

Memorandum

United States Department of Education
Institute of Education Sciences
National Center for Education Statistics

DATE: March 13, 2017

TO: Robert Sivinski and E. Ann Carson, OMB

THROUGH: Kashka Kubzdela, OMB Liaison, NCES

FROM: Tracy Hunt-White, NPSAS:16 Project Officer, NCES

SUBJECT: NCER-NPSAS Grant Study - Financial Aid Nudges 2017: A National Experiment to Increase Retention of Financial Aid and College Persistence New Messages Change Request (OMB# 1850-0932 v.3)

NCER-NPSAS Grant Study - Financial Aid Nudges 2017: A National Experiment to Increase Retention of Financial Aid and College Persistence request was approved by OMB in January 2017 (OMB# 1850-0932 v.1 and 2). In light of changes to FAFSA submission options that took place in March 2017, this memorandum requests an addition of two different text messages to the approved intervention communication materials.

When completing their FAFSA financial aid forms, students and their families have the option of using the Internal Revenue Service (IRS) Data Retrieval Tool (DRT) which allows them to electronically transfer their federal tax return information to their FAFSA federal financial aid form. In light of the unexpected shutdown of the IRS DRT for FAFSA completion, we are requesting to augment the approved intervention messages. The DRT had been available in FAFSA since 2010-11, so its unavailability was unexpected and just announced by the IRS and the Department of Education on March 10, 2017. The unavailability of the DRT, anticipated to last several weeks as of March 10th, has the potential to confuse students and lengthen the time it takes them to complete FAFSA. We are requesting to send additional text messages to alert students to the DRT issue and to help them understand that they will need tax documents in hand when completing the FAFSA. In the event that IRS fixes the problem within the project's messaging period, we are also including a message to alert students once the DRT becomes available again.

The new text messages have been added as 4a and 9a in the attached Appendix A. Below are the wording of the added text messages:

Groups 1a-1c (Message 4a): Hey, FAFSA now requires your tax docs in hand. A recent change means tax info can't automatically be pulled in. Need help, call your aid office.

Group 2 (Message 4a): Hey, FAFSA now requires your tax docs in hand. A recent change means tax info can't automatically be pulled in. Need help getting FAFSA done?

Groups 1a-1c and 2 (Message 9a): Good news— you can now file FAFSA by automatically pulling in information from your taxes! File your FAFSA now.

These additional messages do not change the estimated respondent burden or the cost to the federal government.