

**NCER-NPSAS Grant Study**  
**Connecting Students with Financial Aid (CSFA)**  
**2017: Testing the Effectiveness of FAFSA**  
**Interventions on College Outcomes**

**Appendices A, B, and C**  
**Study Materials**

**OMB # 1850-New v.1**

Submitted by  
National Center for Education Statistics  
U.S. Department of Education

**October 2016**  
**revised November 2016**

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**Summary of Intervention and Survey Communications**

<b>Appendix A – Intervention Communication Materials (to be conducted January 2017 through May 2017)</b>				
<b><i>Intervention Number</i></b>	<b><i>Title of Intervention Communication</i></b>		<b><i>Intervention Group</i></b>	<b><i>Frequency</i></b>
A-1	Intervention Letter/Email* – Neutral Framing	A-1a: Submitted 2016-17 A-1b: Incomplete 2016-17 A-1c: Not submit 2016-17	Has not submitted a FAFSA for 2017-18	4 contacts over a five month period
A-2	Intervention Letter/Email – Neutral Framing + Credit Info	A-2a: Submitted 2016-17 A-2b: Incomplete 2016-17 A-2c: Not submit 2016-17		4 contacts over a five month period
A-3	Intervention Letter/Email – Positive Framing	A-3a: Submitted 2016-17 A-3b: Incomplete 2016-17 A-3c: Not submit 2016-17		4 contacts over a five month period
A-4	Intervention Letter/Email – Negative Framing	A-4a: Submitted 2016-17 A-4b: Incomplete 2016-17 A-4c: Not submit 2016-17		4 contacts over a five month period
A-5	Intervention Letter/Email – Neutral Framing		Already submitted a FAFSA for 2017-18	4 contacts over a five month period
A-6	Intervention Letter/Email – Neutral Framing + Credit Info			4 contacts over a five month period
<b>Appendix B - Survey Communication Materials (to be surveyed October 2017 through December 2017)</b>				
<b><i>Contact Number</i></b>	<b><i>Title of Survey Communication</i></b>		<b><i>Contact Group</i></b>	<b><i>Order of Contact</i></b>
B-1	Data Collection Announcement Letter		All sample members	1
B-2	Data Collection Announcement E-mail		All sample members	2
B-3	Reminder E-mail 1		Survey non-respondents	3
B-4	Reminder Postcard 1			4
B-5	Reminder E-mail 2			5
B-6	Reminder E-mail 3			6
B-7	Reminder Postcard 2			7
B-8	Reminder E-mail 4			8
B-9	Thank You/Incentive Letter		Survey respondents who opted to receive incentive via check	Varies

\* Note: The intervention emails will be the same as the letters except they will not include letterhead or the QR code.

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**Intervention Communication Materials**

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U.S. Department of Education

**October 2016**



U.S. DEPARTMENT OF EDUCATION  
INSTITUTE OF EDUCATION SCIENCES

NATIONAL CENTER FOR EDUCATION STATISTICS

Dear <<STUDENT FIRST\_NAME>>,

According to our records, as of <<INSERT DATE>>, you have not yet applied for financial aid for next year. Completing the FAFSA is the first step to getting financial aid, and the form is available now as you consider your plans for 2017-18.

We notice that you completed the FAFSA last year. You still need to apply for student aid every year. The FAFSA is the Free Application for Federal Student Aid, meaning that it costs you nothing to complete, and the sooner you submit the FAFSA, the more aid you could receive.

Some students think they shouldn't bother to complete the FAFSA. Don't let these worries stop you!

*These statements  
are not true.*

**The reality is  
EVERYONE  
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The FAFSA asks about you and your financial situation. Depending on your circumstances, the FAFSA may also ask about your parent(s) and their financial information. You may find it helpful to have the following information or documents available:

- Social Security Number
- 2015 Tax Return and W-2 Forms
- Information on bank account balances and investments (*not including your home*)

Because you completed the FAFSA last year, you have the option to fill out the Renewal FAFSA. Using your FSA ID username and password, some of the questions will be pre-filled, saving you time and hassle. If your circumstances have changed significantly, you might decide to complete a new FAFSA instead.

There are a number of FREE resources available to help you understand how to complete the FAFSA and your financial aid. We've included the guide developed by the U.S. Department of Education, but you could also visit these websites:

- <https://fafsa.ed.gov>
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Or scan this code into your mobile device to link to studentaid.ed.gov directly.



Remember, the FAFSA is FREE. If a company asks you to pay to fill it out, then you're not working with the official FAFSA—your link to get financial aid from the U.S. Department of Education. If you have any questions, visit one of the websites listed above or call the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-433-3243).

Sincerely,

<<SIGNATURE>>

You are being contacted because you agreed to participate in an external research project when you responded to the 2015-16 National Postsecondary Student Aid Study (NPSAS:16). For more information go to: <http://nces.ed.gov/surveys/npsas/grant/>.

The National Center for Education Statistics (NCES) is authorized to conduct the National Postsecondary Student Aid Study (NPSAS) and its follow up studies, including the Connecting Students with Financial Aid (CSFA) 2017 study, by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C., § 9543), and to collect as part of these studies, under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3) and 99.35), students' education records from educational agencies or institutions in connection with an evaluation of federally supported education programs. Data collected from or about individual students are used only for statistical or research purposes and may not be disclosed or used, in identifiable form, for any other purpose except as required by law (ESRA 2002, 20 U.S.C., § 9573). These data are being collected for NCES by RTI International, a nonprofit research organization based in North Carolina.

