
Summary of Changes for the Application Processing System

2015–2016

U.S. Department of Education



F E D E R A L
S T U D E N T A I D

TABLE OF CONTENTS

INTRODUCTION.....	1
Overview	1
MAJOR CHANGES	3
Description of Major Changes	3
Improved Guidance to Pacific Islander Applicants	3
Enhanced Communication to Foster Youth	4
Clarified Definition of a Parent	4
Clarified Definition of Separated Parents	5
Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant) Changes	5
CPS NSLDS Match Changes	5
FSA ID (User Name and Password) to Replace PIN.....	7
2015-2016 APPLICATION PROCESSING SYSTEM SCHEDULE	8
Schedule for the 2015-2016 Application Processing System.....	8
SUMMARY OF CHANGES TO THE 2015-2016 PAPER FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA®) AND FAFSA ON THE WEB.....	13
2015-2016 FAFSA® and FAFSA on the Web Worksheet Availability.....	13
FAFSA®	13
FAFSA on the Web Worksheet.....	14
2015-2016 Paper FAFSA® Changes	15
2015-2016 FAFSA on the Web Changes and Enhancements	17
Improved Guidance to Pacific Islander Applicants	17
Enhanced Communication to Foster Youth	18
Eliminating eSAR Pop-up Blocker Interference	18
Clarified Definition of a Parent	19
Clarified Definition of Separated Parents	19
Enhanced IRS Data Retrieval Tool (IRS DRT) Instructions	19
Expanded School Selection Instructions.....	20
We Value Your Comments and Suggestions!	21
SUMMARY OF CHANGES TO FAA ACCESS TO CPS ONLINE	22
Enrollment Requirements	22
FAA Access to CPS Online.....	22
R2T4 on the Web.....	23
ISIR Analysis Tool	23

EDExpress 2015-2016 FAA Access Interface	24
FAA Access Application Processing Changes	25
Improved Guidance to Pacific Islander Applicants	25
Enhanced Communication to Foster Youth	25
Clarified Definition of a Parent	26
Clarified Definition of Separated Parents	26
CPS NSLDS Match Changes	27
Reordered IRS Display Flags	27
Identity Verification Results	29
SUMMARY OF CHANGES TO THE 2015-2016 CPS	30
Overview	30
Database Matches	31
National Student Loan Data System (NSLDS)	31
CPS Edits	32
Need Analysis	33
Application Output Sent to Students	34
SAR Changes	34
SAR Acknowledgement Changes	34
Paper Output Changes	34
SAR Comments	35
Mailing Addresses	36
GETTING HELP	37
Customer Service	37
FSATECH Listserv	37
CPS/SAIG Technical Support	37
Federal Student Aid Information Center (FSAIC)	37
Reach FSA	38
Federal Student Aid's Research and Customer Care Center (RCCC)	38
CPS Web Applications Demonstration System	39
Other Helpful Documents	40
Federal Student Aid Web Sites	42

Introduction

Overview

The *Summary of Changes for the Application Processing System* is designed to meet the reference needs of financial aid administrators (FAAs), programmers, and data processing staff. In this guide, we describe updates and enhancements to the 2015-2016 application processing system and to student and school Web products. We recommend you review the information provided in this guide, as some enhancements may require you to modify your office procedures and system operations.

Note: At the time this document was posted, the paper FAFSA was still going through the OMB clearance process. As a result, there could be additional changes not identified here.

The following sections are included in this guide:

- **Major Changes** – This section provides information about major changes for the 2015-2016 processing year and covers the following topics:
 - Improved Guidance to Pacific Islander Students
 - Enhanced Communication to Foster Youth
 - Clarified Definition of a Parent
 - Clarified Definition of Separated Parents
 - Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant) Changes
 - CPS National Student Loan Data System (NSLDS) Match Changes
 - FSA ID (User Name and Password) to Replace PIN
- **2015-2016 Application Processing System Schedule** – This section provides important processing deadlines and anticipated document and software release dates.
- **Summary of Changes to the 2015-2016 Paper *Free Application for Federal Student Aid* (FAFSA®) and FAFSA on the Web** – This section provides descriptions of the FAFSA and FAFSA on the Web Worksheet, including information about requesting and receiving paper forms and downloading electronic forms. It also describes changes to the 2015-2016 paper FAFSA and to the FAFSA on the Web site.
- **Summary of Changes to FAA Access to CPS Online** – This section provides information about FAA Access to CPS Online (FAA Access) enrollment requirements and changes to the FAA Access Web site.

- **Summary of Changes to the 2015-2016 Central Processing System** – This section provides information about changes to the Department of Education’s Central Processing System (CPS). The following areas are described:
 - Database Matches
 - CPS Edits
 - Need Analysis
 - Application Output Sent to Students
 - Student Aid Report (SAR) Comments
- **Getting Help** – This section provides contact information for customer service and lists useful documents and Web sites you can access for additional assistance.

In addition to our annual 2015-2016 system updates that are implemented in January 2015, we plan to release additional system updates intermittently. Scheduling intermittent releases enables us to continuously improve our Web sites and other systems.

We will describe enhancements to be implemented during the processing cycle in various future communications posted on the Information for Financial Aid Professionals (IFAP) Web site at ifap.ed.gov, including electronic announcements and updated guides and references.

Unless otherwise noted, we are implementing the changes described in this guide in January 2015, at the start of the 2015-2016 processing cycle.

Major Changes

Description of Major Changes

In this section, we describe major changes to the application processing system and Web products for 2015-2016, including updates and enhancements resulting from annual and legislative changes. Policy and operational guidance can also be found on the IFAP Web site.

