

**Summary of Enhancements to fafsa.gov and myFAFSA for 2020-21
For 30-day public comment period**

General Information:

This document describes changes specific to fafsa.gov and myFAFSA.

Most applicants fill out the *Free Application for Federal Student Aid* (FAFSA®) form online. Because we are unable to create an online experience that allows the public to view the 2020-21 changes to fafsa.gov or the myFAFSA mobile app during the public comment period, reviewers are encouraged to utilize the 2019-2020 FAFSA Demonstration Site and the [2019-20 myFAFSA preview presentation](#) to view the current application experiences. We do not have a demonstration system for myFAFSA.

When viewing the FAFSA form online, please keep the following in mind:

- Experiences will vary based on how each FAFSA question is answered due to the dynamic display of text and extensive built-in skip logic. For example, some questions are worded differently based on marital status, tax filing status, etc. Also, certain questions are hidden depending on the selected state of legal residence and whether the answers to relevant questions make an applicant eligible for an automatic zero EFC.

Changes to fafsa.gov for 2020-21 start-up will not be available for viewing until the 2020-21 Demonstration Site becomes available on September 29, 2019. You can access the 2019-20 version of the FAFSA Demonstration Site at <https://fafsademo.test.ed.gov>. The changes described in this document do not impact the PDF FAFSA.

In order to fully understand the changes to the entire application process, we recommend that you also read the 2020-21 Paper Enhancements Summary.

Section 1: Planned changes resulting from public comments

Changes in this section apply to both fafsa.gov and myFAFSA.

SSN- Added language to not include Individual Taxpayer Identification Number (ITIN) in the SSN field.

Taxes paid- Added language to enter zero if taxes paid is negative.

Assets- Added language to exclude The Achieving a Better Life Experience (ABLE) accounts from assets.

Other untaxed income question- Included language in the help text to inform students and parents that income not taxed by any government should be reported as untaxed income in question 44h or 92h, respectively.

College Grade Level question- Updated response options six and seven.

- 1st yr. college graduate/professional (MBA, MD, PhD, etc.)
- Continuing graduate/professional or beyond (MBA, MD, PhD, etc.)

Type of Degree or Certificate question-

- What college degree or certificate will you/the student be working on when you begin the 2020-2021 school year?
- College graduate/professional degree (MBA, MD, PhD, etc.)

Schedule 1 question- Updated instructions and help text. See the proposed solution below for myFAFSA and fafsa.gov.

fafsa.gov Schedule 1 changes

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| <p>Parents' Schedule 1 Question</p> | <p>Added instruction text to the end of the Parents' Schedule 1 question. The text is dynamic and will display differently depending upon the parents' tax return completion status and marital status.</p> <p>Parents' tax return status is "Already completed"-</p> <p>Answer No if your parents/mother/father did not file a Schedule 1 or only filed a Schedule 1 to report an Alaska Permanent Fund dividend. View other <link>exceptions<link>.</p> <p><u>Parents' tax return status is "Will file"-</u></p> <p>Answer No if your parents/mother/father will not file a Schedule 1 or will only file a Schedule 1 to report an Alaska Permanent Fund dividend. View other <link>exceptions<link>.</p> <p>Links to Parents' Schedule 1 Help topic.</p> |
| <p>Parents' Schedule 1 Help topic</p> | <p>Updated help text to read:</p> <p>Select No if your parents did not and will not file a Schedule 1.</p> <p>Or</p> |

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| | <p>Select No if your parents filed or will file a Schedule 1 but only to report one or more of the following six additions or adjustments to income on Schedule 1:</p> <ol style="list-style-type: none"> 1. Capital gain (Line 13 may not be less than 0) 2. Unemployment compensation (Line 19) 3. Other income to report an Alaska Permanent Fund dividend (Line 21 may not be less than 0) 4. Educator expense (Line 23) 5. IRA deduction (Line 32) 6. Student loan interest deduction (Line 33) <p>Select Yes if your parents filed or will file a Schedule 1 to report additional income or adjustments other than one or more of the six exceptions listed here.</p> <p>If your parents do not know if they filed or will file a Schedule 1, select Don't know.</p> |
| <p>Student Schedule 1 Question</p> | <p>Added instruction text to the end of the Student's Schedule 1 question. The text is dynamic and will display differently depending upon the student's tax return completion status.</p> <p>Student's tax return status is "Already completed"-</p> <p>Answer No if you did not file a Schedule 1 or only filed a Schedule 1 to report an Alaska Permanent Fund dividend. View other exceptions.</p> <p><u>Student's tax return status is "Will file"-</u></p> <p>Answer No if you will not file a Schedule 1 or will only file a Schedule 1 to report an Alaska Permanent Fund dividend. View other exceptions.</p> <p>Links to Student's Schedule 1 Help Topic</p> |
| <p>Student Schedule 1 help topic</p> | <p>Updated help text to read:</p> |