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this voluntary information collection is 1850-NEW. The time required to complete this information collection is estimated to average approximately 10 minutes per response, including the time to review instructions, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate, suggestions for improving this survey, or any comments or concerns regarding the status of your individual submission of this survey, please write directly to: The Connecting Students with Financial Aid (CSFA) Study, National Center for Education Statistics (NCES), Potomac Center Plaza, 550 12th St., SW, PCP-4007, Washington, DC 20202



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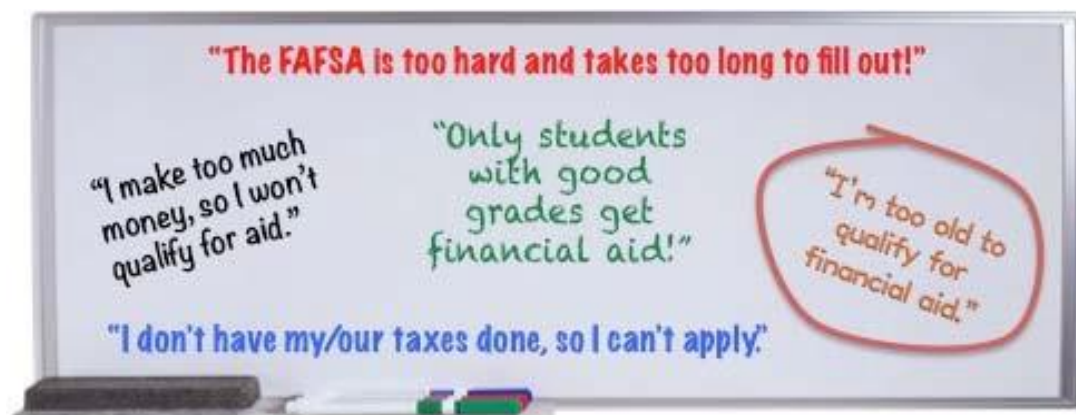
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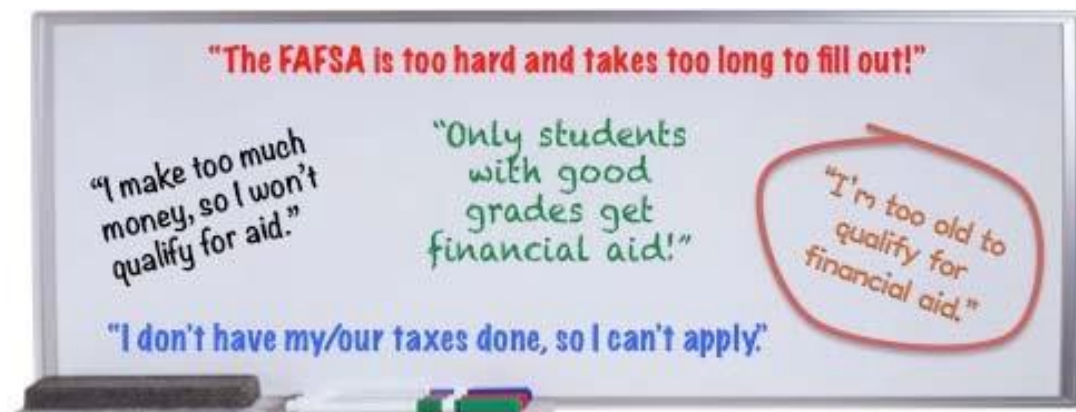
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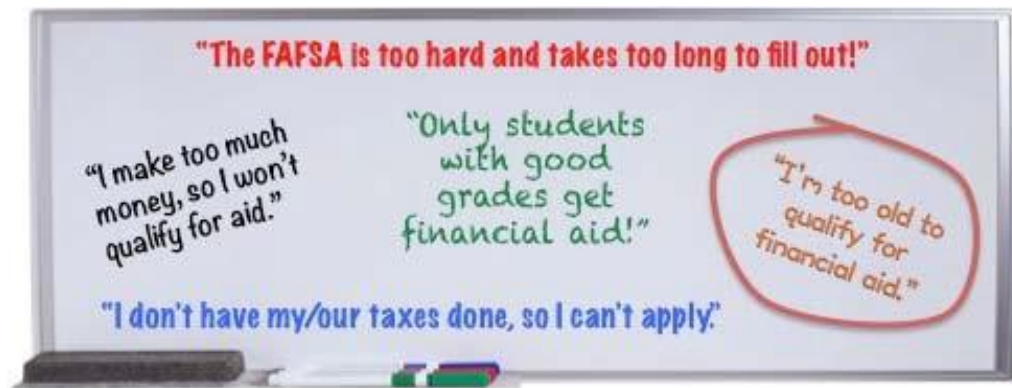
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<i>Credits Taken per Term</i>	<i>Maximum Pell Grant</i>
6	Up to \$2,910
9	Up to <b>\$4,440</b>
12	Up to <b>\$5,920</b>

As you can see, *financial aid could completely cover the cost of taking an additional class or two*, meaning you would not need to pay any more money out-of-pocket. The difference of a couple of courses could mean *thousands of dollars of financial aid*. It those additional courses could help you complete your degree sooner.