Improved Guidance to Pacific Islander Applicants

Login rules enable an applicant to log in to FAFSA on the Web with a pseudo Social Security Number (SSN) created in *any* cycle. It is important that *returning* FAFSA filers from one of the Pacific Island groups (applicants from the Federated States of Micronesia, the Republic of the Marshall Islands, or Palau) submit the subsequent FAFSA under the same nine-digit pseudo SSN assigned originally by the CPS when the earlier cycle's FAFSA was processed. The use of the same pseudo SSN for each cycle enables the Common Origination and Disbursement (COD) System to calculate the Pell Grant lifetime eligibility limit information more accurately.

In our effort to reduce the number of Pacific Islander applicants who generate another pseudo SSN unnecessarily when applying for aid in a subsequent year, we enhanced the FAFSA on the Web login process by adding a new "From a Freely Associated State?" hyperlink next to the Social Security Number field on the FAFSA on the Web Login page.

When an applicant clicks the "From a Freely Associated State?" hyperlink, we direct the applicant to the "Citizens of the Marshall Islands, Federated States of Micronesia, and Palau" help topic. This help topic informs the applicant what to do if he or she does not have a Social Security Number, how to log in before or after a pseudo SSN is assigned, and how to find the pseudo SSN on the Sign & Submit page. The new hyperlink reduces the navigation steps previously required to access the help topic and, therefore, the guidance is more accessible to the applicant.

In addition, when a pseudo SSN is assigned, we now display a message to identify the newly assigned pseudo SSN and to inform the applicant that he or she should save the pseudo SSN for logging back in to the FAFSA and for starting a new FAFSA in the future.

See the [November 20, 2013 electronic announcement](#) regarding the use of Pseudo SSNs for Pacific Islander FAFSA Submission for more information about the importance of using the same pseudo SSN for each cycle.

Enhanced Communication to Foster Youth

We are implementing legislative changes to help us identify and notify applicants who are or were in the foster care system of their potential eligibility for federal student aid, including assistance through federal programs for foster youth, such as the John H. Chafee Foster Care Independence Program and the Education and Training Voucher (ETV) Program.

New application processing edits generate SAR comment codes 165 and 166. Comment codes and text are included on the SAR, SAR Acknowledgement, and eSAR (HTML and PDF) and in Student Inquiry. The comment codes are also included on the ISIR, on the FAA Information and Comments pages in FAA Access, and in ISIR Compare.

The comment text informs any applicant identified as a foster youth or someone who was in the foster care system that he or she may be eligible for assistance through federal programs for foster youth. It also provides a URL (childwelfare.gov/pubs/reslist/rl_dsp.cfm?rs_id=38&rate_chno=W-00143) where the applicant can find contact information for his or her state ETV coordinator.

Non-FAFSA on the Web filers who respond **Yes** to the “At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?” dependency question, receive comment code 165.

In FAFSA on the Web, we added a new question, “Are you a foster youth or were you at any time in the foster care system?” The new question, described in more detail in the 2015-2016 FAFSA on the Web Changes and Enhancements section of this document, enables a FAFSA on the Web applicant to self-identify as a foster youth or a youth who was in the foster care system. These students receive comment code 166.

The applicant’s response to the new foster youth question is included on the List of Changes page and the Application Summary Report. Only FAFSA on the Web filers are asked this question and therefore, the applicant’s response to this question is *not* included on the ISIR. Applicants who answer **Yes** can be identified by the presence of comment code 166.

Clarified Definition of a Parent

We made important updates to the help topics to provide applicants and FAAs with additional guidance about whose information should be included in the Parent Finances pages. In FAFSA on the Web and FAA Access, we modified help topics that define a legal parent by adding the following example for “a person that the state has determined to be a legal parent”: for example, when a state allows another person’s name to be listed as a parent on a birth certificate.

In addition, we added widowed stepparents to the list of persons that would *not* be considered parents unless they have legally adopted the applicant.

Similar changes are included on the paper FAFSA. See the 2015-2016 Paper FAFSA Changes section in this guide for more information.

Clarified Definition of Separated Parents

We made important updates to the help topics to provide applicants and FAAs with additional guidance to determine if parents are considered separated. In FAFSA on the Web and FAA Access, we modified help topics to describe that for FAFSA purposes, a married couple is separated if the couple is considered legally separated by a state, or if the couple is legally married but has chosen to live separate lives, including living in separate households, as though they were not married. If you and your spouse are separated but living together, select “Married or Remarried,” not “Divorced or Separated.”

Note: When two married persons live as a married couple **but are separated by physical distance (or have separate households), they are considered married for FAFSA purposes.**

Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant (National SMART Grant) Changes

The funding for ACG and National SMART Grant programs ended after the 2010-2011 school year. Enough time has passed that there are no longer disbursements under these programs. As a result, we are modifying our systems to remove the grant information from our systems and Web sites to remove functionality and fields related to ACG and the National SMART Grant, including the edits, comment codes and text, and output, such as ISIRs, eSARs, SARs, and SAR Acknowledgements.

CPS NSLDS Match Changes

We modified our NSLDS prescreening and postscreening match processes to implement the legislative and programmatic changes described below.

Prescreening Changes

In addition to the removal of the ACG and National SMART Grant information from the ISIR and associated systems (see previous major change), we made the following prescreening changes:

- **Two New Fields** – We added two new fields to the ISIR file. The new fields are part of each of the six loan records:
 - **Confirmed Loan Subsidy Status** – This field is used to indicate the confirmed status of the interest subsidy on a loan. The valid values for this field are:
 - L = Lost Subsidy
 - R = Reinstated Subsidy

N = Not applicable for non-D0 loans (Direct Stafford Subsidized [SULA Eligible]) or no change to subsidy status for D0 loans

Blank

- **Subsidy Status Date** – This field is used to identify the date a Confirmed Loan Subsidy Status was confirmed. The valid values for this field are:

Numeric (CCYYMMDD)