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| | <p>Select No if you (and if married, your spouse) did not or will not file a Schedule 1.</p> <p>Or</p> <p>Select No if you (and if married, your spouse) filed or will file a Schedule 1 but only to report one or more of the following six additions or adjustments to income on Schedule 1:</p> <ol style="list-style-type: none"> 1. Capital gain (Line 13 may not be less than 0) 2. Unemployment compensation (Line 19) 3. Other income to report an Alaska Permanent Fund dividend (Line 21 may not be less than 0) 4. Educator expense (Line 23) 5. IRA deduction (Line 32) 6. Student loan interest deduction (Line 33) <p>Select Yes if you (or if married, your spouse) filed or will file a Schedule 1 to report additional income or adjustments other than one or more of the six exceptions listed here.</p> <p>If you do not know if you filed or will file a Schedule 1, select Don't know.</p> |
| myFAFSA Schedule 1 changes | |
| <p>Parent Filed Schedule 1? View</p> | <p>Added instruction text to the end of the Parents' Schedule 1 question. The myFAFSA question text is dynamic and will differ based on the user role selected (student, parent, preparer), tax return completion status, and marital status.</p> <p>Student: Q. 82 Did/Will your parent/parents file a Schedule 1 with the IRS Form 1040?</p> <p>Answer "No" if your parent/parents did/will not file a Schedule 1 or (will) only file/filed a Schedule 1 to report an Alaska Permanent Fund dividend.</p> <p><link>Learn more about other exceptions<link></p> |

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| | <p>Links to Parents Filed Schedule 1 help topic</p> <p>Parent: Q. 82 Did/Will you file a Schedule 1 with the IRS Form 1040?</p> <p>Answer “No” if you did/will not file a Schedule 1 or (will) only file/filed a Schedule 1 to report an Alaska Permanent Fund dividend.</p> <p><link>Learn more about other exceptions<link></p> <p>Links to Parents Filed Schedule 1 help topic</p> <p>Preparer: Q. 82 Did/Will the parent/parents file a Schedule 1 with the IRS Form 1040?</p> <p>Answer “No” if the parent/parents did/will not file a Schedule 1 or (will) only file/filed a Schedule 1 to report an Alaska Permanent Fund dividend.</p> <p><link>Learn more about other exceptions<link></p> <p>Links to Parents Filed Schedule 1 help topic</p> |
| <p>Student Filed Schedule 1? View</p> | <p>Added instruction text to the end of the Student’s Schedule 1 question. The myFAFSA question text is dynamic and will differ based on the user role selected (student, parent, preparer), tax return completion status, and marital status.</p> <p>Student: Q. 35 Did/Will you (and your spouse) file a Schedule 1 with the 2018 tax return?</p> <p>Answer “No” if you did/will not file a Schedule 1 or (will) only file/filed a Schedule 1 to report an Alaska Permanent Fund dividend.</p> <p><link>Learn more about other exceptions<link></p> <p>Links to Student’s Filed Schedule 1 help topic</p> |

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| | <p>Parent and Preparer: Q. 35 Did/Will the student (and spouse) file a Schedule 1 with the 2018 tax return?</p> <p>Answer “No” if the student did/will not file a Schedule 1 or (will) only file/filed a Schedule 1 to report an Alaska Permanent Fund dividend.</p> <p><link>Learn more about other exceptions<link></p> <p>Links to Student’s Filed Schedule 1 help topic</p> |
| <p>Question 82 Parents Filed Schedule 1 help</p> | <p>Updated help text to read:</p> <p>In general, many people only need to file Form 1040 and no schedules. Select No if the parent (and spouse, if married) did not file a Schedule 1 or filed a Schedule 1 but only reported one or more of the following six additions or adjustments to income on Schedule 1:</p> <ol style="list-style-type: none"> 1. Capital gain (Line 13 may not be less than 0) 2. Unemployment compensation (Line 19) 3. Other income to report an Alaska Permanent Fund dividend (Line 21 may not be less than 0) 4. Educator expenses (Line 23) 5. IRA deduction (Line 32) 6. Student loan interest deduction (Line 33) <p>If the parent (or spouse, if married) filed a Schedule 1 and reported Additional Income or Adjustments to Income on any other lines of Schedule 1 other than one or more of these six exceptions, you must select Yes.</p> |
| <p>Question 35 Student’s Filed Schedule 1 help</p> | <p>Updated help text to read:</p> <p>In general, many people only need to file Form 1040 and no schedules. Select No if the student (and spouse, if married) did not file a Schedule 1 or filed a Schedule 1 but only reported one or more</p> |