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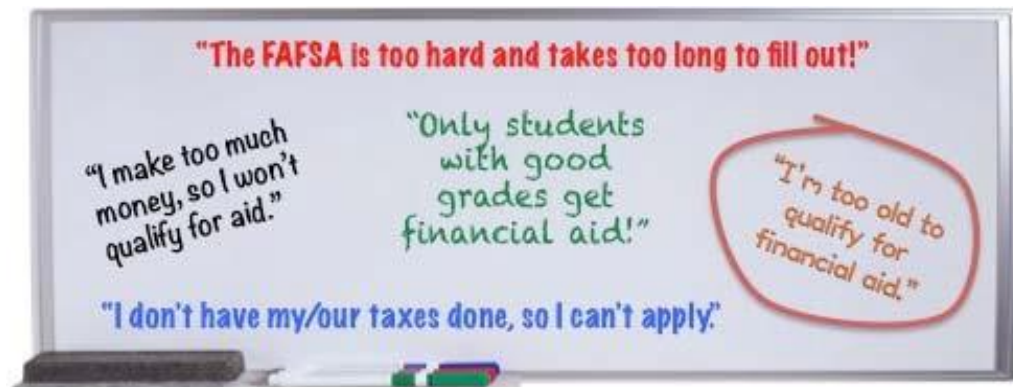
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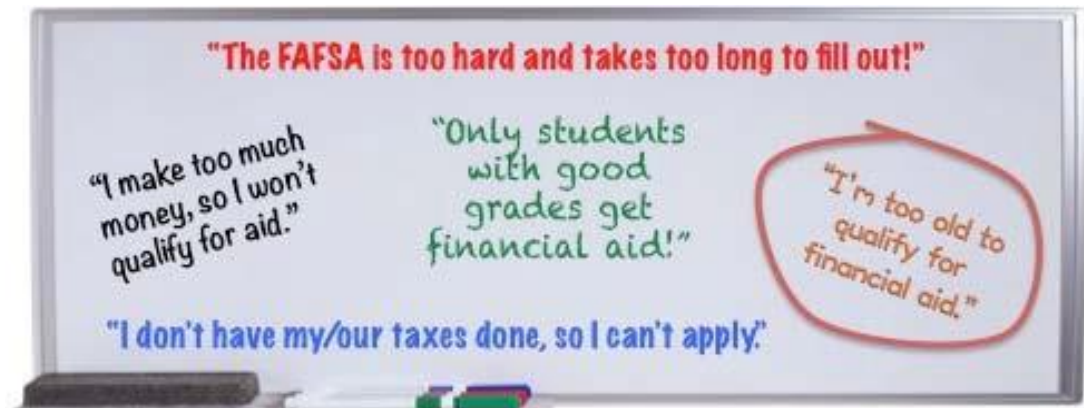
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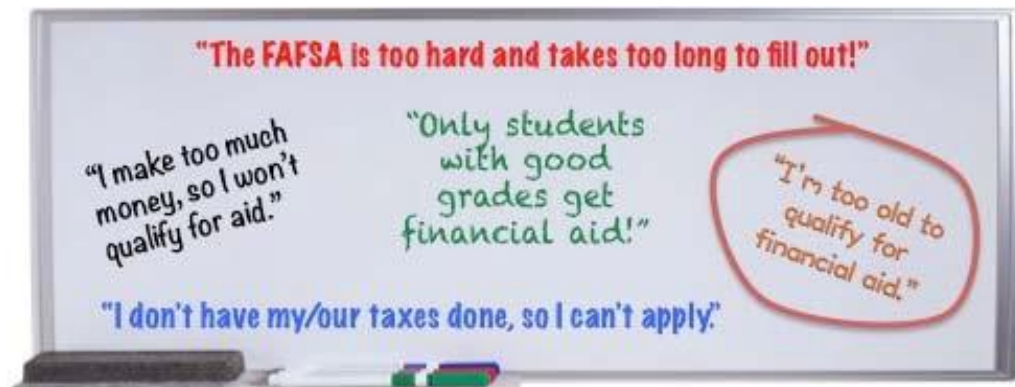
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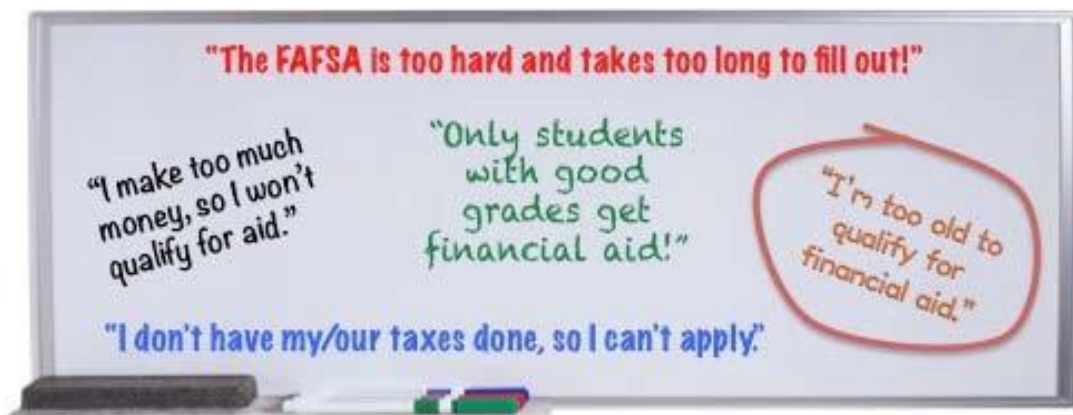
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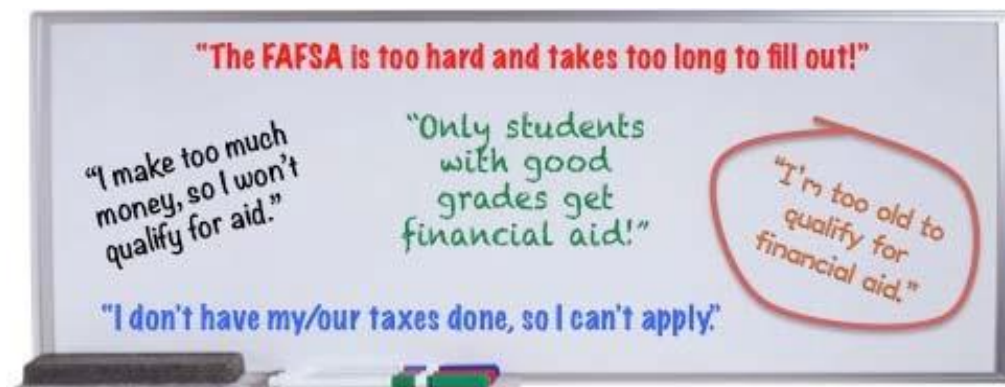
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Dear <<STUDENT\_FIRST\_NAME>>,

Congratulations on starting the process of getting financial aid by submitting the FAFSA, the federal financial aid form! You still have a few more steps in the process.

- If your FAFSA is incomplete or you need to make corrections, log into your account at <https://fafsa.ed.gov> using your FSA ID.
- You should also check with your school's financial aid office to see if there is information you need to provide them. Sometimes schools need additional paperwork or have other deadlines.

Once your FAFSA is complete, here is what you can expect.

- The U.S. Department of Education will send you a Student Aid Report (SAR).
- You will also learn your Expected Family Contribution (EFC).

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<<SIGNATURE>>

You are being contacted because you agreed to participate in an external research project when you responded to the 2015-16 National Postsecondary Student Aid Study (NPSAS:16). For more information go to: <http://nces.ed.gov/surveys/npsas/grant/>.

The National Center for Education Statistics (NCES) is authorized to conduct the National Postsecondary Student Aid Study (NPSAS) and its follow up studies, including the Connecting Students with Financial Aid (CSFA) 2017 study, by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C., § 9543), and to collect as part of these studies, under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3) and 99.35), students' education records from educational agencies or institutions in connection with an evaluation of federally supported education programs. Data collected from or about individual students are used only for statistical or research purposes and may not be disclosed or used, in identifiable form, for any other purpose except as required by law (ESRA 2002, 20 U.S.C., § 9573). These data are being collected for NCES by RTI International, a nonprofit research organization based in North Carolina.