N/A

Blank

- **New “P1” Loan Program Code** – We added a new loan program code, **P1**, to identify Direct Perkins Loans, a loan program we may implement in the future. The loan program codes are sent by NSLDS to CPS and included on the ISIR. The loan program codes are also displayed on the SAR, SAR Acknowledgement, eSAR, and in Student Inquiry.
- **New “R” value for Loan Limit Flag Fields** – A new loan limit flag value, **R**, identifies loans that exceeded the loan limit and for which the debt was reaffirmed. The loan limit flag fields are sent by NSLDS to CPS and included on the ISIR. This value is included in the four limit flag fields listed below:
 - NSLDS Undergraduate Subsidized Loan Limit Flag
 - NSLDS Undergraduate Combined Loan Limit Flag
 - NSLDS Graduate Subsidized Loan Limit Flag
 - NSLDS Graduate Combined Loan Limit Flag

SAR comment code 392 is included on the student’s record if he or she is a graduate student who reaffirmed the debt and comment code 393 identifies an undergraduate student who reaffirmed the debt. Comment codes and text are included on the SAR, SAR Acknowledgement, and eSAR (HTML and PDF) and in Student Inquiry. The comment codes are also included on the ISIR, on the FAA Information and Comments pages in FAA Access, and in ISIR Compare.

Postscreening Changes

Periodically, NSLDS transmits a file to the CPS containing records that have been sent to NSLDS previously for prescreening and subsequently had a status change in the NSLDS database affecting the student’s eligibility for financial aid. As part of this postscreening process, NSLDS returns a Postscreening Reason Code to explain the change in information. The postscreening changes for 2015-2016 include the following:

- **Two New Postscreening Reason Code Values** – We added two new postscreening reason codes; the values for the new postscreening reason codes are:
 - 26 = Confirmed loan subsidy status change
 - 27 = Decrease in subsidized usage period
- **Revised Three Postscreening Code Values** – We revised the descriptions associated with three existing postscreening reason codes; the revised descriptions are:

- 11 = Exceeding subsidized loan limit resolved
(formerly No longer exceeding subsidized loan status)
- 12 = Exceeding combined loan limit resolved
(formerly No longer exceeding combined loan limit)
- 13 = For Federal Student Aid use only
(formerly Change in type of disability discharged loan)

FSA ID (User Name and Password) to Replace PIN

In the spring of 2015, we will make changes to how applicants and parents authenticate their identities within Federal Student Aid Web sites that currently use the PIN. Rather than entering his or her Social Security Number, name, date of birth and PIN to perform functions such as starting a renewal FAFSA, signing a FAFSA, making FAFSA corrections, or accessing the IRS Data Retrieval Tool, a user will enter a new FSA ID. In addition to eliminating the need to provide personally identifiable information (PII) to access FSA systems, the new FSA ID, which consists of a user name and password, will resolve the issue of multiple PIN assignments for one individual when identifiers change due to life circumstances and improve self-help options for the user by providing password retrieval by e-mail.

These changes will not affect how FAAs access our systems. FAAs will continue to log in to FAA Access using their current FSA User IDs and passwords.

Watch the IFAP Web site for upcoming communications that provide additional information about the implementation of the FSA ID system for applicants and parents using FAFSA on the Web.

2015-2016 Application Processing System Schedule

Schedule for the 2015-2016 Application Processing System

Date	Event
May 30, 2014	The Secretary of Education announces the annual updates to the tables used in the statutory “Federal Need Analysis Methodology” to determine an applicant’s Expected Family Contribution (EFC) for the 2015-2016 Award Year (May 30, 2014 [79 FR 31103]).
July 24, 2014	<p>Federal Student Aid announces the availability of the 2015-2016 Electronic Data Exchange (EDE) Technical Reference draft (including the ISIR Record Layout and ISIR Cross-Reference) on the IFAP and FSAdownload Web sites.</p> <p>The <i>EDE Technical Reference</i> provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid.</p>
July 31, 2014	<p>Federal Student Aid announces the availability of the 2015-2016 Application Processing System Specifications for Software Developers on the IFAP and FSAdownload Web sites.</p> <p>The <i>Application Processing System Specifications for Software Developers</i> provides CPS system edits that can assist you in designing and building your own software to communicate with Federal Student Aid.</p>

Schedule for the 2015-2016 Application Processing System (Continued)

Date	Event
September 2, 2014	Federal Student Aid announces the availability of the EFC Formula Guide on the IFAP Web site, pending final 2014 IRS tax legislation. This guide can be used to calculate an EFC.
September 9, 2014	Federal Student Aid announces the availability of the EDEXpress for Windows Packaging Technical Reference on the FSAdownload Web site. The <i>Packaging Technical Reference</i> provides instructions and record layouts for schools and other organizations that need to integrate their software or systems with the EDEXpress 2015-2016 Packaging module (available January 2015). Record layouts are included for all imports from external systems, such as Packaging Import External Add, Packaging Import External Change, and Packaging Import Add Funds. Packaging module setup guidance and setup worksheets are also provided.
September 18, 2014	Federal Student Aid announces the availability of the FAFSA MyStudentData Download guide on the IFAP Web site. This guide includes the record layout for the FAFSA MyStudentData download file, which is available for students who file a FAFSA using the <i>FAFSA on the Web</i> site and have valid Federal Student Aid PINs and processed FAFSAs. The file includes a student's processed results in a machine-readable, plain text file.
October 6, 2014	Federal Student Aid announces the availability of the 2015-2016 CPS Test System User Guide on the FSAdownload Web site. This user guide describes the CPS Test System, a system in which you can test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment). The test system will be available on December 28, 2014.
October 7, 2014	Federal Student Aid announces the availability of the 2015-2016 ISIR Guide on the IFAP and FSAdownload Web sites. The <i>ISIR Guide</i> assists FAAs in interpreting applicant information from an ISIR.
October 8, 2014	Federal Student Aid announces the availability of the 2015-2016 Electronic Data Exchange (EDE) Technical Reference on the IFAP and FSAdownload Web sites. The <i>EDE Technical Reference</i> provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid. The <i>EDE Technical Reference</i> includes information about record layouts, required edits, printing, and reject messages.

