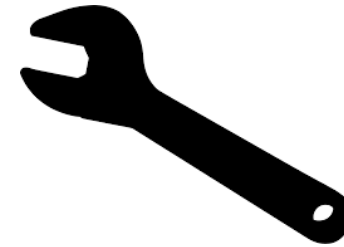




ISAC
FAFSA
SYMPOSIUM

Avoid the wrench:

Preparing for Verification Before
Students Begin the FAFSA



Vanessa Lee
OneGoal Director of Teacher Support

Agenda

Organization

Tracking Tool

Sample Scenarios

About me

Director of Teacher Support Y1/Y2 at OneGoal

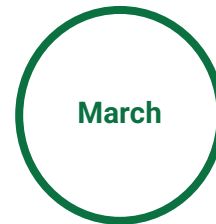
Teacher for 15 years (English, Senior Seminar, OneGoal)

- 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?



FAFSA Timeline



Create FSA IDs

All students and parents will need an FSA ID.

Complete the FAFSA

December - April

Verification

Students will be notified via email.

Award Letter Analysis

Some schools process aid faster than others.

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

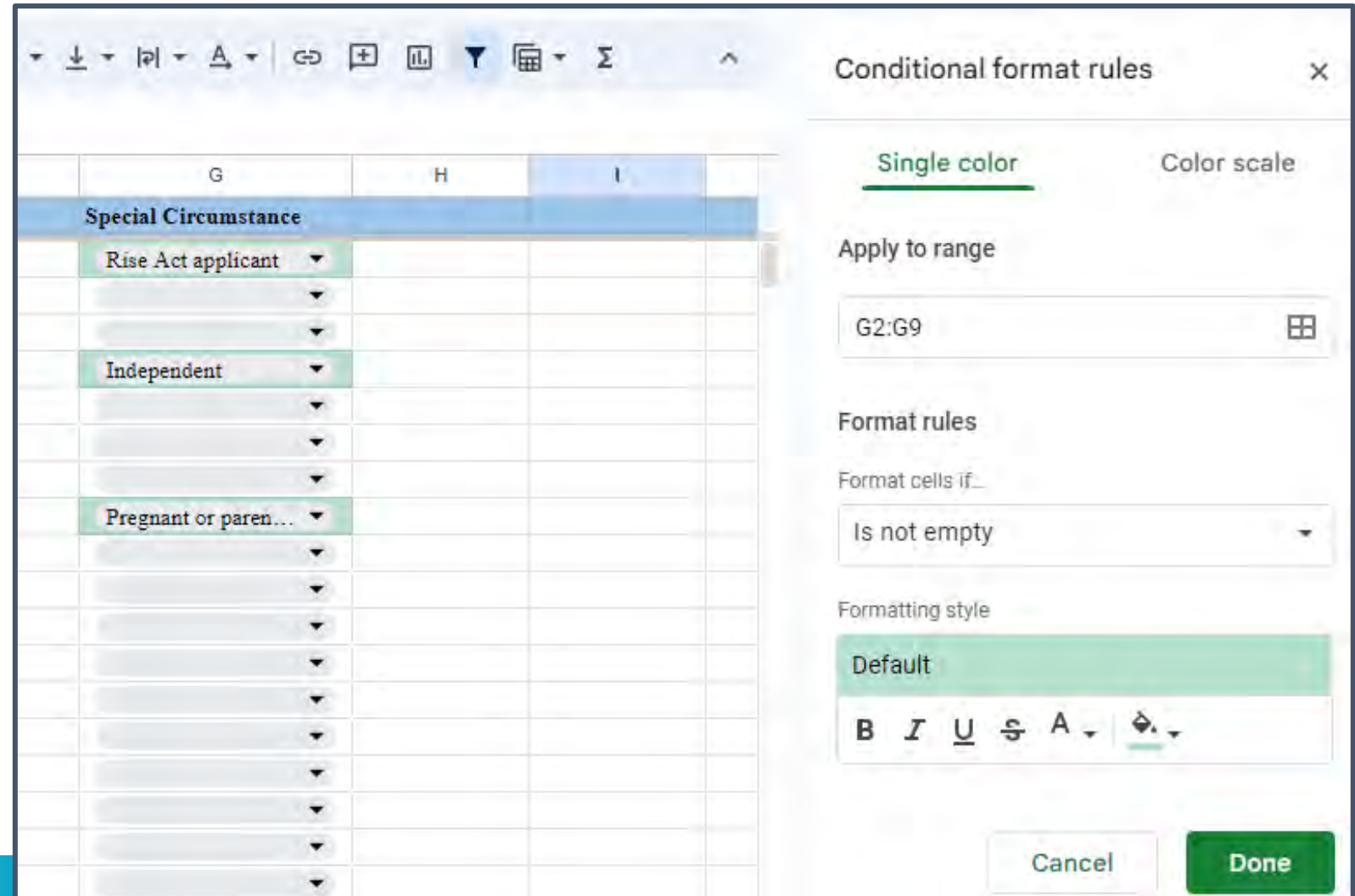
A	B	C	
Student Name	Student's Legal Name	Parent(s) Marital Status	Parent Filing
Susie Tovar	Susie Tovar	Married	Married filing
Jennifer Garcia	Jennifer Garcia-Alvarez	Married	
Christine Smith	Christine Smith	Unmarried living with both parents	
Arika Linton	Arika Linton	Never married living with one parent	
Kelly O'Brien	Kelly O'Brien	Divorced	
Keon McCottrell	Keon McCottrell	Remarried	
Ifunaya Odume	Chika Ifunaya Odume	N/A	
Kelly Finnerty	Kelly Finnerty		

D	E	F	G	H
Parent Filing Status			Special Circumstance	
Married filing jointly			Rise Act applicant	
Married filing jointly			Independent	
Married filing separately			Pregnant or parenting	
Head of Household			Rise Act applicant	
Single			Homeless	
Non-filer				
N/A				

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

Conditional Formatting is your friend.