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this voluntary information collection is 1850-NEW. The time required to complete this information collection is estimated to average approximately 10 minutes per response, including the time to review instructions, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate, suggestions for improving this survey, or any comments or concerns regarding the status of your individual submission of this survey, please write directly to: The Connecting Students with Financial Aid (CSFA) Study, National Center for Education Statistics (NCES), Potomac Center Plaza, 550 12th St., SW, PCP-4007, Washington, DC 20202





U.S. DEPARTMENT OF EDUCATION  
INSTITUTE OF EDUCATION SCIENCES

NATIONAL CENTER FOR EDUCATION STATISTICS

Dear <<STUDENT FIRST\_NAME>>,

Congratulations on starting the process of getting financial aid by submitting the FAFSA, the federal financial aid form! You still have a few more steps in the process.

- If your FAFSA is incomplete or you need to make corrections, log into your account at <https://fafsa.ed.gov> using your FSA ID.
- You should also check with your school's financial aid office to see if there is information you need to provide them. Sometimes schools need additional paperwork or have other deadlines.

Once your FAFSA is complete, here is what you can expect.

- The U.S. Department of Education will send you a Student Aid Report (SAR).
- You will also learn your Expected Family Contribution (EFC).

Also, did you know the more credits you take, the more financial aid you could receive?

<i>Credits Taken per Term</i>	<i>Maximum Pell Grant</i>
6	Up to \$2,910
9	Up to <b>\$4,440</b>
12	Up to <b>\$5,920</b>

As you can see, *financial aid could completely cover the cost of taking an additional class or two*, meaning you would not need to pay any more money out-of-pocket. The difference of a couple of courses could mean *thousands of dollars of financial aid*. It those additional courses could help you complete your degree sooner.

There are a number of FREE resources available to help you understand how to complete the FAFSA and your financial aid. We've included the guide developed by the U.S. Department of Education, but you could also visit these websites:

- <https://fafsa.ed.gov>
- <https://studentaid.ed.gov>
- <https://fsaid.ed.gov>

Or scan this code into your mobile device to link to studentaid.ed.gov directly.



Remember, the FAFSA is FREE. If a company asks you to pay to fill it out, then you're not working with the official FAFSA—your link to get financial aid from the U.S. Department of Education. If you have any questions, visit one of the websites listed above or call the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-433-3243).

Sincerely,

<<SIGNATURE>>

You are being contacted because you agreed to participate in an external research project when you responded to the 2015-16 National Postsecondary Student Aid Study (NPSAS:16). For more information go to: <http://nces.ed.gov/surveys/npsas/grant/>.

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# PREPARING FOR THE FAFSA®

The FAFSA process is quicker and easier when you have a username and password called an FSA ID. (If your parent is providing information on your FAFSA, he or she will need his or her own FSA ID as well.) Learn more about the FSA ID and how to create yours at [StudentAid.gov/fsaid](http://StudentAid.gov/fsaid).

## GATHER THIS INFORMATION

The FAFSA asks questions about you and your finances, so have the information below handy.



Social Security number



Alien registration number



Federal tax information or tax returns



Records of untaxed income



Cash, savings, and checking account balances



Investments other than the home in which you live

### DON'T HAVE ALL YOUR INFO READY YET?

That's okay; you can start the FAFSA, save it, and come back later to finish it. (To find out whether you need to report info about your parents, visit [StudentAid.gov/dependency](http://StudentAid.gov/dependency).)

# FILLING OUT THE FAFSA®

Each October, the FAFSA is available for the next school year. It's important to fill it out as soon as possible to meet school and state financial aid deadlines.

## SUBMISSION OPTIONS



**Electronic form**  
(fill out at [fafsa.gov](http://fafsa.gov))



**Mail-in application** (download PDF at [fafsa.gov](http://fafsa.gov) or order a printed PDF at [www.edpubs.gov](http://www.edpubs.gov))



**Electronic submission by your college or career school**  
(ask if they can submit the FAFSA for you)

## MEETING FINANCIAL AID DEADLINES

Each state and school has its own FAFSA deadline. Check a college's or career school's deadline on its website or by calling its financial aid office. Most state deadlines are at [fafsa.gov/deadlines.htm](http://fafsa.gov/deadlines.htm).

### DID YOU KNOW?

You may be able to retrieve and transfer tax information into the form automatically using the Internal Revenue Service Data Retrieval Tool (IRS DRT).

# PROCESSING THE FAFSA®

After you submit your FAFSA, your information will be sent to the colleges and/or career schools you listed on the form.

## PROCESS TIMELINE

You'll receive an e-mail within a few days, letting you know your FAFSA was processed.

Your college or career school might request additional information from you. Make sure you respond by any deadlines.

### FIRST-TIME APPLICANTS

You'll receive an aid offer from each college or career school you applied to and listed on your FAFSA, stating the amount of aid you could receive at the school.

Review and compare your offers, and decide which school to attend based on the school's net cost and how well the school suits your needs.

### RENEWAL APPLICANTS

You'll receive an aid offer from your school stating the amount of aid you could receive at the school.

### RECEIVING FINANCIAL AID

Formally accept the school's aid offer - and remember, if you're offered student loans, borrow only as much as you really need.

Your school will handle your aid. Ask the financial aid office when and how your aid will be paid out, what it'll cover, and how much (if any) money will come directly to you once tuition and fees are paid.

Get free assistance and answers at [fafsa.gov](https://fafsa.gov) or 1-800-4-FED-AID (1-800-433-3243).



## NCER-NPSAS Grant Studies Website

<http://nces.ed.gov/surveys/npsas/grant/>

Create category of Awards or NCER-NPSAS Grant Studies on left frame

- **Connecting Students with Financial Aid (CSFA) 2017**

### NCER-NPSAS Grant Study

#### **Connecting Students with Financial Aid (CSFA) 2017: Testing the Effectiveness of FAFSA Interventions on College Outcomes**

#### **Purpose**

This NCER- NPSAS Grant Study – *Connecting Students with Financial Aid (CSFA) 2017: Testing the Effectiveness of FAFSA Interventions on College Outcomes* investigates whether an intervention that provides financial aid information to college students increases receipt of financial aid, enrollment on a full-time (versus part-time) basis, persistence from semester to semester, and degree completion. This research is being conducted under a grant awarded through the NCER-NPSAS grant opportunity. The primary grantee is Bridget Terry Long, Harvard University (Grant Award #R305A160388) with co-principal investigator Eric Bettinger, Stanford University. Data collection will be led by the contractor, RTI International (RTI). A project description is available at: <http://ies.ed.gov/funding/grantsearch/details.asp?ID=1853>).