Schedule for the 2015-2016 Application Processing System (Continued)

Date	Event
October 28, 2014	Federal Student Aid announces the availability of the 2015-2016 SAR Comment Codes and Text guide on the IFAP and FSAdownload Web sites. The <i>SAR Comment Codes and Text</i> guide provides the SAR comment codes, comment text, reject resolutions, and database match information.
October 30, 2014	Federal Student Aid posts an electronic announcement asking schools to remind applicants to update their e-mail addresses in the CPS by January 12, 2015, so that Renewal Reminders can be sent to the correct e-mail address.
October 31, 2014	The 2015-2016 Federal School Code List is available online on the IFAP Web site and is updated quarterly.
Mid-November 2014	In preparation for the 2015-2016 processing cycle, postsecondary schools, high schools, libraries, and community agencies can begin to place orders for the FAFSA on the Web Worksheet from Federal Student Aid's online publications ordering system (FSAPubs) located at FSAPubs.gov . The worksheet is a tool to assist applicants and parents who complete their FAFSAs on the Web and generally follows the flow and logic of the online application. FSAPubs is your source for real-time information about Federal Student Aid's publications and their availability.
December 2014	Federal Student Aid begins shipping orders of the 2015-2016 FAFSA on the Web Worksheet from Federal Student Aid's online publications ordering system located at FSAPubs.
December 28, 2014	The 2015-2016 CPS Web Applications Demo System is available at fafsademo.test.ed.gov . The user name is "eddemo" and the password is "fafsatest."
December 28, 2014	The CPS Test System is available. You can test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment).
December 28, 2014	The PDF version of the FAFSA is available for download from the FAFSA on the Web site. Schools can also access the PDF from our Web sites, including FSAPubs.
December 28, 2014	The PDF version of the FAFSA on the Web Worksheet is available to applicants on the FAFSA on Web site (fafsa.gov) and to schools on the IFAP Web site.
January 1, 2015	The 2015-2016 FAA Access to CPS Online Web site (faaaccess.ed.gov) is available to FAAs.

Schedule for the 2015-2016 Application Processing System (Continued)

Date	Event
January 1, 2015	The 2015-2016 FAFSA on the Web site is available to applicants.
January 2, 2015	The 2015-2016 CPS begins processing.
January 2, 2015	EDExpress for Windows 2015-2016, Release 1.0, which includes Global, Application Processing, and Packaging functionality for the 2015-2016 processing cycle, is posted to the FSAdownload Web site.
Early January 2015	Applicants and parents can begin requesting up to three copies of the paper FAFSA from the Federal Student Aid Information Center (FSAIC) by calling 800/4-FED-AID (800/433-3243) .
January 12, 2015	<p>For applicants to receive a 2015-2016 Renewal Reminder, any needed corrections to 2014-2015 applicant records must be made by January 12, 2015. These corrections can include updating e-mail address or resolving 2015-2016 renewal eligibility issues, such as rejects. For example, if an applicant does not have a 2014–2015 transaction with an EFC because all transactions have reject codes, the rejects must be corrected by January 12, 2015 to create a valid transaction so that the applicant receives a reminder notification for the new award year.</p> <p>You can continue to submit 2014-2015 applications and correction transactions for 2015-2016 renewal eligibility purposes after January 12, 2015, but affected applicants do not receive Renewal Reminders. These applicants have access to their renewal FAFSA data, however.</p>
January 15, 2015 – January 22, 2015	Renewal Reminders are sent to renewal-eligible applicants with a valid e-mail address who have not yet filed a 2015-2016 FAFSA.
January 2015	Federal Student Aid announces the availability of the final <i>2015-2016 Application Processing System Specifications for Software Developers</i> on the IFAP and FSAdownload Web sites.
February 1, 2015	The Internal Revenue Service Data Retrieval Tool (IRS DRT) is available to applicants.
Late March 2015	EDExpress for Windows 2015-2016, Release 2.0, which includes the William D. Ford Federal Direct Loan (Direct Loan), Federal Pell Grant (Pell Grant) and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules for the 2015-2016 cycle, is posted to the FSAdownload Web site.

Schedule for the 2015-2016 Application Processing System (Continued)

Date	Event
April 2015	<p>The 2015-2016 ISIR Analysis Tool is available on the FAA Access to CPS Online Web site. The ISIR Analysis Tool is designed for FAAs at any school who want to review and analyze the school's ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (federally selected or defined by the school).</p> <p>At this time, ISIR Analysis Tool options are also added to the CPS Web Applications Demo System, located at fafsademo.test.ed.gov. You must provide your institution's Federal School Code, the user name ("eddemo"), and password ("fafsatest") to access the demo version of the ISIR Analysis Tool.</p>
Mid-June 2015	<p>Direct Loan (DL) Tools for Windows, Release 15.0, is posted to the FSAdownload Web site. DL Tools is a supplemental software product for Direct Loan participants and contains Rebuild, Cash Management, and Compare functionalities for the 2013-2014, 2014-2015, and 2015-2016 cycles.</p>
Late June 2015	<p>The CPS accepts 2014-2015 paper and electronic FAFSAs and renewal FAFSAs until late June 2015. Watch the IFAP Web site for a Federal Register Notice with the final deadline. Electronic FAFSAs must be transmitted to and received by the CPS by midnight Central Time (CT) to meet the deadline.</p>
Mid-September 2015	<p>The CPS accepts 2014-2015 paper and electronic corrections until mid-September 2015. Watch the IFAP Web site for a Federal Register Notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.</p>
Late June 2016	<p>The CPS accepts 2015-2016 paper and electronic FAFSAs until late June 2016. Watch the IFAP Web site for a Federal Register Notice with the final deadline. Electronic FAFSAs must be transmitted to and received by the CPS by midnight CT to meet the deadline.</p>
Mid-September 2016	<p>The CPS accepts 2015-2016 paper and electronic corrections until mid-September 2016. Watch the IFAP Web site for a Federal Register Notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.</p>

Summary of Changes to the 2015-2016 Paper Free Application for Federal Student Aid (FAFSA®) and FAFSA on the Web

2015-2016 FAFSA® and FAFSA on the Web Worksheet Availability

FAFSA®

While most applicants use FAFSA on the Web to apply for financial aid, paper application options are still available. The paper FAFSA is a ten-page form (six application pages and four instructional pages) used to apply for Title IV aid. The FAFSA is also available as an electronic PDF document that can be printed and submitted by postal mail.

