mirroring the format of the **Financial Aid Application Completion: Details Graduation Year** screen, may be generated. The data can then be sorted as needed (i.e., by FAFSA Status, etc.).



	A	B	C	D	E	F	G	H
1	FAFSA Completion Details for SOME HIGH SCHOOL(12345): 2021							
2								
3	OPT_OUT_WAIVER	LAST_NAME	FIRST_NAME	MI	DATE_OF_BIRTH	FAFSA_STATUS	INIT_FAFSA_RECEIVED_DATE	MAP_ELIG_FOR_1ST_CHOICE
4		SMITH	JOHN	K	07/24/2003	Filed, has EFC	9/22/2021	N