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| | <p>of the following six additions or adjustments to income on Schedule 1:</p> <ol style="list-style-type: none"> 1. Capital gain (Line 13 may not be less than 0) 2. Unemployment compensation (Line 19) 3. Other income to report an Alaska Permanent Fund dividend (Line 21 may not be less than 0) 4. Educator expenses (Line 23) 5. IRA deduction (Line 32) 6. Student loan interest deduction (Line 33) <p>If the student (or spouse, if married) filed a Schedule 1 and reported Additional Income or Adjustments to Income on any other lines of Schedule 1 other than one or more of these six exceptions, you must answer “Yes”.</p> |
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Section 2: 20-21 Enhancements communicated in the Federal Register posted April 3, 2019

Changes in this section apply to both fafsa.gov and myFAFSA.

IRS 2018 Tax form changes. In January 2019, the IRS made changes to the forms they provide to taxpayers to file their 2018 taxes. Since the 2020-21 FAFSA form requires income information from the 2018 tax year, adjustments will be made to the FAFSA to accommodate the new law.

The IRS 2018 Tax form changes will require modifications to some FAFSA questions themselves, and those revisions are described in the 2020-21 Paper Enhancements Summary.

The changes outlined below are applicable to both fafsa.gov and myFAFSA:

- The IRS Data Retrieval Tool (DRT) filtering question asking whether a user has filed a Puerto Rican or Foreign Tax Return will be eliminated.
 - Because the new tax law eliminates the 1040A and 1040EZ, the order in which we display the student and parent tax return type questions will change. Those questions will now display after the tax return status question and prior to the tax return filing status question in the corresponding financial sections (e.g., student and parent).
 - Since we’re moving the type of tax return question, the answer to that question will be used to determine eligibility to use the DRT.
- The elimination of the 1040A and 1040EZ forms will require changes to how eligibility for an automatic zero EFC or simplified needs calculation is determined. This change requires a reordering of FAFSA questions. The new question asking whether a taxpayer has filed a Schedule 1 (which replaces the question asking whether a taxpayer was eligible to file a Form 1040A/EZ) will now display before the dislocated worker question.

- The Untaxed Portions of IRA Distributions questions (45e & 94e) and the corresponding questions that ask if the user had a rollover and if so, how much, will be modified to include Untaxed Portions of Pensions. The Untaxed Portions of Pensions questions (45 f & 94f) and the corresponding rollover questions will be deleted.

Changes in this section apply only to fafsa.gov

Synchronization of fafsa.gov and myFAFSA: Regardless of type of device used, ensuring that applicants, parents and preparers have a seamless and unified experience from start to finish when completing a FAFSA form is important. To further enhance the user experience, we will be synchronizing the fafsa.gov and myFAFSA initial application flows. This means that when a user begins an application using myFAFSA and decides to complete the process on fafsa.gov, or vice versa, the user will continue from the same view they were on when the application was last saved.

The following changes will be made to views within fafsa.gov for initial and renewal applications to align with the myFAFSA presentation of questions:

- Questions in the “Student Demographics, Dependency, and Financial Information” sections will be rearranged
- Because the student will have provided their date of birth, marital status and grade level already, the “Student Age/Marital Status/Degree Confirmation” view to determine dependency will no longer display to the student
- The “Student Marital Status” view will be moved from the “Student Demographics” section to the first view in the “Dependency Status” section
- The Special Circumstances views will be condensed
- The “Financial Information” section will be split into separate sections each for student and parent
- The “Parents’ Other Untaxed Income” field will be moved to the end of the “Parent Untaxed Income” view
- The “Student’s Other Untaxed Income” and “Money Received or Paid on the Student’s Behalf” fields will be moved to the end of the “Student Untaxed Income” view
- The fields displayed on the FAFSA Summary will be reordered to match the order they were presented on the web

Masking of social security numbers on the Login view: To protect personally identifiable information, social security numbers will now be masked on the Login view. When typing a social security number on the Login view the numbers will be masked by default. There will be a hide/show feature that allows users to either hide or show the numbers that they have typed.