

Summary of Enhancements to the
2017-2018 Free Application for Federal Student Aid (FAFSA®)

Section 1: In this section, we've described changes to the 2017-2018 PDF FAFSA resulting from public comments. Some of these changes also impact FAFSA on the Web.

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- Column 1
 - Using Your Tax Return
 - We've rearranged the text in the first two paragraphs to read: "We recommend that you complete and submit your FAFSA as soon as possible on or after October 1, 2016. The easiest way to complete or correct your FAFSA with accurate tax information is by using the IRS Data Retrieval Tool through www.fafsa.gov. In a few simple steps, most students and parents who filed a 2015 tax return can view and transfer their tax return information directly into their FAFSA.

If you (or your parents) have missed the 2015 tax filing deadline of April 2016, and still need to file a 2015 income tax return with the Internal Revenue Service (IRS), you should submit your FAFSA now using estimated tax information, and then you **must correct** that information **after you file** your return."
- Column 2
 - We've updated the state deadline information.

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- Column 1
 - How much student financial aid will I receive?
 - We've updated the text in the last sentence to read: "...in income from 2015 to this year."
 - When will I receive the student financial aid?
 - We've moved the last sentence, "If you are eligible for a Federal Pell Grant....same period of enrollment." to the "How much student financial aid will I receive?" section, so that this last section reads as follows: "Using the information on your FAFSA and your EFC, the financial aid office at your college will determine the amount of aid you will receive. The college will use your EFC to prepare a financial aid package to help you meet your financial need. Financial need is the difference between the cost of attendance (which can include living expenses), as determined by your college, and your EFC. If you are eligible for a Federal Pell Grant, you may receive it from only one college for the same period of enrollment. If you or your family has unusual circumstances that should be taken into account, contact your college's financial aid office. Some examples of unusual circumstances are: unusual medical or dental expenses or a large change in income from 2015 to this year."

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- o We've updated the text in Question 29 to read: "What will your college grade level be when you begin the 2017-2018 school year?"

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- o The text preceding Questions 75-79 was updated to: "At any time during 2015 or 2016, did you, your parents, or anyone in your parents' household (from question 73) receive benefits from any of the federal programs listed? Mark all that apply. Answering these questions will NOT reduce eligibility for student aid or these programs. TANF has different names in many states. Call 1-800-433-3243 to find out the name of your state's program. If you, your parents, or anyone in your household receives any of these benefits after filing the FAFSA but before December 31, 2016, you must update your response by logging in to **fafsa.gov** and selecting "Make FAFSA Corrections."
- o We've updated the text in Question 77 to: "Free or Reduced Price School Lunch."

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- o The text preceding Questions 97-101 was updated to: "At any time during 2015 or 2016, did you (or your spouse) or anyone in your household (from question 95) receive benefits from any of the federal programs listed? Mark all that apply. Answering these questions will NOT reduce eligibility for student aid or these programs. TANF has different names in many states. Call 1-800-433-3243 to find out the name of your state's program. If you (or your spouse) or anyone in your household receives any of these benefits after filing the FAFSA but before December 31, 2016, you must update your response by logging in to **fafsa.gov** and selecting "Make FAFSA Corrections."
- o We've updated the text in Question 99 to: "Free or Reduced Price School Lunch."
- o We've reverted Step Six instructions to the 2016-2017 version: "Enter the six-digit federal school code and your housing plans for each college or school you wish to receive your FAFSA information. You can find the school codes at **www.fafsa.gov** or by calling 1-800-433-3243. If you cannot obtain a code, write in the complete name, address, city and state of the college. All of the information you included on your FAFSA, *with the exception of the list of colleges*, will be sent to each of the colleges you listed. In addition, all of your FAFSA information, *including the list of colleges*, will be sent to your state student grant agency. For federal student aid purposes, it does not matter in what order you list your selected schools. However, the order in which you list schools may affect your eligibility for state aid. Check with your state grant agency for more information. To find out how to have more colleges receive your FAFSA information, read **What is the FAFSA?** on page 2."
- o We've updated the text in the preparer's signature box to read: "If a fee was paid to someone for advice or for completing this form, that person must complete this section."

Section 2: In this section, we've described changes specific to FAFSA on the Web resulting from public comments. These changes do not impact the PDF FAFSA.

- o We've updated the text and responses that display on the "Homeless or at Risk of Being Homeless" page to read:

(displays if applicant is aged 21 or younger, answered "yes" to the homeless filtering question, and answered "no" to FAFSA questions 56, 57 and 58) "You indicated that you are homeless or at risk of being homeless and you answered "no" to all of the specific homeless questions.

However, your financial aid administrator could make a determination that you meet the conditions necessary to be considered homeless and, therefore, do not need to provide parental information, if you meet both of the following conditions:"

(displays if applicant is aged 22 or 23 and answered "yes" to the homeless filtering question) "You indicated that you are homeless or at risk of being homeless.