Paper FAFSA Request

Beginning in early 2015, applicants and parents can request up to three copies of the paper FAFSA (in English or Spanish) by calling the Federal Student Aid Information Center (FSAIC) toll-free at **800/4-FED-AID (800/433-3243)**.

PDF FAFSA Availability

The PDF FAFSA is an official FAFSA that can be completed on the computer and printed, or it can be printed and completed by hand. The printed and signed PDF FAFSA is mailed to Federal Student Aid for processing or, in some instances, can be delivered to a school where the student's application data is entered and submitted using FAFSA Access or third-party software. The signed FAFSA is stored by the school according to Federal Student Aid's record retention requirements.

English and Spanish 508-compliant PDF versions of the 2015-2016 FAFSA will be available online for download in late December 2014 from the IFAP Web site. Schools can also access the PDF FAFSA from our Web sites, including FSAPubs (in late December 2014) and FAFSA on the Web (on December 28, 2014), by selecting the PDF link from the "Other Filing Options" link.

FAFSA on the Web Worksheet

The FAFSA on the Web Worksheet is a tool that applicants can use to prepare for completing the online application process. The FAFSA on the Web Worksheet is a paper or electronic PDF document that presents some of the FAFSA questions in the order in which they appear on FAFSA on the Web. This form is available for orders or printed from the Web.

The 2015-2016 FAFSA on the Web Worksheet is available for order by schools. We recommend you continue to remind applicants and their parents that the worksheet is not a FAFSA and is not processed as such if submitted.

FAFSA on the Web Worksheet Paper Request

Orders for the 2015-2016 FAFSA on the Web Worksheet can be placed beginning mid-November 2014. At that time, postsecondary schools, high schools, libraries, and community agencies can order copies of the FAFSA on the Web Worksheet on the FSAPubs Web site. Distribution begins in mid-December 2014. Additional worksheets can be ordered from the FSAPubs Web site throughout the processing year.

FAFSA on the Web Worksheet PDF Availability

The FAFSA on the Web Worksheet will also be available in PDF in late December 2014 on StudentAid.gov and the IFAP Web site, and on December 28, 2014 on FAFSA on the Web.

2015-2016 Paper FAFSA® Changes

This section describes changes and enhancements to the *paper* 2015-2016 FAFSA. At the time this document was posted, the paper FAFSA was still going through the OMB clearance process. As a result, there could be additional changes not identified here.

We implemented the following changes to the paper FAFSA:

- **Colors** – The 2015-2016 FAFSA colors are yellow for student information and purple for parent information.
The student color of the FAFSA continues with the four-year color rotation of blue → yellow → orange → green. Purple continues to be the color for parent information.
- **IRS Tax form Line Numbers** – We updated the income tax line numbers for IRS Forms 1040 and 1040A in questions 37 and 86 to lines 56 and 39, respectively. We also updated the income tax line numbers for IRS Forms 1040 and 1040A in questions 44a and 93a to lines 50 and 33, respectively.

Page 2

- **Enhanced Notes for Questions 14 and 15** – We added instructions for applicants who have been granted Deferred Action for Childhood Arrivals (DACA).
- **Enhanced Notes for Questions 21 and 22** – We added instructions for answering question 21, “Are you male or Female?” clarifying that any person assigned the sex of male at birth is to be registered with the Selective Service system when applying for student aid.
- **Enhanced Notes for questions 42 and 43 (page 4), 45j (page 5), and 91 and 92 (page 7)** – We updated the “Money received, or paid on your behalf” paragraph to include non-custodial parents as an example of someone other than a student’s parents who could own a 529 college savings plan.

Page 3

- **Revised Question 13, Student’s E-mail Address** – We removed the prefilled “@” from the e-mail question response box to allow greater flexibility when providing a response.
- **Added “See Notes page 2” for question 21** – We added instructions for answering the “Are you male or female?” question.

Page 6

- **Updated Step Four (Parent) Instructions** – We updated the definition of a legal parent to include someone as determined by the state, for example a parent listed on the birth certificate. We also clarified that a widowed stepparent is not considered a parent for the FAFSA unless he or she legally adopted the applicant.
- **Revised Question 69, Parents’ E-mail Address** – We removed the prefilled “@” from the e-mail question response box to allow greater flexibility when providing a response.
- **Revised Question 74, Parents’ Number in the Household** – We added the clarifying sentence “Do not include siblings who are in U.S. military service academies.”

Page 8

- **Updated Step Six Instructions for Adding Colleges** – We added additional instructions that read, “The information you report on the FAFSA is sent to each college listed, including the names of the other colleges listed. If you do not want this information sent to a particular college, do not list that school. For federal student aid purposes, it does not matter in what order you list your selected schools.”
- **Updated PIN References** – Due to Federal Student Aid’s initiative to replace the PIN with the new FSA ID, we revised references to the PIN to include the statement “username and password, and/or other credential.” See the “Major Changes” section in this guide for more information about this initiative.

Page 9

- **Enhanced Notes for question 53 (page 5)** – We updated the first bullet for a parent to read, “You had no living parent, even if you are now adopted.”
- **Enhanced Notes for Step Four, questions 59-94 (pages 6 and 7)** – We updated the first sentence in the second bullet for legal parent to read, “If your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]) are not married and live together, select...”
- **Enhanced Notes for Question 84 and 102** – We expanded the definition of a dislocated worker to include conditions for the spouse of an active duty member of the Armed Forces.

