2022-23 Award Year
# 2022-23 Spring Term Claim Deadline Dates

<table>
<thead>
<tr>
<th>Program</th>
<th>Submit On or Before</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monetary Award Program (MAP)</td>
<td>03/10/23</td>
</tr>
<tr>
<td>Illinois National Guard (ING) Grant</td>
<td>04/07/23</td>
</tr>
<tr>
<td>Illinois Veteran Grant (IVG)</td>
<td>05/26/23</td>
</tr>
<tr>
<td>Minority Teachers of Illinois (MTI) Scholarship</td>
<td>02/24/23</td>
</tr>
<tr>
<td>Golden Apple (GA) Scholars of Illinois Program</td>
<td>02/24/23</td>
</tr>
<tr>
<td>Early Childhood Access Consortium for Equity (ECACE) Scholarship</td>
<td>02/24/23</td>
</tr>
</tbody>
</table>

- For more details on payment processing for each program, see their respective pages in the Gift Assistance area of the FAA section at isac.org
2022-23 MAP Updates

• To be considered timely, the following 2022-23 MAP claims must be submitted **no later than 7 p.m. (CT) on Friday, March 10, 2023**
  
  o **For second term:**
    ▪ initial claims
    ▪ increases to previously-submitted claims
  
  o **For first term:**
    ▪ initial claims
    ▪ increases to previously-submitted claims
    ▪ late claims (claims submitted after the fall term deadline date of December 9, 2022)

• All MAP claims for the first and second terms will continue to be paid through the second-term claim deadline date

• No suspension of 2022-23 MAP award announcements is scheduled at this time
  
  o ISAC continues 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.
Other 2022-23 Program Updates

• Illinois National Guard Grant (ING)
  o Colleges may continue to submit benefit usage data and adjustments for the fall term, as well as for the spring term
  o Remind students that March 1, 2023 is the spring- and summer-term application deadline for the 2022-23
  o Applications received after March 1 will be considered for summer term only awards
  o Colleges are encouraged to regularly check their list of eligible students in the ING Grant system, as new student records are added throughout the year
    ▪ Especially after each term’s application deadline date has passed

• Illinois Veteran Grant (IVG)
  o Colleges may continue to submit benefit usage data and adjustments for the summer and fall terms, as well as for the spring term

• Dependents of Police, Fire, and Correctional Officers (PFC)
  o Remind students that March 1, 2023 is the spring- and summer-term award deadline for the 2022-23
  o Applications received after March 1 will be considered for summer term only awards
Other 2022-23 Program Updates

• MTI
  o In addition to submitting payment requests, schools should continue to ensure that all MTI certifications are completed throughout the year
  o This will ensure that your students will be included in any rounds of additional awarding that take place
  o Continue to monitor your student eligibility list for newly awarded students throughout the award year

• ECACE
  o Application for the 2022-23 ECACE Scholarship Program remains available
  o Although the priority date consideration date was July 15, 2022, untimely applications will continue to be considered for as long as funding remains available
Program Processing Reminders

• Be sure to review your payment results reports in GAP Access after submitting your program claims to ensure everything processed as expected.

• Result codes can be found in the User Guides and in the FAA area of isac.org.

• Payment and reconciliation is an offset process so no refund checks should be sent to ISAC for adjustments until final reconciliation of the award year.

• Watch the Program News pages and e-messages for program updates.
  - isac.org/isac-gift-assistance-program/
GAP Access - Payment Vouchers

• Effective December 2022, a new report was implemented for tracking payment vouchers and warrants, and is available via GAP Access.

• The new report (which may be accessed via the Reports section and is identified by the same red PDF icon that appears with the “Payment Results/Exceptions” report) provides payment voucher and warrant information, dependent upon where the payment is in the process.

• Once ISAC processes a payment request and sends it to the State Comptroller, the report will appear with the following title format: (Program) Voucher INV mm-dd-yyyy SCH xxx.
  o At that point, the “WARRANT NO.” and “WARRANT DATE” fields on the report will be blank.

• The last page of the report provides invoice information, including the amount due to the school and the invoice number.
  o This same invoice number also will be referenced on the voucher from the State Comptroller, authorizing payment.
GAP Access - Payment Vouchers

• The voucher number will be referenced on the check (payment).

• The “WARRANT NO.” and “WARRANT DATE” fields will populate on the report after the State Comptroller has authorized payment for the voucher.

• For more information on tracking payments:
  o isac.org/faas/processes/state-comptrollers-website
Dual-Awarding Students with MTI & Golden Apple

• If a student qualifies for both Golden Apple and MTI the student must choose which program they would like to use
  o A student cannot receive the benefits of both programs in the same award year
  o ISAC will send the student a letter asking them to choose which program they want to accept -- MTI or Golden Apple
  o These letters include a deadline date to return the form

• If a student decides to change which program benefit he/she wants to receive:
  o First confirm that the student has been awarded the other program before cancelling a payment request that may have already been made
    ▪ For example, make sure that the student was awarded funds for MTI before cancelling a payment request for Golden Apple

• Program teaching obligations
  o Golden Apple requires a five-year teaching commitment
  o MTI has a one-year teaching commitment for each year that the scholarship is received
  o Both programs will convert to a loan that the student must repay if the teaching commitment is not met.

