ISAC FAFSA SYMPOSIUM

Avoid the wrench:

Preparing for Verification Before Students Begin the FAFSA

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Agenda

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Organization

Tracking Tool

Sample Scenarios

About me

Director of Teacher Support Y1/Y2 at OneGoal

Teacher for 15 years (English, Senior Seminar, OneGoal)

- 11 years in Chicago Public Schools
- 10 years of Postsecondary Work
- 5 years leading our Postsecondary Team

I just said verification. Which Beyonce are you?

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FAFSA Timeline

Now!

Create FSA IDs

All students and parents will need an FSA ID.

December

Complete the FAFSA

December - April

March

Verification

Students will be notified via email.

March/ April

Award Letter Analysis

Some schools process aid faster than others.

May 1

Decision Day!

Let’s make those deposits!

Sample Scenarios

Jennifer’s parents are unmarried, but living together. Both parents worked in 2022, and they both filed Head of Household.

Arika’s Grandmother has legal custody of her, so she brought in her Grandmother’s 2022 taxes to complete the FAFSA.

Keon’s parents didn’t file taxes in 2022.

Getting Organized

Create a FAFSA project plan

- Goals and objectives
- Success metrics
- Stakeholders and roles
- Timeline and schedule
- Communication plan

Getting Organized

Goals and objectives

Examples:

- Students and families will have the support they need to complete financial aid applications.
- Students will have access to the financial aid and scholarships resources to help them pay for their postsecondary plan.

Getting Organized

Success Metrics

Examples:

- 90% of eligible students will complete the FAFSA by March 1, 2024.
- 50% of families attend the Information Session
- 80% of appointments are booked for three FAFSA completion workshops on Saturdays

Getting Organized

Stakeholders and roles

Examples:

- Stakeholders: Counselor One, Counselor Two, Assistant Principal
  - **Counselor One**: Plan for info session, schedule parent meetings, attend Saturday sessions, track progress for caseload
  - **Counselor Two**: Plan for Saturday sessions, schedule parent meetings, attend Saturday sessions
  - **Assistant Principal**: Attend info session, send out parent newsletter

Getting Organized

Timelines and Schedules:

Examples:

- FAFSA Info Night will be on November 14. The presentation is due Nov 7 for the team to review.
  - Great time to collect information!
- 20% of students will be done with FAFSA by January 15.
- Counselors will update the spreadsheet every Thursday, and the AP will review data on Fridays.

Getting Organized

Communication Plan:

Examples:

- Updates on FAFSA completion will be shared at the beginning of each PLT.
- Parents will be notified on October 30 about the Info Session. They will be notified via email, social media and robo-calls.