Page 10

- **Updated “What is the FAFSA? How can I have more colleges receive my FAFSA information?”** – We removed the reference to the PIN in Step 1.
- **Updated the “Information on the Privacy Act and use of your Social Security Number” Text** – We updated the Paperwork Reduction Act text and the public reporting burden estimate.

2015-2016 FAFSA on the Web Changes and Enhancements

In the “Major Changes” section earlier in this guide, we described some of the 2015-2016 changes to FAFSA on the Web. In this section, we provide more information about the changes as they relate to FAFSA on the Web. These topics include:

- Improved guidance to Pacific Islander applicants
- Enhanced communication to foster youth
- Clarified definition of a parent
- Clarified definition of separated parents

We discuss other changes for 2015-2016 in this section that apply only to FAFSA on the Web:

- Eliminated eSAR pop-up blocker interference
- Enhanced IRS Data Retrieval Tool (IRS DRT) instructions
- Expanded school selection instructions

Improved Guidance to Pacific Islander Applicants

In the “Major Changes” section of this document, we discuss the changes made to encourage returning Pacific Islander applicants (applicants who are citizens of the Marshall Islands, Federated States of Micronesia, or Palau) to reuse their initial pseudo SSNs. Reuse of initial pseudo SSNs reduces the number of applicants assigned multiple pseudo SSNs and makes it easier for applicants to remember and reuse their initial pseudo SSNs throughout their postsecondary education enrollment.

In this section, we describe the following changes to FAFSA on the Web, which support this effort:

- “From a Freely Associated State?” hyperlink next to the Social Security Number field on the FAFSA on the Web Login page
- Message displayed to the student when a pseudo SSN is assigned

We added the “From a Freely Associated State?” hyperlink next to the Social Security Number field on the FAFSA on the Web Login page to make special instructions for Pacific Islander applicants more prominent. When the applicant clicks the hyperlink, we direct him or her to the Citizens of the Marshall Islands, Federated States of Micronesia, and Palau help topic and provide the following information:

- What the applicant should do if he or she does not have an SSN
- How to log in before or after a pseudo SSN is assigned
- How to find the pseudo SSN on the Sign & Submit page

When we assign a pseudo SSN in FAFSA on the Web, we display a new message to the applicant from the Sign & Submit page. The message identifies the applicant's pseudo SSN and reminds the applicant to save the pseudo SSN for logging back in to the FAFSA and for starting a new FAFSA in the future.

See the [November 20, 2013 electronic announcement](#) regarding the use of pseudo SSNs for Pacific Islander FAFSA submission for more information about the importance of using the same pseudo SSN for each cycle.

Enhanced Communication to Foster Youth

In the “Major Changes” section of this document, we discuss legislative changes implemented to help us identify and notify applicants who are or were in the foster care system of their potential eligibility for federal student aid, including eligibility for assistance through federal programs for foster youth. In this section, we describe the changes made to FAFSA on the Web.

We added a new question to FAFSA on the Web, “Are you a foster youth or were you at any time in the foster care system?” The new question enables a FAFSA on the Web applicant to self-identify as a foster youth. Applicants who self-identify as foster youth receive Comment 166 on the eSAR (HTML or PDF).

Comment 166 informs the applicant that he or she may be eligible for assistance through federal programs for foster youth, such as the John H. Chafee Foster Care Independence Program and the Education and Training Voucher (ETV) Program. In addition, the comment provides a URL (childwelfare.gov/pubs/reslist/rl_dsp.cfm?rs_id=38&rate_chno=W-00143) where the applicant can find contact information for his or her state ETV coordinator.

The new question is displayed on the Basic Eligibility page in Student Application Entry and on the Student Demographics – Corrections page in Student Correction Entry. Valid responses to the question are **Yes**, **No**, and blank. If the applicant's response is **Yes**, we display a message similar to the comment text on the Confirmation page.

The applicant's response to the new foster youth question is included on the List of Changes page and the Application Summary Report. Only FAFSA on the Web filers are asked this question and therefore, the applicant's response to this question is *not* included on the ISIR. Applicants who answer **Yes** can be identified by the presence of comment code 166.

Eliminating eSAR Pop-up Blocker Interference

We have redesigned online access to the eSAR to eliminate the confusion caused previously when pop-up blocker settings blocked access to the eSAR. FAFSA on the Web now displays the eSAR HTML in the applicant's current browser window. From a new button on the eSAR HTML, the applicant can then open the eSAR PDF in a new browser window.

We implemented the following modifications to the 2014-2015 and 2015-2016 processing systems to support the redesign:

- We replaced the “Student Aid Report (PDF)” and “Student Aid Report (HTML)” hyperlinks on the My FAFSA page and on the Correction History page with a new “View or Print your Student Aid Report (SAR)” hyperlink.
- We added a View Student Aid Report (PDF) button to the eSAR HTML to provide access the eSAR PDF. When the applicant selects the button, the eSAR PDF opens in a new browser window.
- We replaced the Close Window button on the eSAR HTML with a Previous button. When the applicant selects the new button, he or she is returned to the page where the “View or Print your Student Aid Report (SAR)” hyperlink was selected. In Student Application Entry, this is the My FAFSA page. In Student Correction Entry, this is the Correction History page.

We will implement the changes to the 2014-2015 processing system on December 28, 2014. The 2015-2016 functionality will be available with system startup, on January 1, 2015.

Clarified Definition of a Parent

We made important updates to the help topics to provide applicants with additional guidance about whose information should be included in the Parent Finances pages. In FAFSA on the Web, we modified help topics that define a legal parent by adding the following example for “a person that the state has determined to be a legal parent”: for example, when a state allows another person’s name to be listed as a parent on a birth certificate.

In addition, we added widowed stepparents to the list of persons that would *not* be considered parents unless they have legally adopted the applicant.