• Schools can find more information on both programs on ISAC’s website in the FAA area, in the Administrative Rules - isac.org/e-library/administrative-rules/2022-23-isac-rules.html, and in the program User Guides - isac.org/gap-access/.
Ways to View Students Awarded GA, SETTW & MTI

• Click on 🕵️‍♂️ icon
• This will take you to the Student Detail: Eligibility screen.
• Scroll down to view if the student was also awarded GA or SETTW
Using the “Sort” tab, you can create a list of students who have been awarded MTI, sorted by Award Date.

You can also create a list of students who have been awarded GA or SETTW.

After selecting your Sort options, click on the “List” tab to view the sorted list of students.

The MTI Student List Eligibility: View screen shows whether a student is also awarded GA or SETTW.

- Scroll all the way over using the scroll bar at bottom of screen.
### Dual-Awarding Students with MTI & Golden Apple

**MTI 2022-2023: Student Detail: Payments**

- Example of a student for which payment was requested for both the MTI & GA scholarships
- The college must CANCEL one of the scholarships
- This will be an audit finding if not corrected

<table>
<thead>
<tr>
<th>Terms</th>
<th>1 - Fall</th>
<th>2 - Spring</th>
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<tr>
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<td>Requested Amount</td>
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<td>Expanded Result</td>
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<tr>
<td>Expanded Result</td>
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</tbody>
</table>

**GA 2022-2023: Student Detail: Payment**
New ISAC Programs for 2022-23
New ISAC Programs Being Implemented in 2022-23

- ISAC is working to implement a few new programs throughout 2022-23
  - Administrative rules are available for each program
  - Web pages have been added to the Student and FAA sections of isac.org to provide information as it becomes available
  - Updates are 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
  - Was transitioned from the Illinois Department of Public Health to ISAC during 2022-23

- Post-MSW School Social Work PEL Scholarship Program & School Social Work & Municipal Loan Repayment Program
  - A $600 million appropriation will be split between these two programs
  - Applications are available online via the ISAC Student Portal

- Displaced Energy Worker Dependent Transition Scholarship
  - Created last year under Public Act 102-0662
  - Will be administered by ISAC with funding from the Department of Commerce and Economic Opportunity (DCEO)
  - Application will be available in early 2023
Community Behavioral Health Care Professional Loan Repayment (CBHCPLR) Program

• The 2023 fiscal year (July 1, 2022 - June 30, 2023) appropriation is $5,000,000

• Provides loan repayment assistance to qualified mental health and substance use professionals

• Intended to encourage recruitment and retention of those who practice in underserved or rural areas

• The amount of the annual award to qualified applicants to repay their student loan debt is based on their position and may be received for up to four years

• For more program information: isac.org/faas/other-programs/loan-repaymentforgiveness-programs/cbhcp.html

CBHCPLR Program Processing

• All applicants must submit a complete application to ISAC each academic year

• In order to be considered timely, the application must be submitted on or before the priority consideration date, which will be announced when the application is made available each year

• If the application is incomplete, a letter will be sent to the applicant to request the missing information

• Processing cannot take place prior to the date a complete application is received in ISAC's Deerfield office

• Qualified applicants will be sent a Notice of Eligibility letter from ISAC

• Application is accessible at: [isac.org/students/during-college/applying-for-financial-aid/applications/cbhcp/index.html](isac.org/students/during-college/applying-for-financial-aid/applications/cbhcp/index.html)
Nursing Education Scholarship Program (NESP)

• The 2023 fiscal year, July 1, 2022 – June 30, 2023, appropriation is $400,000,000

• The goal of the NESP Scholarship Program is to increase the number of nurses available for employment in Illinois

• Students pursuing a certificate in practical nursing, an associates degree in nursing, a hospital-based diploma in nursing or a bachelor’s or graduate degree in nursing are encouraged to apply

• Students who demonstrate the greatest financial need among qualified applicants, may be qualified to receive the Nursing Education Scholarship

• This scholarship provides financial aid anywhere from one to four years

• If awarded, you must begin full- or part-time employment as a licensed practical nurse, a registered nurse, or a nurse educator in Illinois within six months of graduating and remain employed for a period equivalent to the educational time supported by the scholarship
NESP Program Processing

- The 2022-23 application for this program is no longer being accepted

- IDPH and ISAC have worked in partnership to build the needed systems to transfer required documentation and integrate program administration into ISAC processing
  - Additional guidance and resources will be provided for FAAs as these activities progress

- Spring and summer term processing will utilize GAP Access, where schools will certify eligibility and request subsequent term payments
  - Spring term certification expected to be available in March

- For more program information: isac.org/isac-gift-assistance-programs/NESP/
Nursing Education Scholarship Program

RESOURCES > LAWS & RULES > PUBLICATIONS

The Nursing Education Scholarship Program (NESP) is now being administered by the Illinois Student Assistance Commission (ISAC). Inquiries about the program can be directed to ISAC at isac.studentservices@illinois.gov or 800.899.4722. Program information is available on ISAC’s website.