#### **NCER-NPSAS Grant Opportunity**

In 2010, the National Center for Education Research (NCER) and the National Center for Education Statistics (NCES), both within the U.S. Department of Education’s Institute of Education Sciences (IES), began collaborating on an education grant opportunity related to the cross-sectional National Postsecondary Student Aid Study (NPSAS). Under the NCER-NPSAS grant opportunity, researchers could submit applications to the Postsecondary and Adult Education topic within the Education Research Grants program (CFDA 84.305A), under either the Exploration or Efficacy and Replication research goal. Consistent with these two goals, NCER supports research projects using NPSAS to: 1) explore relationships between malleable factors (e.g. information on benefits of financial aid and FAFSA renewal) and postsecondary persistence and completion, as well as the mediators and moderators of those relationships; and 2) evaluate the efficacy of interventions aimed at improving persistence and completion of postsecondary education (e. g. financial aid and FAFSA renewal advice delivered via mail and email). Researchers approved for funding through this program can obtain indirect access to a subsample of the national NPSAS sample (after the study’s student interviews are completed) in order to conduct unique research projects that adhere to the guidelines set forth in the Request for Applications (RFA) for the Education Research Grants Program, as well as guidelines set forth by NCES and the NPSAS program.

On July 1, 2016, two grants were awarded using a subsample of 2015-16 NPSAS sample members:

- *Financial Aid Nudges: A National Experiment to Increase Retention of Financial Aid and College Persistence*. A project description is posted here: <http://ies.ed.gov/funding/grantsearch/details.asp?ID=1848> , and
- *Could Connecting Students with Financial Aid Lead to Better College Outcomes? A Proposal to Test the Effectiveness of FAFSA Interventions Using the NPSAS Sample* (referred to as “Connecting Students with Financial Aid (CSFA) 2017”). A project description is posted here: <http://ies.ed.gov/funding/grantsearch/details.asp?ID=1853>).

## **Authority**

The National Center for Education Statistics (NCES) is authorized to conduct the NCER-NPSAS grant studies by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C., § 9543), and to collect students’ education records from educational agencies or institutions for the purposes of evaluating Federally supported education programs under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3) and 99.35). Data collected from or about individual students are used only for statistical purposes and may not be disclosed or used, in identifiable form, for any other purpose except as required by law (ESRA 2002, 20 U.S.C., § 9573). These data are being collected for NCES by RTI International, a nonprofit research organization based in North Carolina.

## **Confidentiality**

Since these NCER-NPSAS grant studies are conducted using a subset of NPSAS:16 sample members, all data collection must be done through NCES and the NPSAS:16 data collection contractor, RTI International. This ensures that the confidentiality of the study participants is protected. Specifically, the grantee will have no access to personally identifiable information and may not have direct contact with sample members. RTI International follows strict procedures to protect the privacy and confidentiality of study participants. All project staff members have signed confidentiality agreements and affidavits of nondisclosure. Any data released to the public will be in aggregate form (e.g., statistical tables, graphs). Information obtained may be used only for statistical or research purposes and may not be disclosed, or used, in identifiable form for any other purpose, except as required by law (ESRA 2002, 20 U.S.C. § 9573).

## **Paperwork Reduction Act**

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this voluntary information collection is 1850-XXXX. The time required to complete this information collection is estimated to average approximately 10 minutes per response, including the time to review instructions, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate, suggestions for improving this survey, or any comments or concerns regarding the status of your individual submission of this survey, please write directly to: The Connecting Students with Financial Aid (CSFA) Study, National Center for Education Statistics (NCES), Potomac Center Plaza, 550 12th St., SW, PCP-4007, Washington, DC 20202.

OMB Clearance No: 1850-New Expiration Date: ##/##/2020

**NCER-NPSAS Grant Study**  
**Connecting Students with Financial Aid (CSFA) 2017:**  
**Testing the Effectiveness of FAFSA**  
**Interventions on College Outcomes**

**Appendix B**  
**Survey Communication Materials**

**OMB # 1850-New v.1**

Submitted by  
National Center for Education Statistics  
U.S. Department of Education

**October 2016**

## Data Collection Announcement Letter

<<date>>

<<name>>

<<addr1>>

<<addr2>>

<<city>>, <<st>> <<zip>>

Dear <<fname>>,

I am pleased to inform you that you have been selected to participate in the Connecting Students with Financial Aid study (CSFA), an important study that provides students with information about financial aid. You may recall receiving letters and emails from us earlier this year. Your continued participation in CSFA study is important to the success of the study.

We are now asking you to complete a brief survey on your experiences and knowledge of financial aid. **The survey will only take 10 minutes to complete, and you will receive \$30 as a token of our appreciation, payable by PayPal or check.** The survey can even be completed on your mobile device or you can complete the enclosed hardcopy survey and return it in the provided envelope. Please complete or return the survey by <<early\_Web\_date>>.

To complete the survey on the web, log on to our secure website at <https://surveys.nces.ed.gov/CSFA> using the Study ID and password below:

**Study ID** = «caseid»

**Password** = «password»m (*password is case sensitive*).

You represent many students like you who were not selected for CSFA, and your participation is important to the success of the study. If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**

If you have any other questions or concerns about the study, please contact the CSFA Project Director, Jeff Franklin, at 800-XXX-YYYY, [jwf@rti.org](mailto:jwf@rti.org), or the NCES Project Officer, Tracy Hunt-White, at 202-245-ZZZZ, [Tracy.Hunt-White@ed.gov](mailto:Tracy.Hunt-White@ed.gov).

Thank you in advance for making CSFA a success.

