Best Practices around FAFSA Completion

Office of Postsecondary Readiness

Spring 2016
Agenda

Learning Objectives: What will I know – or be thinking about - at the end of this day?

- What new resources does the NYC DOE have to help me ensure that I support all students in FAFSA completion or better address gaps in my current efforts?

- How can I access live FAFSA and TAP completion data and how can this help me in supporting all students in completing FAFSA?
Agenda

I. Welcome and Introductions (5 minutes)

II. FAFSA Completion Data Portal (20 minutes)

III. Using the “Understanding FAFSA” Guide (30 minutes)
   Jigsaw Reading
   Share Out
   Gallery Walk

IV. Whole Group Share Out/Q & A (5 minutes)
The FAFSA Completion Initiative is a new initiative through which the U.S. Department of Education (US DOE) is partnering with state student grant agencies to allow these agencies to provide secondary schools, school districts, and certain designated entities important, information on student progress in completing the FAFSA form.

What are schools expected to do with this data? Schools are encouraged to provide FAFSA completion assistance to graduating seniors who have not yet completed financial aid forms or who whose forms have not been submitted successfully.
What is the FAFSA Completion Data Portal?

- **FAFSA completion data portal** was created by the New York State Higher Education Services Corporation (HESC).
- View live data on FAFSA and TAP completion for graduating students.
- Data is processed daily except for holidays and weekends.

We hope that this new real-time data tool will help schools support their students in completing these important financial aid forms.
Who can access these completion reports?

- NYCDOE obtained data sharing agreements and user permissions on behalf of DOE staff.

- Beginning January 12 DOE high school principals and staff members who are designated as “College and Career Access Points” in Galaxy will receive an email from hesc.efan.application@hesc.ny.gov with a registration link for the FAFSA Completion Data Portal by February 12.

- Please note: staff will receive a unique registration link that must be completed within 24 hours and registration is by person, not school.

- For questions about registration process, staff must call Higher Education Services Corporation (HESC) Helpdesk at 1-866-431-4372.
I did not get welcoming email from HESC, how can I gain access to this data?

Ask your school principal. Principals have the ability to grant access for additional staff to receive the FAFSA/TAP completion information. Detailed instructions on how your principal can do this can be found here.
Can non-DOE employees working in schools access this data?

No. NYCDOE obtained data sharing agreements and user permissions on behalf of DOE staff. Community Based Organizations and other institutions can work directly with HESC to obtain data sharing agreement. Additional information on this process can be found [here](#).
Where do I access these completion reports?

https://www.hesc.ny.gov/partner-access/high-school-counselors/fafsa-completion-initiative.html
Creating Completion Reports

Once you’ve logged in to data portal, you can now create customized reports by choosing following parameters

• Select the report format – either a PDF or a Spreadsheet.

• Select the academic year – high school students graduating in June 2016, will be enrolling in college for the 2016-17 academic year.

• Select date range for the report – if left blank, the report will show all records for the academic year selected. However, you may want to generate data showing statuses for the month or from the date you last generated a report.
Creating Completion Reports (continued)

You will be able to choose the desired sort order. Select a primary sort field and a secondary sort field. You can sort by any of the following data elements:

- Last Name/First name
- NCES School Code
- Date FAFSA Submitted
- Date FAFSA Processed
- FAFSA Completion Status
- Date TAP Application
- TAP Application Submitted
- TAP Application Status
Sample Completion Report - pdf format

If you selected pdf format, report will display the parameters you entered along with a key for the FAFSA and TAP filing status codes

Page 1:

![Image of FAFSA/TAP Completion Report]
Sample Completion Report- pdf format

Customized report will be displayed on the second page of the PDF document. Below is a sample high school, sorted by “Student Name” as primary sort field.