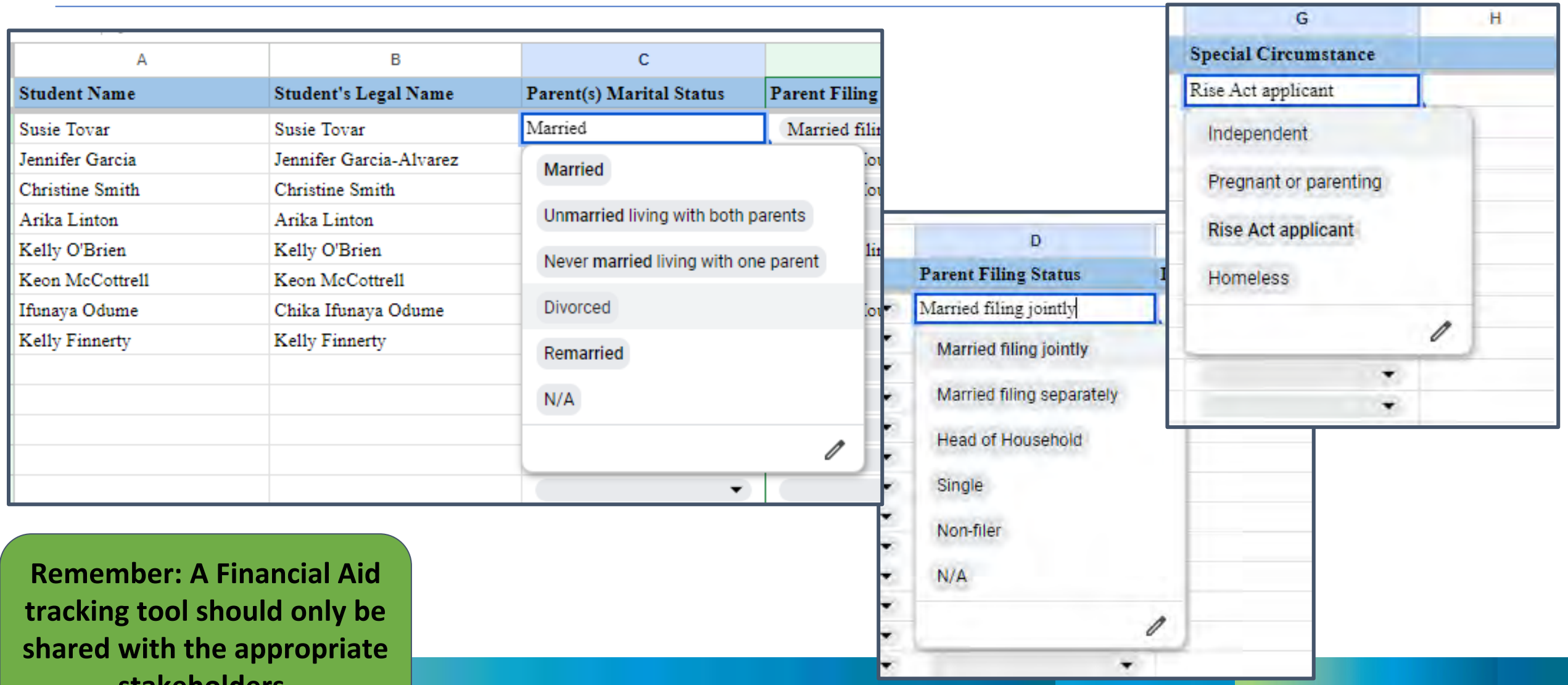
Organization Tools

Google Sheets (or Excel) is your friend!

- Create a tool that works for your students.
- Share with the appropriate stakeholders
- Set norms
  - Who is entering information?
  - When is information being entered?

Remember: you are not allowed to store students' or parents' FSA IDs and passwords. Help students and families find a safe way to store this information.

Sample Tool



Remember: A Financial Aid tracking tool should only be shared with the appropriate stakeholders.

Conditional Formatting is your friend.

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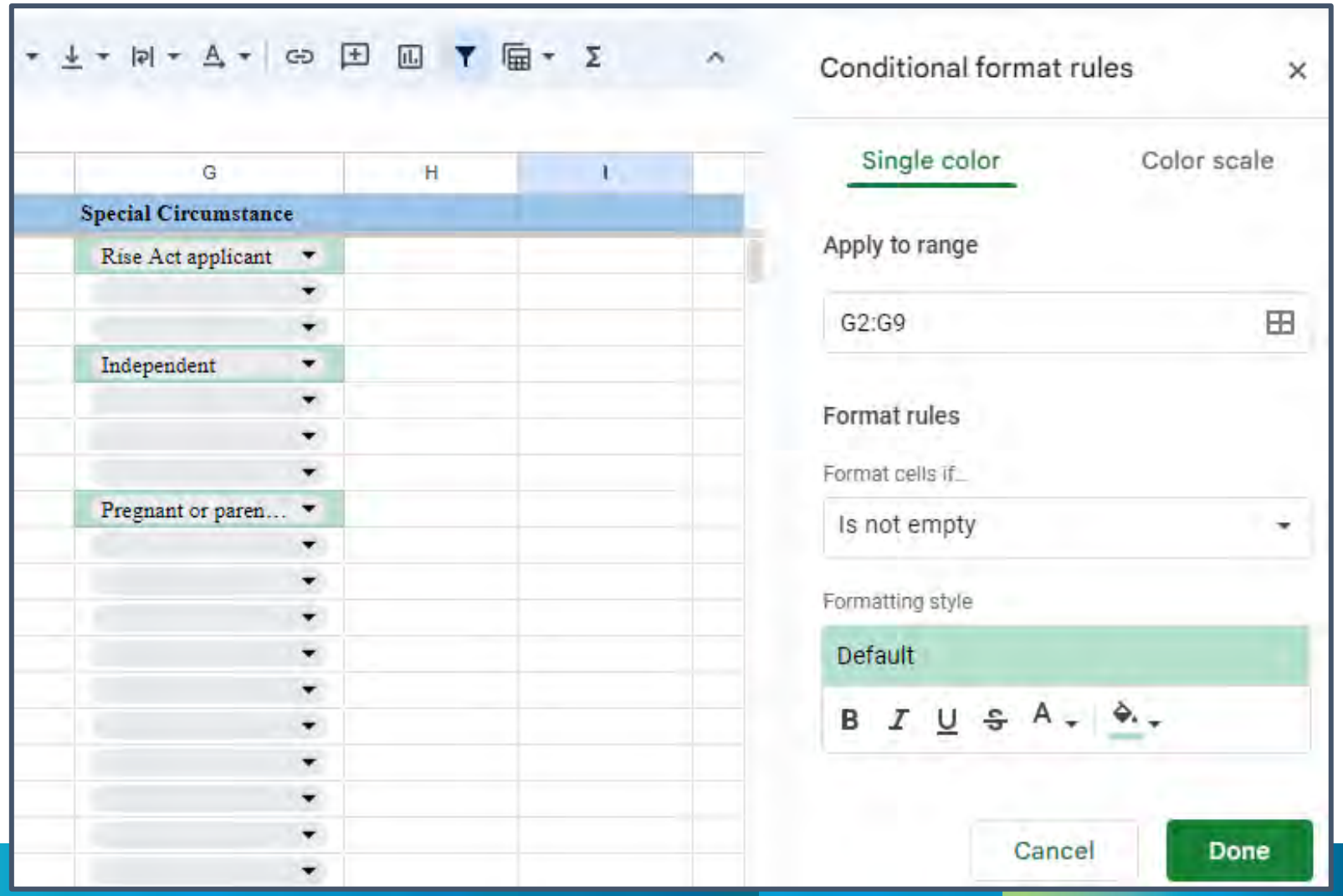
Date Processed	SAI
1/15/2024	$0
12/20/2023	$237
12/15/2023	-$120
1/15/2024	
2/1/2024	$1,200
2/2/2024	