Since you are over the age of 21, you must follow up with the financial aid administrator at the college you plan to attend since they can make a determination that you meet the conditions necessary to be considered homeless and, therefore, do not need to provide parental information, if you meet both of the following conditions:"

(displays for all applicants who reach this page)

- **"You are homeless**, which means you are lacking fixed, regular and adequate housing, which includes living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you had nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent, you may be considered homeless even if your parent would otherwise provide a place to live; and
- **You are unaccompanied**, which means you are not living in the physical custody of your parent or guardian.

If you believe that you meet these conditions and would like to follow up with the financial aid administrator at the college you plan to attend, select "I am unaccompanied and either homeless or at risk of being homeless" and click **Next** to get additional information.

If you do not meet the above conditions and will therefore be providing parental information, select "I will provide parental information" and click **Next** to continue.

I am unaccompanied and either homeless or at risk of being homeless
I will provide parental information"

- o Help text was also updated to reflect revised language.

- o For applicants who select "I am unaccompanied and either homeless or at risk of being homeless" on the previous page, we've updated the text and responses that display on the "Unable to Provide Parental Information" page to read:

"You told us that you are homeless or are at risk of being homeless. Review the following to continue.

You may submit your FAFSA without parental information. However, we will not calculate your Expected Family Contribution (EFC), which is the index used by colleges to determine how much student aid you are eligible to receive. In order to determine how much student aid you are eligible to receive, **you must follow up with the financial aid administrator at the college you plan to attend.**

Only your financial aid administrator can make the determination that you meet the homeless conditions and are therefore not required to provide parental information.

If you are able to get written evidence of your situation from people like school counselors, social workers, service providers, or clergy, you should provide this information to your financial aid administrator.

If you are not able to obtain written evidence of your homeless status, your financial aid administrator may make a determination about your status based on a documented interview with you. After reviewing your circumstances carefully, your financial aid administrator will decide if you meet the homeless conditions.

Remember, we will not calculate your EFC until you have received a determination of homeless status from your financial aid administrator. You should be aware of any approaching deadlines for your state, college, or scholarship aid.

Select one of the following options and click **Next** to continue.

I am unable to provide parental information and acknowledge that I must follow up with my financial aid administrator
I will provide parental information"

- o Note - help topics related to homelessness were also updated to reflect revised language.

- o We've updated the first Internal Revenue Service Data Retrieval Tool (IRS DRT) filtering question in *FAFSA on the Web* to include a hyperlink to help text:

"Did you file a <link>Form 1040X amended tax return</link> for 2015?" for students. A similar change has been made to the parent question.

- o We've added messaging to provide tax year guidance when the reported marital status date falls after the end of the tax year for which income information is being reported (for 2017-2018, a marital status date of 1/2016 or later). Messaging includes a hyperlink to help text:

"You indicated that you <recently married or remarried / had a recent marital status change> [depending on the change]. <link>To correctly answer the student financial questions</link>, you must report information about <you and your current spouse / yourself only and not your former spouse> [depending on the student marital status], even if you filed <separate tax returns /a joint tax return> for 2015." for students. A similar change has been made for parents.

- o We've added the following text to Questions 43 and 92:

"Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees."

- o We've bolded the following text that displays on the confirmation page for applicants who indicated they are or were in foster care:

"You reported that you are or were in Foster Care. **You may be eligible for assistance through federal programs for foster youth**, such as the John H. Chafee Foster Care Independence Program and/or the Education and Training Voucher (ETV) Program.
For more information contact your <link>state ETV coordinator</link>."

Section 3: 2017-2018 Enhancements communicated in the Federal Register posted March 29, 2016

Starting with the 2017-18 award year, the pre-printed FAFSA will no longer be available. The pre-printed FAFSA is the booklet version of the FAFSA. The PDF FAFSA will still be available for download across multiple Federal Student Aid Web sites (e.g., fafsa.gov, StudentAid.gov/resources, and FinancialAidToolkit.ed.gov/resources). Students will be able to obtain paper copies of the PDF FAFSA (which can be completed manually) by calling the Federal Student Aid Information Center (FSAIC) toll free at 1-800-4-FED-AID (1-800-433-3243).

Global Changes

- We've incremented date and year references, with the exception of those questions impacted by [the President's September 14, 2015 announcement](#) regarding a change to which tax year's information will now be collected on the FAFSA. Those questions in which the year reference was NOT incremented are identified throughout this document.