Sincerely,

[Insert signatures]

Jeff Franklin

Project Director, CSFA

RTI International

Tracy Hunt-White, PhD

NCES Project Officer

National Center for Education Statistics

U.S. Department of Education

Enclosure

«panelinfo»/«ctrl»

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The National Center for Education Statistics (NCES) is authorized to conduct the National Postsecondary Student Aid Study (NPSAS) and its follow up studies, including the Connecting Students with Financial Aid (CSFA) 2017 study, by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C., § 9543), and to collect as part of these studies, under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3) and 99.35), students' education records from educational agencies or institutions in connection with an evaluation of federally supported education programs. Data collected from or about individual students are used only for statistical or research purposes and may not be disclosed or used, in identifiable form, for any other purpose except as required by law (ESRA 2002, 20 U.S.C., § 9573). These data are being collected for NCES by RTI International, a nonprofit research organization based in North Carolina.

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## Data Collection Announcement E-mail

SUBJ: It's time to complete your CSFA survey!

Dear <FirstName>,

Recently, we contacted you about your selection for the Connecting Students with Financial Aid (CSFA) study, a survey of students who, like you, were enrolled in postsecondary education during the 2015-16 school year. Data collection for CSFA is now underway, and we would like to invite you to complete the survey by <date>.

**If you complete the 15 minute survey, you will receive \$30 as a token of our appreciation – payable by PayPal, or check.** The survey can easily be completed on your mobile device. To access the online survey, just [click here](#) to get started or log in on our secure website:

<https://surveys.nces.ed.gov/CSFA/>

Study ID: <caseid>

Password: <password>

The survey will ask about your experience and knowledge of financial aid. Your participation, while voluntary, is important to the success of the study. If you would like to receive a hardcopy survey through the mail, please call our Help Desk at 1-800-XXX-YYYY.

If you have any questions about the study, please contact me at 1-800-XXX-YYYY or [jwf@rti.org](mailto:jwf@rti.org), or the NCES Project Officer, Tracy Hunt-White, at 202-245-YYYY or [Tracy.Hunt-White@ed.gov](mailto:Tracy.Hunt-White@ed.gov).

Thank you for helping to make CSFA a success.

Sincerely,

Jeff Franklin  
Project Director, CSFA  
RTI International  
1-800-XXX-YYYY

OMB Control Number: 1850-NEW  
Learn more about our confidentiality procedures at <https://URL>



## Reminder E-mail 1

SUBJ: Don't Forget to Complete Your CSFA Survey!

Dear <FirstName>,

I would like to remind you that your participation in the Connecting Students with Financial Aid (CSFA) study is still needed, and that I hope that you will participate soon.

**If you complete the CSFA survey, you will receive a \$30 token of our appreciation—payable by PayPal or check! The survey—which can be easily completed on your mobile device—takes only 10 minutes to complete.**

To access the online survey, just [click here](#) or log in to our secure website:

<https://surveys.nces.ed.gov/CSFA/>

Study ID: <caseid>

Password: <password>a

If you need help accessing the online survey, or if you would like to receive a hardcopy survey through the mail, please call our Help Desk at 1-800-XXX-YYYY.

Thank you in advance for your participation in this very important study.

Sincerely,

Jeff Franklin  
Project Director, CSFA  
RTI International  
1-800-XXX-YYYY

OMB Control Number: 1850-NEW  
Learn more about our confidentiality procedures at <https://URL>

## Reminder Postcard 1

# Connecting Students with Financial Aid (CSFA) Study

Fname,

Recently we sent you information about completing the U.S. Department of Education's **CSFA survey**. This study helps policymakers learn about how financial aid impacts students enrollment in postsecondary education.

If you haven't yet participated, we'd like to remind you that we're offering **\$30** as a token of our appreciation for completing the 10-minute survey, which you can easily complete on your mobile device!

To complete your survey online, log into the study website at

<https://surveys.nces.ed.gov/CSFA>

Study ID: <<12345678>>

Password: <<P@s\$w0rd>>n

Or call **(800) XXX-YYYY** to complete your survey by phone.

**Thank you for your participation!**

## Reminder E-mail 2

SUBJ: Don't Delay - Complete Your CSFA Survey Today!

Dear <FirstName>,

Data collection for the Connecting Students with Financial Aid study continues, and it won't be a success without your participation! The survey takes **only 10 minutes to complete**, which can easily be completed on your mobile device. When you complete your survey, **you will receive a \$30 token of our appreciation**—payable by PayPal or check.

To access the online survey on our secure website, [click here](#) or log in:

<https://surveys.nces.ed.gov/CSFA/>

Study ID: <caseid>

Password: <password>

If you need help, or if you would like to receive a hardcopy survey through the mail, please call our Help Desk at 1-800-XXX-YYYY.

Thank you in advance for your participation in this very important study.

Sincerely,

Jeff Franklin  
Project Director, CSFA  
RTI International  
1-800-XXX-YYYY

OMB Control Number: 1850-NEW  
Learn more about our confidentiality procedures at <https://URL>

## Reminder E-mail 3

SUBJ: The CSFA Survey Needs YOUR Participation!

Dear <FirstName>,

Don't forget to complete the Connecting Students with Financial Aid study and receive a \$30 token of appreciation—payable by PayPal or check. The survey takes 10 minutes and can be completed online or over the phone. You can even complete it on your mobile device!

It's easy to participate in CSFA on our secure website. Just [click here](#) to get started right away!

<https://surveys.nces.ed.gov/CSFA/>

Study ID: <caseid>

Password: <password>c

Or, we can send you a survey in the mail to complete.

If you have questions or would like to receive a hardcopy survey, please call our **Help Desk at 1-800-XXX-YYYY.**

Thanks!

Jeff Franklin  
Project Director, CSFA  
RTI International  
1-800-XXX-YYYY

OMB Control Number: 1850-NEW  
Learn more about our confidentiality procedures at <https://URL>

## Reminder Postcard 2

**Just a reminder—  
we still need you to complete the CSFA survey.**

«fname»,

We value your participation in CSFA —

there's truly no substitute for your responses. That's why you will receive a **\$30** token of appreciation for completing the CSFA survey.

The survey takes about **10** minutes, and can even be completed on your mobile device!

Log on to <https://surveys.nces.ed.gov/CSFA/> with your Study ID and password.

**Study ID: «caseID»**

**Password: «password»p**

**Or call (800) XXX-YYYY if you have questions, need assistance, or would like to have a hardcopy version of the survey mailed to you.**

The Connecting Students with Financial Aid study is a follow-up survey of individuals who were enrolled in postsecondary education during the 2015-16 academic year. For more information about the grant, visit <http://nces.ed.gov/surveys/npsas/grant/>

## Reminder E-mail 4

SUBJ: It's Your Last Chance to Receive \$30!