Other ways to use Google Sheets

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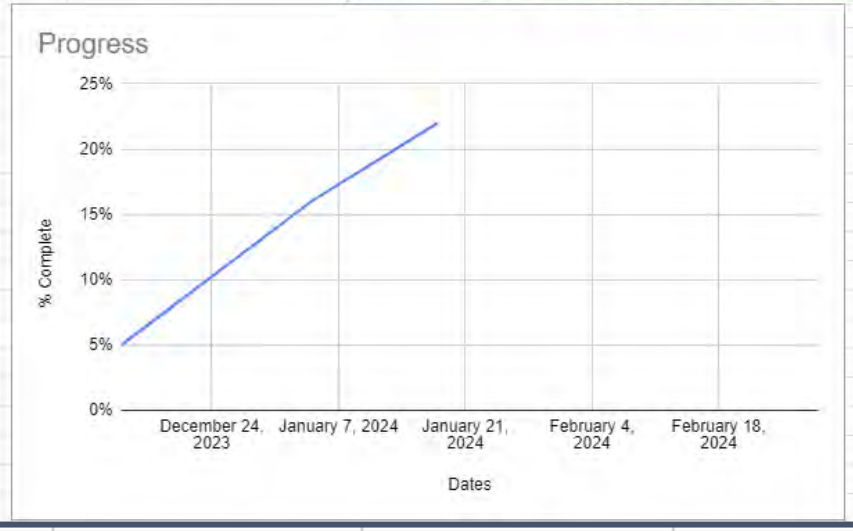
Tracker ▾ | Saturday Session Sign Up ▾ | Benchmark Tracker ▾

Dates	% Complete
December 14, 2023	5%
January 4, 2024	16%
January 18, 2024	22%
February 1, 2024	
February 15, 2024	
February 29, 2024	

GOAL 90% of eligible students will complete the FAFSA by March 1st.



A	B	C				
	December 16 Lee	December 16 Caplan	January 16 Lee	January 15 Caplan	January 20 Lee	January 20 Caplan
9:00						
9:45						
10:30						
11:15						
12:00						

Sticky Situations

It is better to do a FAFSA correctly than make corrections.

Fix errors before submitting.

Remember: Any information will be deleted after the account has been inactive for 45 days.

What would you do?

Jennifer’s parents are unmarried, but living together. Both parents worked in 2022, and they both filed Head of Household.

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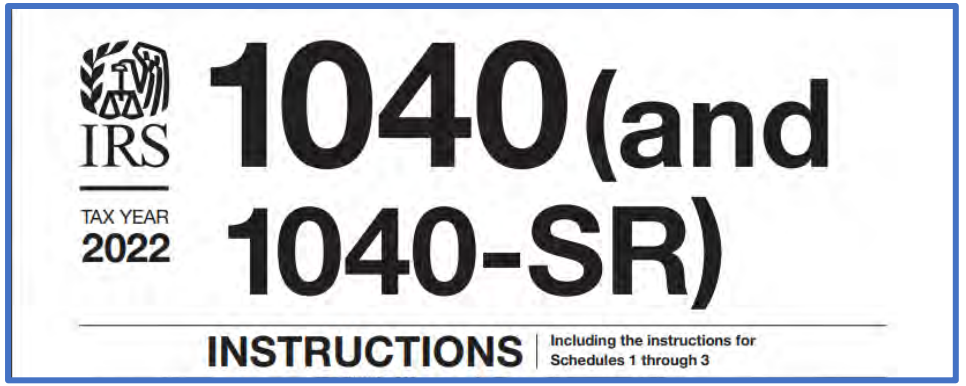

tl:dr

You are a Project Manager!

The information you gather about your students before completing the FAFSA will help you minimize verification issues or prepare for verification.

Completing accurately and correctly > Completing quickly without the correct information

Use the resources available to you.

Interested in learning more about OneGoal?

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- OneGoal partners with schools & districts across Illinois
- Visit our website: **OneGoal.org**
- Utilize & Share: **GradPlan.org**
  - Student-facing website full of resources, tools, and information to help develop a plan to navigate life after high school no matter where they are in their journey

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Thank you!

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