Purpose

The goal of the Nursing Education Scholarship Program is to increase the number of nurses available for employment in Illinois by offering scholarships to overcome financial barriers to education. The program provides financial assistance to qualified individuals pursuing a certificate in practical nursing, an associate degree in nursing, a hospital-based diploma in nursing, a baccalaureate degree in nursing, or a graduate degree in nursing.

General Program Information

The application submission period is March 1, 2021 through April 30, 2021. Applications will not be accepted after the submission deadline.

The scholarship pays for coursework within the nursing curriculum for which the recipient is funded; it does not pay for prerequisite coursework. The expense for coursework applied to another degree will not be paid nor will it be considered when determining eligibility for a stipend.

Students who have other scholarships or loan funds that require a service commitment that prevent the applicant from meeting the nurse employment or nurse educator employment obligation of this program may be considered for additional funds for coursework not covered by the scholarship.

Number of Years of Scholarship Funding

The number of years a recipient is eligible to receive funding is based on the certificate, diploma, or degree being pursued. The maximum years are:

<table>
<thead>
<tr>
<th>YEARS OF SCHOLARSHIP FUNDING</th>
<th>YEAR(S) OF SCHOLARSHIP ASSISTANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate in Practical Nursing</td>
<td>One Academic Year</td>
</tr>
<tr>
<td>Associate Degree in Nursing</td>
<td>Two Academic Years</td>
</tr>
<tr>
<td>Hospital-based Diploma in Nursing</td>
<td>Three Academic Years</td>
</tr>
<tr>
<td>Baccalaureate Degree in Nursing</td>
<td>Four Academic Years</td>
</tr>
<tr>
<td>Graduate Degree in Nursing</td>
<td>Five Academic Years</td>
</tr>
<tr>
<td>Graduate Degree in Nursing (to become a Nurse Educator)</td>
<td>Three Academic Years</td>
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</table>

Scholarship Amounts

Full-time students may receive the following for an academic year:

<table>
<thead>
<tr>
<th>INSTITUTION</th>
<th>SCHOLARSHIP AMOUNTS</th>
<th>TOTAL (ESTIMATE)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TUITION AND FEES (ESTIMATE)</td>
<td>STIPEND (ESTIMATE)</td>
</tr>
<tr>
<td>Public Colleges or Universities</td>
<td>$12,249.75</td>
<td>$4,875.00</td>
</tr>
<tr>
<td>Community College, Hospital-based School of Nursing, or School of Practical Nursing</td>
<td>$3,449.25</td>
<td>$4,875.00</td>
</tr>
</tbody>
</table>

Note: Actual awards may be less depending on other forms of financial aid students receive. Students attending private colleges and universities receive the same amount of assistance as.
Resources

- Nursing Education Scholarship Program Online Application
- Illinois Approved Nursing Education Programs

Laws & Rules

- Administrative Code
- Nursing Education Scholarships

Publications

- Nursing Education Scholarship Program FAQs

Junction Committee on Administrative Rules

ADMINISTRATIVE CODE

TITLE 77: PUBLIC HEALTH
CHAPTER 1: DEPARTMENT OF PUBLIC HEALTH
SUBCHAPTER G: GRANTS TO DENTAL AND MEDICAL STUDENTS
PART 897 NURSING EDUCATION SCHOLARSHIPS

The General Assembly’s Illinois Administrative Code database includes rules that have been permanently adopted. This menu will point out the Section rule (valid for a maximum of 150 days, usually until replaced by a permanent rule). The emergency rulemaking is linked through the notation that follows the menu.

SUBPART A: GENERAL PROVISIONS

- Section 597.10 Definitions
- Section 597.20 Referenced Materials
- Section 597.30 Administrative Hearings

SUBPART B: ELIGIBILITY AND APPLICATION

- Section 597.100 Eligibility
- Section 597.105 Notification
- Section 597.110 Application
- Section 597.115 Scholarship Renewal (Repealed)

SUBPART C: AWARD OF SCHOLARSHIPS

- Section 597.200 Scholarship Description
- Section 597.210 Determination of Financial Need
- Section 597.220 Selection Criteria for Award of Scholarships
- Section 597.240 Student Enrollment and Institutions’ Obligations
- Section 597.245 Determination of Continuous Attendance Requirement
- Section 597.246 Waiver of Continuous Attendance Requirement

SUBPART D: TERMS OF PERFORMANCE

- Section 597.300 Grant Agreement
- Section 597.310 Repayment of Scholarship
Post-MSW School Social Work Professional Educator License Scholarship Program

• The 2023 fiscal year, July 1, 2022 – June 30, 2023 appropriation is $600,000,000

• Designed to encourage LSWs and LCSWs to work as social workers in Illinois preschools, elementary schools and high schools.