The CSFA survey is easy to complete and takes only about 10 minutes. You can even complete it on your mobile device!

<FirstName>

Tomorrow is the last day to complete your CSFA survey and we can't replace you with anyone else! I want to remind you that **the study ends at midnight on <<date>>** and if you finish the survey by then, we'll send you a \$30 token of appreciation via PayPal or check!

To get started, [click here!](#)

Please call the **Help Desk at 1-800-XXX-YYYY** if you have any questions or problems completing your survey.

Thank you!

Jeff Franklin  
Project Director, CSFA  
RTI International  
1-800-XXX-YYYY

<https://surveys.nces.ed.gov/csfa/>

Study ID: [caseid]

Password: [pswd]g

OMB Control Number: 1850-NEW  
Learn more about our confidentiality procedures at <https://URL>



## Thank You/Incentive Letter

(Applies only to SMs who opt to receive their incentive via check.)

<<date>>

<<name>>

<<addr1>>

<<addr2>>

<<city>>, <<st>> <<zip>>

Dear «fname» «lname»:

On behalf of the National Center for Education Statistics (NCES) in the U.S. Department of Education's Institute of Education Sciences and the staff of the Connecting Students with Financial Aid (CSFA) study, we would like to thank you. Your participation in CSFA is very important in helping to ensure the success of the study.

Enclosed you will find a check for \$30 as a token of our appreciation.

If you have any questions, please do not hesitate to contact us at 1-800-XXX-YYYY.

Sincerely,

Jeff Franklin  
CSFA Project Director  
RTI International

Tracy Hunt-White, PhD  
Project Officer  
National Center for Education Statistics

**NCER-NPSAS Grant Study**  
**Connecting Students with Financial Aid (CSFA) 2017:**  
**Testing the Effectiveness of FAFSA**  
**Interventions on College Outcomes**

**Appendix C**  
**Survey Instrument**

**OMB # 1850-New v.1**

Submitted by  
National Center for Education Statistics  
U.S. Department of Education

**October 2016**

## Follow-up Survey – Survey Instrument

PAGE 1

<<ALL STUDENTS – CONSENT>>

You are being contacted because you agreed to participate in an external research project when you responded to the 2015-16 National Postsecondary Student Aid Study (NPSAS:16). For more information go to: <http://nces.ed.gov/surveys/npsas/grant/> .

- Yes, Continue on the Survey
- NO

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**PAGE 2**

**<<ALL STUDENTS>>**

Did you apply for financial aid from the government to help you with college expenses for the 2017-18 school year (i.e., this year)?	<input type="radio"/> No, I did not apply for financial aid from the government <input type="radio"/> Yes, I applied for financial aid using the following (check all that apply) <input type="checkbox"/> FAFSA (federal financial aid application) <input type="checkbox"/> State financial aid application
Did you apply for financial aid from anyone else (a non-government source) to help you with college expenses for the 2017-18 school year?	<input type="radio"/> No, I did not apply for financial aid from a non-government source <input type="radio"/> Yes, I applied for financial aid using the following (check all that apply) <input type="checkbox"/> CSS/Financial Aid Profile <input type="checkbox"/> Aid application for my school <input type="checkbox"/> Aid application for another organization
If you have ever applied for government financial aid, how did you learn about the process of applying? <i>Check all that apply.</i>	<input type="radio"/> Friend <input type="radio"/> Relative <input type="radio"/> Communication or mailing from my school <input type="radio"/> College Faculty or Staff member <input type="radio"/> Community Organization <input type="radio"/> Online website <input type="radio"/> Financial advisor <input type="radio"/> I do not know how to apply for financial aid

**PAGE 3A**

**<<SKIP LOGIC: IF A STUDENT DID NOT APPLY FOR GOVERNMENT AID >>**

Please choose the statements that apply to you:	<input type="radio"/> I've applied for financial aid before, but did not receive anything <input type="radio"/> I did not realize that I had to submit a financial aid application each year <input type="radio"/> It was too late to apply for financial aid when I decided to do so <input type="radio"/> It was too much hassle given that I am not eligible for much aid <input type="radio"/> I decided not to enroll during this school year <input type="radio"/> I don't think I am eligible for financial aid (check why below): <input type="checkbox"/> Because my family income is too high to receive financial aid <input type="checkbox"/> Because I don't have good grades <input type="checkbox"/> Because I'm not enrolled full time <input type="checkbox"/> Because I'm not a US Citizen
Do you know what the FAFSA is?	<input type="radio"/> No, I am not sure what the FAFSA is <input type="radio"/> Yes, I know what the FAFSA is, but I don't know how to complete the form <input type="radio"/> Yes, I know what the FAFSA is and have completed it before

**PAGE 3B**

<<SKIP LOGIC: IF A STUDENT DID APPLY FOR GOVERNMENT AID >>

<p>We're interested in your experiences with applying for Financial Aid. Did you receive assistance from another person to complete the FAFSA the last time you did so? If yes, please indicate from whom. <i>Check all that apply.</i></p>	<ul style="list-style-type: none"> <li><input type="radio"/> Parents</li> <li><input type="radio"/> Other Relative</li> <li><input type="radio"/> Friend</li> <li><input type="radio"/> My college's financial aid or other staff</li> <li><input type="radio"/> Community Organization</li> <li><input type="radio"/> Live counselor via phone or online</li> <li><input type="radio"/> Other</li> <li><input type="radio"/> I did not receive help from someone else</li> </ul>
<p>Please tell us how you submitted your financial aid form? <i>Check all that apply.</i></p>	<ul style="list-style-type: none"> <li><input type="radio"/> I submitted the FAFSA online</li> <li><input type="radio"/> I submitted the paper FAFSA</li> <li><input type="radio"/> I was asked to fix an error or problem with my FAFSA after I initially submitted the form</li> <li><input type="radio"/> I used the IRS Data Retrieval Tool to complete my FAFSA.</li> <li><input type="radio"/> I was asked to submit more information for "Verification" by my school</li> <li><input type="radio"/> My school also required me to complete the another application to apply for financial aid (e.g., the CSS Profile)</li> </ul>

