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)

What is the FAFSA Completion Initiative?

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 to 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.

How to Join The NYS FAFSA Completion Initiative

1. **Complete, sign and submit a Data Access and Security Agreement.** If you have questions when completing the Agreement, email FAFSACompletioninitiative@hesc.ny.gov.
2. **Complete, sign and submit a Chief Authorizing Official (CAO) Designation Form.** You will receive an email from HESC containing the CAO Designation Form once HESC is in receipt of your signed Data Access Security Agreement.
3. **A CAO account will be established for you and instructions will be emailed** on how to grant other employees in your high school or district access to filing status information.
4. **You and your other designated staff can now access information on your students' FAFSA and TAP filing status.**

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:

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:

New York Higher Education Service Corporation
99 Washington Avenue Albany, New York 12255
1-866-431-HESC (1-866-431-4372)
www.hesc.ny.gov

FAFSA/TAP Completion Report

Student Last Name	Student First Name	MI	Date of Birth	Zip Code	NCES School Code	Date FAFSA Submitted	Date FAFSA Processed	FAFSA Completion Status	TAP Application Submitted	TAP Application Status
Anderson	Thomas	T	12/1/1993	12345	362475003362	7/1/2015	7/18/2015	2	7/2/2015	1
Abbott	Jessica	A	11/1/1993	12345	362475003362	7/1/2015	7/18/2015	2	7/10/2015	3
Doe	Jane	M	6/25/1993	67890	362475003362	7/1/2015		1		
Franklin	Laurie	J	12/1/1993	12345	362475003362	7/1/2015	7/18/2015	3	7/10/2015	3
Greco	John	T	7/2/1993	12345	362475003362	7/1/2015	7/18/2015	3		
Shellac	Meghan	M	4/24/1993	67890	362475003362	7/1/2015	7/18/2015	3	7/2/2015	2
Smith	Douglas		12/22/1993	12345	362475003362	7/1/2015		1		
Smith	Mary	J	4/28/1993	12345	362475003362	7/1/2015		1		
Tennant	Alex	J	5/19/1993	67890	362475003362	7/1/2015	7/18/2015	3		
Victor	Anothony	M	3/25/1993	67890	362475003362	7/1/2015		1		
Zinnger	Anne	E	1/25/1993	67890	362475003362	7/1/2015	7/18/2015	3	7/2/2015	2

NYC Department of Education
Carmen Fariña, Chancellor

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.

The following parameteres were used to generate this report										
Parameter Name	Value									
NCES School Code	3624750003362									
Academic Year	2015–16									
FAFSA Submitted Date Begin	All									
FAFSA Submitted Date End	All									
First Sort Order	Last Name/First name									
Second Sort	NCES School Code									

KEY:
FAFSA Completion Status:
1 = FAFSA submitted but not processed due to missing signature(s)
2 = FAFSA processed with an EFC calculated
3 = FAFSA processed with errors
TAP Application Status:
1 = TAP Application submitted but not processed due to missing signature(s)
2 = TAP Application processed and eligibility determined
3 = TAP Application processed with errors

Status Key

Student Last Name	Student First Name	MI	Date of Birth	Zip Code	NCES School Code	Date FAFSA Submitted	Date FAFSA Processed	FAFSA Completion Status	TAP Application Submitted	TAP Application Status
Anderson	Thomas	T	12/1/1993	12345	3624750003362	7/1/2015	7/18/2015	2	7/2/2015	1
Abbott	Jessica	A	11/1/1993	12345	3624750003362	7/1/2015	7/18/2015	2	7/10/2015	3
Doe	Jane	M	6/25/1993	67890	3624750003362	7/1/2015		1		
Franklin	Laurie	J	12/1/1993	12345	3624750003362	7/1/2015	7/18/2015	3	7/10/2015	3
Greco	John	T	7/2/1993	12345	3624750003362	7/1/2015	7/18/2015	3		
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Smith	Douglas		12/22/1993	12345	3624750003362	7/1/2015		1		
Smith	Mary	J	4/28/1993	12345	3624750003362	7/1/2015		1		
Tennant	Alex	J	5/19/1993	67890	3624750003362	7/1/2015	7/18/2015	3		
Victor	Anothony	M	1/25/1993	67890	3624750003362	7/1/2015		1		

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:
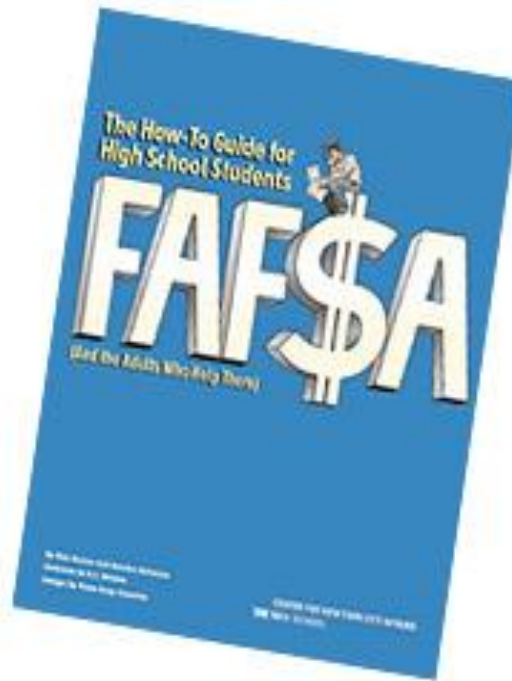
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Appendix

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 <u>one</u> 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)

	List 3 facts you learned in this section	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?")	What will your next step be after reading this?
What is FAFSA and how do I get ready for it? Pages 1 – 9			
Whose information do I need? Pages 10-18			
What to do after I press submit? Pages 18-28			

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 <u>record your answers on the chart paper provided</u>.

- 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.