• Promotes the diversity in the profession to meet the diversity of the parents and students they will serve

• Provides minority students with greater access to positive minority role models

• Each scholarship pays tuition and mandatory fees for an academic year (including summer) at Illinois Public Universities

• A total of 250 scholarships may be awarded each year

• College will certify student eligibility and submit payment requests in GAP Access on behalf of the student
  ○ Payment will be provided to the college from the State Comptroller’s Office
Post-MSW School Social Work Professional Educator License Scholarship Program Processing

• The application/promissory note is available in the student portal

• The online application has built-in edits to prevent errors and will send an immediate e-mail to the applicant when their application has been received

• An e-mail will also be sent from ISAC for incomplete applications, explaining the reasons and how to resolve the issue

• Application/Promissory Note is accessible at: [https://studentportal.isac.org](https://studentportal.isac.org)

• Student information page: [isac.org/students/during-college/types-of-financial-aid/scholarships/P-MSSWSP.html](https://isac.org/students/during-college/types-of-financial-aid/scholarships/P-MSSWSP.html)

• For more program information: [isac.org/isac-gift-assistance-programs/SWSP](https://isac.org/isac-gift-assistance-programs/SWSP)
Post-MSW School Social Work Professional Educator License Scholarship Program Processing Updates

- February 28, 2023 is the priority application consideration date

- Awards will cover all terms of the 2022-23 academic year *(fall 2022, spring 2023, and summer 2023)* for which the applicant is eligible and enrolled

- Complete online applications received after February 28 will be considered only if funds remain after all timely complete applicants have been awarded

- Students who meet the program's eligibility requirements should be encouraged to apply as soon as possible

- Effective January 5, 2023 administrative rules are available, and these replaced the emergency rules and amendments that had been in effect since August 8, 2022

Displaced Energy Worker Dependent Transition Scholarship Program

• The 2023 fiscal year, July 1, 2022 – June 30, 2023 appropriation is $100,100,000

• Provides scholarship assistance to children (including adopted and stepchildren) of eligible displaced energy workers

• Designed to support students who are deterred from attending or completing an educational program at an Illinois institution due to a parent’s layoff from a retiring power plant or a closing coal mine

• Pays tuition and fee costs at a public college or community college for the equivalent of one calendar year, including summer, for undergraduate or graduate study

• Applicant does not need to be a resident of Illinois at the time of enrollment; however, the award is limited to the cost of in-district and in-state tuition and fees.

• The award amount will not exceed the cost of tuition and fees at the institution.

• For more program information: https://www.isac.org/isac-gift-assistance-programs/DEWDTSP/

Displaced Energy Worker Dependent Transition Scholarship Program Processing

- An application must be submitted each time the student is requesting an award
  - FAFSA must also be completed

- First time applicants will include biographical information regarding the eligible displaced energy worker
  - Once eligibility is established regarding the displaced worker, it is established for all subsequent applications

- ISAC is currently working on the application process and will provide more information when the application becomes available

- Student information page: [isac.org/students/during-college/types-of-financial-aid/scholarships/DEWDTSP.html](http://isac.org/students/during-college/types-of-financial-aid/scholarships/DEWDTSP.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”.

- 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 IGL Grant and IUS programs
isac.org/e-library/
isac.org/e-library/partner-e-messages-and-newsletters/faa-e-messages/index.html

**FAA e-Messages**

Messages are organized according to the subscription group(s) to which they were sent, with the most recent message appearing at the top of each section.

**Financial Aid Directors**

- **Don't Forget – Submit Your CCE Conference Proposal**
  02/09/2023

- **Upcoming Important Dates from ISAC**
  01/30/2023

- **Don't Delay – Register for Success Network Conference**
  01/25/2023

- **2023 CCE Conference: Save the Date & Call for Proposals**
  01/20/2023

- **ISAC Monthly Webinars for FAAs**
  01/17/2023

- **2022-23 Spring-Term Claims & Benefit Usage Submission**
  01/09/2023
2023-24 Award Year
Timeline -- Preparing for 2023-24 MAP

• January – May 2023
  o Spring legislative session of the 103rd General Assembly
  o Scheduled to adjourn by May 19
  o ISAC analysis of budget proposals, as well as other legislative proposals
• February 2023
  o Governor’s State of the State and Budget Address, delivered on February 15
  o Proposed $100 million increase for MAP
• April 2023
  o Collection of 2023-24 budget data from MAP-approved colleges begins
• May 2023
  o ILASFAA MAP Formula Committee Meeting to discuss recommendations for the Recompute Formula
  o Expect to have a finalized state budget (approved by the General Assembly and the Governor)
• June 2023
  o Budget data collection process completed
  o Propose MAP Recompute Formula to ISAC Commissioners for approval on June 22
  o Approved maximum award amount for the 2023-24 award year announced
    ▪ Cannot exceed maximum in statute
  o Recompute Formula implemented and new award amounts announced, if applicable
2023-24 ISAC Program Applications