Page 1

- Column 1
 - o Applying by the Deadlines
 - We've updated January references to October.
 - o Using Your Tax Return
 - We've updated January to October.
 - We've updated the first paragraph to: "We recommend that you complete and submit your FAFSA as soon as possible on or after October 1, 2016. If you (or your parents) have missed the 2015 tax filing deadline of April 2016, and still need to file a 2015 income tax return with the Internal Revenue Service (IRS), you should submit your FAFSA now using estimated tax information, and then you **must correct** that information **after you file** your return."
 - We did not increment the tax year references. (See update in Section 1)
- Column 2
 - o We've updated all instances of "As soon as possible after January 1, 2016" to "As soon as possible after October 1, 2016" in the deadlines.
 - o We've incremented year references. However, deadline dates in this draft of the FAFSA are not final. Dates will be finalized in consultation with the states, and included in the draft of the FAFSA posted for the 30-day public comment period. (See update in Section 1)

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- In Step 2, we've added "and are not remarried" after "or widowed" in the second sentence.
- The year references in Questions 32-34 were not incremented:
 - For 2015, have you (the student) completed your IRS income tax return or another tax return listed in question 33?
 - What income tax return did you file or will you file for 2015?
 - For 2015, what is or will be your tax filing status according to your tax return?
- The year references in Questions 36-38 were not incremented:
 - What was your (and spouse's) adjusted gross income for 2015?
 - Enter your (and spouse's) income tax for 2015.
 - Enter your (and spouse's) exemptions for 2015.
- The year reference in the note preceding Questions 39-40 was not incremented:
 - Questions 39 and 40 ask about earnings...in 2015.
- The year references in Questions 39-40 were not incremented:
 - How much did you earn from working in 2015?
 - How much did your spouse earn from working in 2015?

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- The year references in Questions 44 and 45 were not incremented:
 - Student's 2015 Additional Financial Information
 - Student's 2015 Untaxed Income
- We've bolded "**Exclude rollovers.**" in questions 45e and 45f.

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- We added Medicaid to Question 75 to allow applicants whose parents received this means-tested benefit to qualify for the Simplified Needs Test.
- The text preceding Questions 75-79 was updated to: "For 2015 or 2016, did you, your parents, or anyone in your parents' household (from question 73) receive benefits from any of the federal programs listed? If, at the time you are completing the FAFSA, you, your parents, or anyone in your parents' household did NOT receive any of these benefits during 2015 or 2016, but do receive any of them on or before December 31, 2016, you must return to the FAFSA and update your response. Mark all that apply. Answering these questions will not reduce eligibility for student aid or these programs. TANF may have a different name in your parents' state. Call 1-800-433-3243 to find out the name of the state's program." ([See update in Section 1](#))
- The year references in Questions 80-82 were not incremented:
 - For 2015, have your parents completed their IRS income tax return or another tax return listed in question 81?
 - What income tax return did your parents file or will they file for 2015?
 - For 2015, what is or will be your parents' tax filing status according to their tax return?

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- The year references in Questions 85-87 were not incremented:
 - What was your parents 'adjusted gross income for 2015?
 - Enter your parents' income tax for 2015.
 - Enter your parents' exemptions for 2015.
- The year reference in the note preceding Questions 88-89 was not incremented:
 - Questions 88 and 89 ask about earnings...in 2015.
- The year references in Questions 88-89 were not incremented:
 - How much did Parent 1...earn from working in 2015?
 - How much did Parent 2...earn from working in 2015?
- The year references in Questions 93-94 were not incremented:
 - Parents' 2015 Additional Financial Information
 - Parents' 2015 Untaxed Income
- We've bolded "**Exclude rollovers.**" in questions 94e and 94f.

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- We added Medicaid to Question 97 to allow applicants who received this means-tested benefit to qualify for the Simplified Needs Test.
- The text preceding Questions 97-101 was updated to: "For 2015 or 2016, did you (or your spouse) or anyone in your household (from question 95) receive benefits from any of the federal programs listed? If, at the time you are completing the FAFSA, you (or your spouse) or anyone in the household did NOT receive any of these benefits during 2015 or 2016, but do receive any of them on or before December 31, 2016, you must return to the FAFSA and update your response. Mark all that apply. Answering these questions will not reduce eligibility for student aid or these programs. TANF may have a different name in your state. Call 1-800-433-3243 to find out the name of the state's program." (See update in Section 1)
- The Step Six instructions were updated to: "Enter the six-digit federal school code and your housing plans for each college or school you want to receive your FAFSA information. You can find the school codes at www.fafsa.gov or by calling 1-800-433-3243. If you cannot obtain a code, write in the complete name, address, city and state of the college. All of the information you included on your FAFSA, with the exception of the list of colleges, will be sent to each of the colleges you list as well as your state student grant agency. It does not matter in what order you list your selected schools. To find out how to have more colleges receive your FAFSA information, read **What is the FAFSA?** on page 2." (See update in Section 1)
- The signature year in Question 104, Date this form was completed, was updated to include three years: 2016, 2017, and 2018.

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- In the Notes for questions 56-58 (page 5), second paragraph, second sentence, we changed "...contact your college financial aid office for assistance..." to "...contact the financial aid administrator at the college you plan to attend..."
- In the Notes for Step Four, 1st bullet, we changed "widowed or not remarried" to "widowed and not remarried".