Clarified Definition of Separated Parents

We made important updates to the help topics to provide applicants with additional guidance to determine if parents are considered separated. For FAFSA purposes, a married couple is separated if the couple is considered legally separated by a state, or if the couple is legally married but has chosen to live separate lives, including living in separate households, as though they were not married. If you and your spouse are separated but living together, select “Married or Remarried,” not “Divorced or Separated.”

Note: When two married persons live as a married couple **but are separated by physical distance (or have separate households), they are considered married for FAFSA purposes.**

Enhanced IRS Data Retrieval Tool (IRS DRT) Instructions

We made the following changes to the IRS Data Retrieval Tool (IRS DRT) as part of our continuous effort to improve the accuracy of data transferred from the IRS to FAFSAs:

- Modified amended tax return filing status question
- Added a link to the “How you filed your taxes” help topic

Modified Amended Tax Return Filing Status Question

In FAFSA on the Web, we ask applicants and parents several filtering questions before we display the IRS DRT. The responses to these questions enable us to limit the transfer of financial information from the IRS DRT that may no longer reflect the applicant or parents' current financial status as of the day the FAFSA is completed.

For 2015-2016, we modified the IRS DRT filtering questions that relate to applicants and parents who have filed an amended tax return to specify a Form 1040X. The Parent Finances 1, Student Finances 1, Parent Finances – Corrections, and Student Finances – Corrections pages, which previously asked the user if he or she filed an amended tax return, now ask the user if he or she filed a Form 1040X amended tax return.

Added Link to “How you filed your taxes” Help Topic

On the Parent Finances 1, Student Finances 1, Parent Finances – Corrections, and Student Finances – Corrections pages, we added a statement to inform applicants and parents that how they filed their taxes can affect whether their tax information is available to transfer from the IRS. The statement includes a link to the “How you filed your taxes” help topic for further information.

Expanded School Selection Instructions

We expanded the instructions on the School Selection and School Selection Summary pages to provide applicants with more information about how the school choices are used.

On the School Selection page, we now explain that information reported on the FAFSA, including the names of other colleges, will be sent to each college listed on the FAFSA. Furthermore, we instruct applicants not to list a school on the FAFSA if they do not want this information sent to that particular school.

On the School Selection Summary page, we added text to describe how the First, Last, Up, and Down buttons can be used to change the position of a particular school. We explain that for federal student aid purposes, it does not matter in what order a selected school is listed. We also recommend that applicants check with their state grant agency for more information on state grant aid programs.

We Value Your Comments and Suggestions!

Federal Student Aid continually seeks new and innovative ways to make applying for financial aid easier and more convenient for applicants and their parents. Some of the changes we made to the 2015-2016 paper FAFSA and Web applications were the result of feedback and comments we received from you. As always, we appreciate your contributions to improving our systems and processes and encourage you to continue to share your suggestions with us. We are particularly interested in ways to continue simplifying the paper and online FAFSA by eliminating unnecessary data collection.

We encourage you to watch the IFAP Web site in 2015, when we will post a Federal Register Notice requesting public comments on the 2016-2017 FAFSA.

Summary of Changes to FAA Access to CPS Online

Enrollment Requirements

FAA Access to CPS Online

To ensure your school can take full advantage of 2015-2016 enhancements at the beginning of the processing cycle, the Primary Destination Point Administrator (DPA) of the TG Number used to send and receive FAFSA and ISIR correction data should verify your FAA Access enrollment status.

If your school enrolled for 2014-2015, your enrollment carries over to 2015-2016.

Annually, your school's Primary DPA is required to actively confirm the FAA Access to CPS Online services and users associated with your school's TG Number. If you do not perform this confirmation when requested by Federal Student Aid, your staff's rights for FAA Access could be revoked, resulting in a "Primary DPA Validation Needed" error message when staff members attempt to access the site. We encourage you to monitor the IFAP Web site regularly for electronic announcements regarding active confirmation requirements.

If your school is not enrolled for CPS Online services, your school's Primary DPA can complete the enrollment for FAA Access to CPS Online services for your school, including access to Return to Title IV (R2T4) on the Web and the ISIR Analysis Tool, through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at fsawebenroll.ed.gov.

The Primary DPA must print a Federal Student Aid User of Electronic Services Statement to be signed by new users of FAA Access, R2T4 on the Web, or the ISIR Analysis Tool. While you are not required to mail Federal Student Aid User of Electronic Services Statements to FSA's Participation Management system, you must retain signed copies at your school.

To access FAA Access (faaaccess.ed.gov), you must use an FSA User ID and password. Any FAA Access user at your school who does not have an FSA User ID can acquire one by completing the following steps:

Step 1: Go to the [SAIG Enrollment site](#) and click the “FSA User ID Registration” link on the left-hand side of the home page.

Step 2: Enter the identifying information requested and click “Submit.”

Step 3: Follow the remaining steps, which include establishing a password and setting up challenge questions.

During the FSA User ID registration process, the user must verify the e-mail address on the SAIG Enrollment Web site. We will use this e-mail address to send the FSA User ID.

Note: As first explained in a [January 13, 2012 Electronic Announcement](#) on the IFAP Web site, we implemented a technology security initiative in 2012 called Two-Factor Authentication (TFA). Through TFA, when logging in to certain Federal Student Aid systems, including the FAA Access to CPS Online Web site, an authorized user is required to use a traditional user ID and password, as well as provide a one-time password (OTP). A registered token device in the physical possession of the user generates the OTP. We have completed our phased distribution of tokens and token registration/usage information to schools and most school users have successfully begun using TFA tokens to access FAA Access to CPS Online. If you have questions about TFA, send an e-mail to TFA_Communications@ed.gov.

R2T4 on the Web

R2T4 on the Web is a non-year-specific application developed to calculate the earned and unearned portion of Title IV program assistance in accordance with section 484B of the Higher Education Act. At this time, we anticipate no changes to R2T4 on the Web for the 2015-2016 cycle.