• Illinois Special Education Teacher Tuition Waiver (SETTW)
  o 2023-24 online application is available
  o Priority application consideration date is March 1, 2023
  o Application can be accessed online in the ISAC Student Portal
  o Complete applications received after March 1 will be considered only if available tuition waivers remain after all timely complete applicants have been awarded
  o At this time, student data related to the 2023-24 SETTW application is not appearing for colleges in the SETTW system. This page will be updated when student data becomes available for colleges to view.

• Minority Teachers of Illinois (MTI) Scholarship Program
  o 2023-24 online application is available
  o Priority consideration date is March 31, 2023
    ▪ 2023-24 FAFSA or, if applicable, the 2023-24 Alternative Application must also be received by March 31, 2023 to be considered timely
  o Complete applications received after March 31 will be considered only if funding remains after all timely complete applicants have been awarded

• Nursing Education Scholarship Program (NESP)
  o The application will be available March 1, 2023
  o Program administration for 2023-24 and beyond will take place in ISAC’s GAP Access system
2023-24 Budget Reporting

• The annual budget reporting process will begin in early April

• We will provide more information in the March monthly webinar and will also offer Budget Reporting webinars in April
Federal Student Aid
2023-24
FAFSA® Simplification Act Changes for Implementation in 2023-24

• Detailed guidance was provided in Dear Colleague Letter (DCL) GEN-22-15, issued on November 4, 2022

• Topics covered include:
  o Cost of Attendance
    ▪ What changed and what remained the same
  o Definitions
    ▪ Updated definitions of commonly used COA terms
    ▪ Special Populations
    ▪ Confined or incarcerated students COA
  o Professional Judgement
    ▪ Special Circumstances-Unusual Circumstances
  o Unaccompanied Homeless Youth
  o Pell Grant LEU Restoration
  o Pell Grant Eligibility for Incarcerated Students
  o Changes to FAFSA form
  o Q & A section
Cost of Attendance (COA) for 2023-24

The FAFSA Simplification Act (116 Pub. L. 260, Division FF, Title VII) and the Consolidated Appropriations Act, 2022 (117 Pub. L. 103, Division R) jointly modify the COA components and consumer information pertaining to those components.

The revisions provide more clarity and detail to individual COA components, and institutions must implement them for the 2023-24 Award Year.
Cost of Attendance (COA) for 2023-24

What has changed?

• Language regarding costs for rental or purchase of equipment, materials, or supplies has moved out of the definition of “tuition and fees” and into a broader definition of “books, course materials, supplies, and equipment.”

• Transportation expenses may include transportation between campus, residences, and a student’s place of work.

• “Room and board” are now known as “food and housing,” although the meaning of the terms remains the same. Food and housing are grouped as “living expenses.”

• Living expense categories now break out costs associated with specific housing and food situations and require standard allowances within certain categories, such as on or off campus and with or without a meal plan.

• Institutions may no longer include loan fees for non-Federal student loans borrowed by students.
What has changed? (Continued)

- The costs of obtaining a license, certification, or first professional credential are no longer restricted to a one-time allowance.

- “Course materials” and “the cost of obtaining a license, certification, or a first professional credential” were added to the types of expenses that an institution may include in a confined or incarcerated individual’s COA.

- The types of expenses that an institution may include in the COA for a student who is enrolled less than half time has been broadened to include components not otherwise prohibited by the law. For example, an allowance for students in work related to a cooperative education program is permissible because that COA element [HEA Sec. 472(a)(12)] does not exclude less-than-half-time students, while miscellaneous personal expenses [HEA Sec. 472(a)(4)] are not includable, as noted below.
Cost of Attendance (COA) for 2023-24

What remains the same?

• A student must be enrolled at least half time for miscellaneous personal expenses to count in the student’s COA.

• There were no changes to the definitions of the following components: study abroad expenses, cooperative education expenses, dependent care expenses, and disability-related expenses.

• There were no substantive changes to the COA components for students engaged in correspondence study or distance education under section 472(a)(6) and section 472(a)(11) of the HEA, respectively.
Definitions COA terms

- The definitions of terms commonly used in determining COA can be found in Dear Colleague letter GEN 22-15

- 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.
Definitions of Commonly Used COA Terms

Below we provide the updated definitions of commonly used COA terms based on the statutory changes in section 472 of the HEA, incorporating the changes described previously for the 2023-24 award year:

• **Tuition and fees**—An amount normally assessed a student carrying the same academic workload, as determined by the institution.