<p>We're also interested to know your opinions about the financial aid process. <i>Please select one response to each statement.</i></p>					
<input type="radio"/> I clearly understood the steps to get financial aid for college this year.	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I was able to complete the FAFSA myself easily	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> My financial aid award letter was easy to understand	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> My school's financial aid office was available to help me understand my financial aid offer	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I know where to go if I have questions about my financial aid forms	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I lost money by not completing the FAFSA this year	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>

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<p>How many credits are you taking this term (Fall 2017)? <i>If you are unsure about the number of credits, assume each course is usually 3 credits.</i></p>	<ul style="list-style-type: none"> <li><input type="radio"/> No Credits (I am not enrolled)</li> <li><input type="radio"/> Less than 6 credits</li> <li><input type="radio"/> 6 credits (two 3-credit courses)</li> <li><input type="radio"/> 7 to 9 credits (approximately 2-3 courses)</li> <li><input type="radio"/> 10 to 11 credits</li> <li><input type="radio"/> 12 to 14 credits (full-time enrollment; approx. 4 or more courses)</li> <li><input type="radio"/> 15 credits or more (full-time enrollment; approx. 4-6 courses)</li> </ul>
<p>Are you taking more, fewer, or the same credits as the last time you enrolled in college courses?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Increased – I'm taking more credits (or courses) this term</li> <li><input type="radio"/> Decreased – I'm taking fewer credits this term</li> <li><input type="radio"/> No change – I'm taking the same number of credits</li> </ul>

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**<<SKIP LOGIC: CURRENTLY ENROLLED THIS TERM AND TAKING FEWER THAN 12 CREDITS >>**

Why are you taking fewer than 12 credits? <i>Check all that apply.</i>	<input type="radio"/> I do not need additional courses for my degree <input type="radio"/> The courses I need to take are not being offered or did not have space for me (i.e., limited enrollment) <input type="radio"/> I have other work or personal commitments <input type="radio"/> I cannot afford to pay for more courses <input type="radio"/> Other reason
If your financial aid had been doubled, not including loans, would you have taken more credits or courses?	<input type="radio"/> Yes <input type="radio"/> No
How many credits do you plan to take the next term? <i>If you are unsure about the number of credits, assume each course is usually 3 credits.</i>	<input type="radio"/> No credits (do not plan to enroll) <input type="radio"/> Less than 6 credits <input type="radio"/> 6 to 8 credits (approximately two courses) <input type="radio"/> 9 to 11 credits (approximately 3 courses) <input type="radio"/> 12 to 14 credits (approximately 4 courses; full-time enrollment) <input type="radio"/> 15 credits or more (approximately 4-6 courses; full-time enrollment)

**PAGE 5B**

**<<SKIP LOGIC: CURRENTLY ENROLLED THIS TERM AND TAKING 12 CREDITS OR MORE >>**

What made you decide to take 12 or more credits this term? <i>Check all that apply.</i>	<input type="radio"/> I need the courses to complete my degree. <input type="radio"/> I received enough financial aid to make full-time enrollment possible. <input type="radio"/> I am trying to complete my degree as quickly as possible. <input type="radio"/> Other reason
How many credits do you plan to take the next term? <i>If you are unsure about the number of credits, assume each course is usually 3 credits.</i>	<input type="radio"/> No credits (do not plan to enroll) <input type="radio"/> Less than 6 credits <input type="radio"/> 6 to 8 credits (approximately two courses) <input type="radio"/> 9 to 11 credits (approximately 3 courses) <input type="radio"/> 12 to 14 credits (approximately 4 courses; full-time enrollment) <input type="radio"/> 15 credits or more (approximately 4-6 courses; full-time enrollment)



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**<<ALL STUDENTS>>**

We're also interested to know how financial aid affects your decisions about college. <i>Please select one response to each statement.</i>					
<input type="radio"/> I'm attending my current school because of the financial aid they were able to give me	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I'm attending my current school because the available financial aid did not allow me to attend my 1st-choice school	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> After I learned about my financial aid award, I decided to take more college credits than I was originally planning	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I am only able to attend college by taking out loans	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>

Have you taken out loans to pay for college? If so, what kinds of loans?	<input type="radio"/> Federal Student Loan (e.g., Stafford Loan, Direct Loan, etc.) <input type="radio"/> Federal Parent PLUS Loan <input type="radio"/> Loan from a Bank <input type="radio"/> Loan from a relative or friend <input type="radio"/> Other Source
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**<<SKIP LOGIC: IF THE STUDENT TOOK OUT A LOAN >>**

How did you decide whether to take out a loan?	<input type="radio"/> Talked to my Parents or Other Relative <input type="radio"/> Talked to a Friend <input type="radio"/> Talked to college's financial aid staff <input type="radio"/> Got help from a Community Organization <input type="radio"/> Using an online resource to consider my options <input type="radio"/> Other <input type="radio"/> I did not receive help from someone else
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We're interested to know what you think about your loans. <i>Please select one response to each statement.</i>					
<input type="radio"/> When I took out my loans, I understood what the repayment plan would be	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> When I took out my loans, I was confident that I would be able to repay them	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> My college helped me determine the right amount of loans I needed to take	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I am concerned about how I will repay my loans	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I have stopped taking college classes because of my student loan debt	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>

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**<<SKIP LOGIC: IF THE STUDENT DID NOT TAKE OUT A LOAN >>**

How did you decide to avoid taking out a loan?	<input type="radio"/> Talked to my Parents or Other Relative <input type="radio"/> Talked to a Friend <input type="radio"/> Talked to college's financial aid staff <input type="radio"/> Got help from a Community Organization <input type="radio"/> Using an online resource to consider my options <input type="radio"/> Other <input type="radio"/> I did not receive help from someone else
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We're interested to know what you think about college student loans. <i>Please select one response to each statement.</i>					
<input type="radio"/> I worry about being able to repay a loan	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I have other debt I am managing (e.g., credits cards, car loan, mortgage)	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I found it confusing to understand my student loan options	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I received enough financial aid to be able to avoid taking out loans	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>
<input type="radio"/> I had trouble trying to get a loan and was unable to do so	<i>Strongly Disagree</i>	<i>Disagree</i>	<i>Neither Agree or Disagree</i>	<i>Agree</i>	<i>Strongly Agree</i>