Page 2:

<table>
<thead>
<tr>
<th>Student Last Name</th>
<th>Student First Name</th>
<th>MI</th>
<th>Date of Birth</th>
<th>Zip Code</th>
<th>NCES School Code</th>
<th>Date FAFSA Submitted</th>
<th>Date FAFSA Processed</th>
<th>FAFSA Completion Status</th>
<th>TAP Application Submitted</th>
<th>TAP Application Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anderson</td>
<td>Thomas</td>
<td>T</td>
<td>12/1/1993</td>
<td>12345</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>2</td>
<td>7/2/2015</td>
<td>1</td>
</tr>
<tr>
<td>Franklin</td>
<td>Laurie</td>
<td>J</td>
<td>12/1/1993</td>
<td>12345</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>3</td>
<td>7/10/2015</td>
<td>3</td>
</tr>
<tr>
<td>Geeco</td>
<td>John</td>
<td>T</td>
<td>7/2/1993</td>
<td>12345</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>3</td>
<td>7/10/2015</td>
<td>3</td>
</tr>
<tr>
<td>Shellac</td>
<td>Meghan</td>
<td>M</td>
<td>4/24/1993</td>
<td>67890</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>3</td>
<td>7/2/2015</td>
<td>2</td>
</tr>
<tr>
<td>Smith</td>
<td>Douglas</td>
<td></td>
<td>12/22/1991</td>
<td>12345</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/1/2015</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Smith</td>
<td>Mary</td>
<td>I</td>
<td>4/28/1993</td>
<td>12345</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tennant</td>
<td>Alex</td>
<td>I</td>
<td>5/19/1991</td>
<td>67890</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zingger</td>
<td>Anne</td>
<td>E</td>
<td>1/25/1993</td>
<td>67890</td>
<td>362475003362</td>
<td>7/1/2015</td>
<td>7/18/2015</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Sample Completion Report - excel format

If you selected a Spreadsheet format, you will again see the parameters entered, the filing status key code, and the report itself.
Resources and Contact Information:

For general questions on FAFSA best practices and other financial aid resources visit:
http://schools.nyc.gov/Offices/OPSR/financialaid

OPSR College and Career Planning Team:
Andrea Soonachan, asoonchan@schools.nyc.gov
Sugeni Pérez-Sadler, sperezsadler@schools.nyc.gov
Appendix

What matching criteria does HESC use for this FAFSA completion initiative?

- Student last name
- Student first name and middle initial
- The student’s date of birth
- The student’s zip code (not full address)
- The student’s high school
FAFSA: The How-To Guide
FAFSA: The How-To Guide

USING THE GUIDE: Modeling an Activity you Can Use with Students

Divide your table into three groups. Each group will read one section of the FAFSA guide.

**Group One:** What is FAFSA and how do I get ready for it?  Read pages 1 - 9

**Group Two:** Whose information do I need?  Read pages 10 - 18

**Group Three:** What to do after I press submit?  Read pages 18 - 28

FIVE MINUTES
# FAFSA: The How-To Guide

**USING THE GUIDE: Modeling an Activity you Can Use with Students**

After you read, your group should work together to complete the chart below, only for the section you read. **(FIVE MINUTES)**

<table>
<thead>
<tr>
<th></th>
<th>List 3 facts you learned in this section</th>
<th>What would you tell a colleague about FAFSA after reading this? (If using this activity with students, change to “what would you tell a friend?”)</th>
<th>What will your next step be after reading this?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What is FAFSA and how do I get ready for it?</strong> Pages 1 – 9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Whose information do I need?</strong> Pages 10-18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>What to do after I press submit?</strong> Pages 18-28</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FAFSA: The How-To Guide

USING THE GUIDE: Modeling an Activity you Can Use with Students

Share out: Complete the other columns as you hear from the other two groups.

TEN MINUTES
FAFSA: The How-To Guide

PART II. REFLECTION

At your table, respond to the questions below, and record your answers on the chart paper provided.

• How would you use this with students or families?
• What are the biggest challenges you/your students face with FAFSA completion?
• What best practices do you have in place to address these challenges?

TEN MINUTES
FAFSA: The How-To Guide

Gallery Walk:

When your table has completed your chart, walk around the room and read the other charts.

Take notes on what you read, using the chart on your worksheet.
Wrap Up

Thank you for coming!
Don’t forget to complete an evaluation.