• **Books, course materials, supplies, and equipment**—An allowance for books, course materials, and equipment, which must include all such costs required of all students in the same course of study, including a reasonable allowance for the rental or upfront purchase of a personal computer, as determined by the institution.

• **Transportation**—An allowance, as determined by the institution, which may include transportation between campus, residences, and place of work.

• **Miscellaneous personal expenses**—An allowance, as determined by the institution, for a student attending the institution on at least a half-time basis.
Definitions of Commonly Used COA Terms

• **Living expenses**—An allowance for food and housing costs, as determined by the institution, to be incurred by the student attending the institution on at least a half-time basis, including:
  
  o A standard food allowance that provides the equivalent of three meals each day, regardless of whether a student chooses institutionally owned or operated food services (i.e., board or meal plans). Institutions must provide an allowance for purchasing food off campus for a student that does not elect institutionally owned or operated food services.

  o Housing allowances for students residing in institutionally owned or operated housing with or without dependents must be based on the average or median amount assessed to such residents for housing charges, whichever is greater.

  o Housing allowances for students living off campus must include rent or other housing costs.

  o For dependent students living at home with parents, institutions must include a reasonable standard allowance for living expenses that is not zero.

  o For students living in housing on a military base or for which they receive a basic allowance under section 403(b) of title 37, United States Code, institutions must include a reasonable allowance for food on-campus or off-campus but cannot include housing costs.

  o For all other students, institutions must include a reasonable allowance based on expenses incurred by such students.

  o Review each living expense category above to ensure that you properly capture all required categories in your COA policy.
Definitions of Commonly Used COA Terms

- **Study abroad expenses**—An allowance for reasonable costs, as determined by the institution, for a student in a study abroad program approved for credit by the home institution.

- **Cooperative education costs**—An allowance for reasonable costs, as determined by the institution, associated with such employment for a student engaged in a work experience under a cooperative education program.

- **Dependent care**—An allowance based on the estimated actual expenses incurred for dependent care, based on the number and age of such dependents.
  
  - Such allowance must not exceed the reasonable cost in the community in which such student resides for the kind of care provided; and
  
  - The period for which dependent care is required includes, but is not limited to, class-time, study-time, field work, internships, and commuting time.
Definitions of Commonly Used COA Terms

• **Disability-related expenses**—An allowance, as determined by the institution, for expenses associated with a student’s disability, including special services, personal assistance, transportation, equipment, and supplies that are reasonably incurred and not provided for by other agencies.

• **Federal student loan fees**—An allowance for the cost of any Federal student loan fee, origination fee, or insurance premium charged to the student or the parent of the student. The allowance—
  o May be actual or average costs, as appropriate; and
  o May not include the cost associated with non-Federal loans.

• **Professional licensure, certification, or a first professional credential**—An allowance for the costs associated with obtaining a license, certification, or a first professional credential, for a student in a program that prepares them to enter a profession that requires such a qualification.
COA for Special Populations

The following student populations have cost of attendance requirements based on their unique situations.

• Cost of attendance for students engaged in a program of **study by correspondence** must include tuition and fees and, if required, books, course materials, supplies, and equipment. A school may also include an allowance for travel, housing, and food costs incurred specifically for a period of residential training.

• The cost of attendance for **confined or incarcerated students** may only include:
  - Tuition and fees
  - Books, course materials, supplies, and equipment
  - The cost of obtaining a license, certification or a first professional credential

• The cost of attendance for students enrolled **less than half-time**:
  - Must include any components (tuition and fees; books, course materials, supplies, and equipment; and transportation) normally applied to students who are enrolled less than half-time, along with any other components (disability expenses, etc.) that are not expressly prohibited for less than half-time students (e.g., miscellaneous personal expenses).
  - May also include an allowance for living expenses, including food and housing costs, for up to three semesters, or the equivalent, with no more than two semesters being consecutive.

• For students receiving all or part of their instruction by means of **distance education**, no distinction may be made with respect to the mode of instruction in determining costs.
  - For example, an institution may not eliminate the transportation cost component for a distance education student.
COA – Other Changes

- The Act expands existing consumer information requirements by explicitly stating that each institution must make COA information publicly available on its website. The disclosure must include a list of all COA elements and must appear on any portion of the website that describes tuition and fees.

- Previously the Department was not permitted to establish regulations on cost of attendance. Under the Act, the Department may now regulate the cost of attendance, except for tuition and fees, and may choose to do so in the future to provide clarity in this area.
Professional Judgement 2023-24

The FAFSA Simplification Act distinguishes between different categories of professional judgment by amending section 479A of the HEA.

- **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.

- A student may have both a special circumstance and an unusual circumstance. Financial aid administrators (FAAs) may make adjustments that are appropriate to each student’s situation with appropriate documentation.
Professional Judgement 2023-24

What has changed?

• Institutions may not maintain a policy of denying all professional judgment requests but must consider all such requests. Therefore, institutions must develop policies and processes for reviewing those requests.

• Institutions must disclose publicly that students may pursue an adjustment based on special or unusual circumstances.