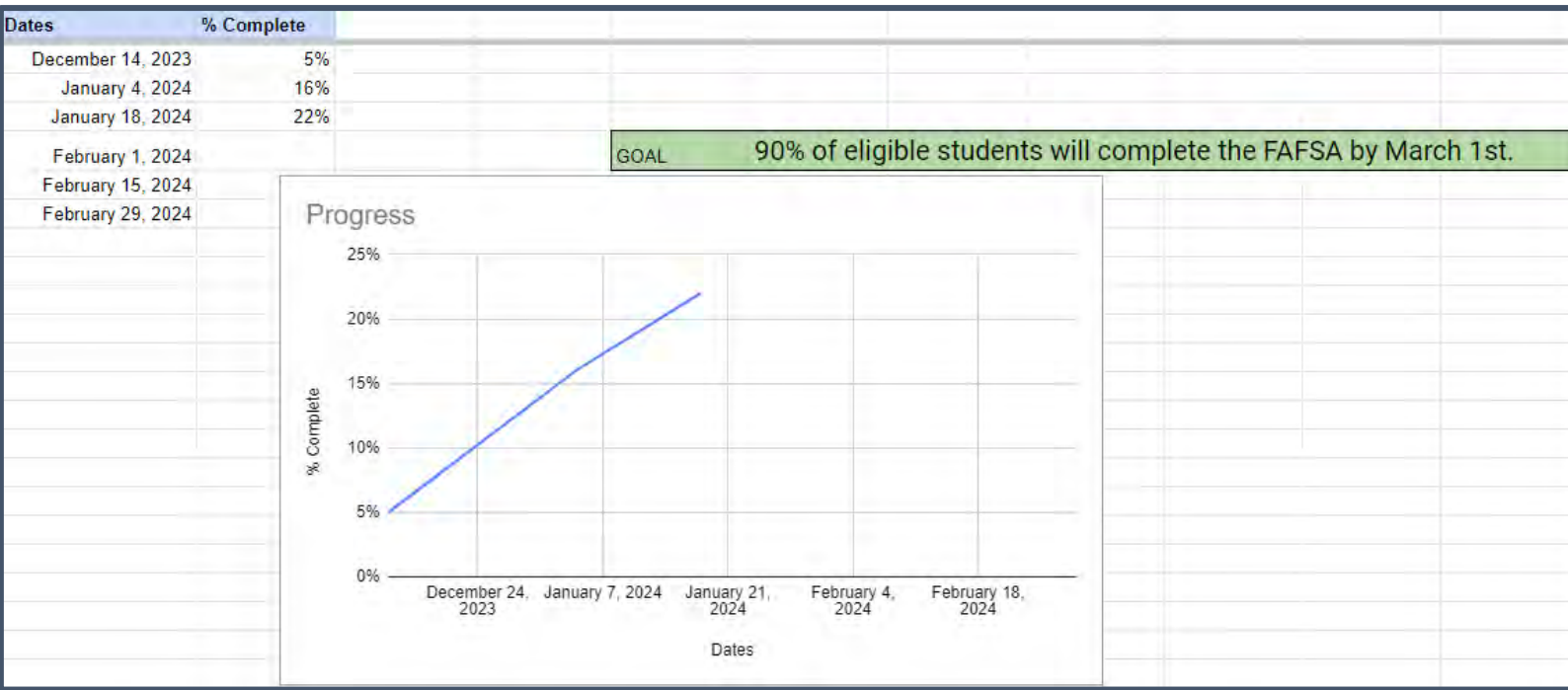
Date Processed	SAI
1/15/2024	\$0
12/20/2023	\$237
12/15/2023	-\$120
1/15/2024	
2/1/2024	\$1,200
2/2/2024	



The screenshot shows the 'Conditional format rules' dialog box in Microsoft Excel. The dialog is open over a spreadsheet. The spreadsheet has columns G, H, and I. Row 2 is highlighted in blue and contains the text 'Special Circumstance'. Below this, there are several rows with dropdown menus. The first dropdown is 'Rise Act applicant', the second is 'Independent', and the third is 'Pregnant or paren...'. The dialog box has a title bar 'Conditional format rules' and a close button 'X'. It has two tabs: 'Single color' (selected) and 'Color scale'. Under 'Apply to range', the range 'G2:G9' is entered. Under 'Format rules', the 'Format cells if...' dropdown is set to 'Is not empty'. Under 'Formatting style', the 'Default' style is selected, and the formatting options include Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Font Color (A), and Fill Color (fill icon).

Other ways to use Google Sheets

Tracker ▾ Saturday Session Sign Up ▾ **Benchmark Tracker ▾**



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.

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.



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?



- OneGoal partners with schools & districts across Illinois
- Visit our website: [OneGoal.org](https://www.onegoal.org)
- Utilize & Share: [GradPlan.org](https://www.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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