• Institutions may use a dependency override determination made by a financial aid administrator at another institution in the same or a prior award year.
Professional Judgement 2023-24

*What remains the same?*

- Institutions must make and document professional judgment determinations on a case-by-case basis without regard to how broadly an event may affect its student population.

- In making case-by-case determinations, the FAA must substantiate the student’s circumstance with supporting documentation.

- Previous reasons for exercising professional judgment (e.g., unemployment, dislocated worker, school tuition expenses) are still allowable.

- A dependency override for unusual circumstances is considered unique from a determination of independence for homeless youth or at-risk homeless youth.
Pell Lifetime Eligibility Used (LEU)

- Allows for restoration of Lifetime Eligibility Used (LEU) regarding loan discharges associated with 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:

• Final regulations were published on October 28, 2022 and go into effect on July 1, 2023
Federal Student Aid Handbook

- In an Electronic Announcement (ID: General-23-03) published on January 11, 2023, ED announced that the 2023-24 Federal Student Aid Handbook will be reorganized.

- There will be 3 new volumes for a total of 9 volumes.

- New volumes 7, 8 & 9 are being designed to consolidate information found in two or more handbook volumes into one central location for easier use:
  - Volume 7: The Federal Pell Grant Program and Iraq and Afghanistan Service Grants
  - Volume 8: The Direct Loan Program
  - Volume 9: The Teach Grant Program

- The changes will be implemented as each volume of the 2023-24 FSA Handbook is released.
The Federal Student Aid Handbook consists of the Application and Verification Guide, nine numbered volumes, and appendices. Each volume and appendix is posted on Federal Student Aid’s Knowledge Center.

https://fsapartners.ed.gov/knowledge-center

February 1, 2023 - ED announced the availability of Volume 1 – Student Eligibility of the 2023-2024 Federal Student Aid Handbook

Access to the PDF or Digital version can be found on the FSA Partners website.

(GENERAL-23-06) Volume 1 – Student Eligibility [2023-2024 Federal Student Aid Handbook]
FSA Partner Connect

• Are you getting e-mails from FSA Knowledge Center regarding FSA Updates?

• The following link will take you to the FSA Knowledge Center page https://fsapartners.ed.gov/knowledge-center

• At the bottom of the home page, you will find “Knowledge Center Subscription”
New Knowledge Center Subscription

Please enter your email address and select one or more Subscription Options in order to complete your Knowledge Center Subscription.

Email Address *
This field is required.

Subscription Options

- Weekly Knowledge Center Update
  The weekly email summary will include all the updates to the Knowledge Center from that week. If there are no updates, FSA Partner Connect will send an email stating that there are no updates.

- Daily Knowledge Center Update
  The daily email summary will include all updates to the Knowledge Center from that day. If there are no updates, no email will be sent.

[Submit]
Confirmation of E-Mail from FSA

Knowledge Center Subscriptions Email Confirmation

Dear Subscriber:

We need you to confirm your request to subscribe to FSA Partner Connect Knowledge Center email summaries.

Yes, subscribe me

⚠️ If you received this email by mistake, ignore and delete it. By ignoring the email, you will not be subscribed to Knowledge Center email summaries.
FAFSA Simplification
Federal Student Aid
2024-25
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
  o See breakout session B09 from FSA Conference for more information regarding the use of Federal Tax Information--
  o fsaconferences.ed.gov/conferences/library/2022/ppts/2022FSACnfSessionB09.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
  - 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
  - fsaconferences.ed.gov/conferences/library/2022/ppts/2022FSACnfSessionBO15.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 student's FAFSA during the DDX process.

- This information will be reported for a **calendar year** and **not an academic year**

- More information will be forthcoming
2022 Virtual FSA Training Conference

Electronic Announcement -- Feb. 17, 2023

• On March 3, 2023, the event platform for the 2022 Virtual FSA Training Conference will no longer be available.

• After March 3, you will not have the ability to print certificates of attendance.

• All video recordings of the conference sessions and PowerPoint presentations will be available after March 3 on the FSA Conferences website at fsaconferences.ed.gov.

• All sessions can be accessed without the original log-in credentials required on the conference platform.

The On-Demand platform will be open until March 3, 2023.
Session Presentations

General Sessions

1. Welcome and Opening Remarks
   Presented by FSA CIO Richard Cordray

2. Keynote Address by the U.S. Department of Education
   Presented by James Kvaal

3. Keynote by the U.S. Under Secretary of Education
   Presented by James Kvaal

4. Federal Update
   Presented by David Musser and Annmarie Weisman
   Presentation forthcoming

5. Federal Update: FAFSA® Simplification
   Presented by Melanie Storey
   Presentation forthcoming

Breakout Sessions

1. Understanding Prison Education Programs for Confined or Incarcerated Individuals
   Presented by Benedict Dorsey
   Download Presentation

2. Surviving a Cyber Attack: Does Your Institution Have What It Takes?
   Presented by Margaret Glick
   Download Presentation

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

4. Update on Auditing Requirements for School Title IV Programs and Higher Education Emergency Relief Funds
   Presented by Amy Bales and Mark Priebe
   Download Presentation

5. Maintaining Your Institutional Eligibility
   Presented by Susan Bowder and Kai Kimbrough
   Download Presentation

6. Academic Calendars
   Presented by Byron Scott
   Download Presentation

7. Title IV Administration for Non-term Credit Hour Programs
   Presented by Byron Scott
   Download Presentation

   Presented by Greg Martin and David Musser
   Download Presentation

9. FAFSA® Simplification: Use of Federal Tax Information
   Presented by Dennis Kramer
   Download Presentation

10. National Student Loan Data System (NSLDS) Website and Capabilities Demo – PART 1
    Presented by Tina Hansen
    Download Presentation

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

Registration Information

2022 Virtual Conference Platform now open.
Register here
FSA Wednesday Webinar Series

• Dear Colleague Letter ANN-22-09

• The webinars are free to attend

• Registration is not required, but the webinars are limited to 10,000 attendees each session

• The DCL provides information about each webinar and also provides guidance on how to add each webinar to your calendar as a reminder
Wednesday Webinar Series Schedule and Links, Winter–Spring 2023

All sessions are scheduled for 1–3 p.m. Eastern time (ET). There may be a difference between your local time and Eastern time. To determine local time and its Eastern time zone equivalent, go to [time.gov](http://time.gov).

See below for complete details about each webinar, including the link to join on the day of the event.

- Administering Disbursements
- Pell Grant Recalculations for Modules
- Verification 2022–23 and 2023–24
- Federal Update
- SAP Essentials
Dates to Remember...
Dates to Remember…

• March 3 -- Priority consideration date to submit interest session proposals for the 2023 College Changes Everything® (CCE) Conference
  o Complete session proposal forms submitted online by Friday, March 3, 2023 will receive priority consideration.
    ▪ isac.org/e-library/partner-e-messages-and-newsletters/faa-e-messages/eLibrary-faa-2023-0120.html

• March 8 -- Illinois Education and Career Success Network Conference
  o This one day, in-person conference will deliver content and interactive opportunities centered on advancing equitable postsecondary attainment, as well as celebrating our 10th anniversary as a Network
  o Being held at Moraine Valley Community College in Palos Hills, Illinois
  o Registration fee $35
    ▪ isac.org/e-library/partner-e-messages-and-newsletters/faa-e-messages/eLibrary-faa-2023-0125.html

• July 13 -- College Changes Everything® (CCE) Conference
  o In-person event will be held at the Tinley Park Convention Center
Illinois Association of Student Financial Aid Administrators (ILASFAA)

• Mark your calendar for the upcoming 2023 ILASFAA Annual Conference
  o *ILASFAA Perks* will be an in-person event
  o March 13-15 at the I-Hotel Illinois Conference Center in Champaign, IL
  o Registration for the conference is open at: ilasfaa.org/2023_ilasfaa_annual_conference.php#Registration
  o Registration closes on March 13

• Due to high demand the I-Hotel is now fully booked for the conference. Here are a few hotel options close to the conference center:
  o Home2 suites (3 min from the I-Hotel)
  o Hilton Garden Inn (4 min from the I-Hotel)
  o Homewood Suites (4 min from the I-Hotel)
ILASFAA Conference - ISAC Sessions

• ISAC staff will be presenting the following sessions at the conference
  o ISAC Update General Session
  o Cybersecurity & GAP Access
  o Overview of New ISAC Programs
  o GAP Access Overview
  o Ask ISAC Panel
  o Illinois First-Generation Scholars
  o Preparing for Federal Loan Repayments to Resume: What You and Your Students Need to Know
  o The New PSLF Regulations: What They Mean for You

• Visit ilasfaa.org/2023_ilasfaa_annual_conference.php for the full agenda, session dates and times, etc.
Dear Colleagues,

While at the ILASFAA conference in March, ISAC is hosting a networking event for prospective employers to meet ISACorps members completing their service with ISAC in May, and with ISACorps alumni who are ready to make a career move.

If there will be vacancies in your department, we invite you to attend the event to share information about your openings on Monday, March 13th from 5:00-6:30pm.

Please RSVP at this link if you would like to promote opportunities within your department at your institution.

Thanks, Sam
Sam Nelson
Director of Network Development
Illinois Student Assistance Commission.
Other Upcoming ISAC Events

• FAA Monthly Webinars
  o Wednesday, March 29, 2 p.m.
  o Wednesday, April 26, 2 p.m.

• Commission Meetings
  o Thursday, April 13
  o Thursday, June 22
ISAC Contact Information

School Services
866-247-2172
isac.schoolservices@illinois.gov

ISAC Call Center – Student Services
800-899-4722
isac.studentservices@illinois.gov

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