R2T4 on the Web is accessible through the FAA Main Menu of FAA Access and from the View menu in EDExpress.

Your staff members must enroll for FAA Access and Return of Title IV Funds to access R2T4 on the Web. The Primary or Secondary DPA of the TG Number currently used by your school to send and receive FAFSAs and ISIR corrections automatically has access to FAA Access and can add or modify rights. The Primary or Secondary DPA needs to enroll financial aid staff members for access to FAA Access and R2T4 on the Web.

Note: R2T4 on the Web cannot be used for a student who has received an Iraq and Afghanistan Service Grant. For these students, we provide paper Return of Title IV Aid Worksheets that are available from the IFAP Web site (<http://ifap.ed.gov/ifap/titleiv.jsp>).

ISIR Analysis Tool

The ISIR Analysis Tool Web application is designed for FAAs at any school who want to review and analyze the school’s ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (federally selected or defined by the school).

The ISIR Analysis Tool is accessible through the FAA Main Menu of FAA Access and from the View menu in EDEExpress. You must have Microsoft Internet Explorer, Version 8 (32-bit) or higher, to use the reporting features available in the ISIR Analysis Tool. You can also access the ISIR Analysis Tool site using Mozilla Firefox, Version 25 or higher.

Your staff members must enroll for FAA Access and the ISIR Analysis Tool to access the ISIR Analysis Tool. The Primary or Secondary DPA of the TG Number currently used by your school to send and receive FAFSAs and ISIR corrections automatically has access to FAA Access and can add or modify rights. The Primary or Secondary DPA needs to enroll financial aid staff members for access to FAA Access and the ISIR Analysis Tool.

Note: Using the ISIR Analysis Tool does not necessarily mean that your school is in the Quality Assurance (QA) Program or is exempt from federal verification requirements. To receive these benefits, you must have a signed QA Amendment to your Title IV Program Participation Agreement (PPA).

Note: ISIR Analysis Tool options will be added to the CPS Web Applications Demo System in April 2015. This demonstration system, which automatically preloads with test ISIRs, enables schools interested in using the ISIR Analysis Tool to examine features such as standard and ad hoc report generation in a mock-production environment.

EDEExpress 2015-2016 FAA Access Interface

To access FAA Access (including R2T4 on the Web and the ISIR Analysis Tool) through the EDEExpress 2015-2016 interface, you must follow the same enrollment procedures and use the same FSA User ID and password login credentials as you would to access the sites using your Web browser outside of EDEExpress 2015-2016.

You can save your TG Number, school code, and Application Save/Restore Password (used for initial applications only) in EDEExpress FAA Access setup (**Tools, Setup, Global, FAA Access**) or enter them each time you connect to FAA Access through the FAFSA and Student Inquiry tabs in EDEExpress. When you select these tabs, you are prompted for your FSA User ID and password, which are not stored in the EDEExpress database and must be entered separately from your TG Number and school code.

FAA Access Application Processing Changes

In the “Major Changes” section earlier in this guide, we describe many of the application processing changes that affect FAA Access Application Processing. In this section, we provide more detail about how you will experience these changes in FAA Access. These topics include:

- Improved guidance to Pacific Islander applicants
- Enhanced communication to foster youth
- Clarified definition of a parent
- Clarified definition of separated parents
- CPS NSLDS Match Changes

We discuss others changes for 2015-2016 in this section that apply only to FAA Access. These topics include:

- Reordered IRS Display Flags
- Identity Verification Results

Improved Guidance to Pacific Islander Applicants

In the “Major Changes” section of this document, we discuss the changes made to encourage returning Pacific Islander applicants (applicants who are citizens of the Marshall Islands, Federated States of Micronesia, and Palau) to reuse their initial pseudo SSN.

In FAA Access, we revised the “Citizens of the Marshall Islands, Federated States of Micronesia, and Palau” help topic to provide additional guidance. The revised help topic instructs FAAs to use the assigned pseudo SSN for all subsequent years when submitting a FAFSA.

It is important that FAAs instruct applicants who submit their FAFSAs using FAFSA on the Web to use their assigned SSNs to log back in to the FAFSA and for starting a new FAFSA in the future. Using the same pseudo SSN for each cycle enables the Common Origination and Disbursement (COD) System to calculate Pell Grant lifetime eligibility limit information more accurately.

See the [November 20, 2013 electronic announcement](#) regarding the use of pseudo SSNs for Pacific Islander FAFSA submission for more information about the importance of using an assigned pseudo SSN for each cycle.

Enhanced Communication to Foster Youth

In the “Major Changes” section of this document, we discuss legislative changes implemented to help us identify and notify applicants who are or were in the foster care system of their potential eligibility for federal student, including eligibility for assistance through federal programs for foster youth, such as the John H. Chafee Foster Care Independence Program and the Education

and Training Voucher (ETV) Program. In this section, we describe the changes made to FAA Access.

New application processing edits generate SAR comment codes 165 and 166. Comment codes and text are included on the SAR, SAR Acknowledgement, and eSAR (HTML and PDF) and in Student Inquiry. The comment codes are also included on the ISIR, on the FAA Information and Comments pages in FAA Access, and in ISIR Compare.

The comment text informs any applicant identified as a foster youth or someone who was in the foster care system that he or she may be eligible for assistance through federal programs for foster youth. It also provides a URL

(childwelfare.gov/pubs/reslist/rl_dsp.cfm?rs_id=38&rate_chno=W-00143) where the applicant can find contact information for his or her state ETV coordinator.

Non-FAFSA on the Web filers who respond **Yes** to the “At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?” dependency question, receive comment code 165.

In FAFSA on the Web, we added a new question, “Are you a foster youth or were you at any time in the foster care system?” The new question, described in more detail in the 2015-2016 FAFSA on the Web Changes and Enhancements section of this document, enables applicants to self-identify as a foster youth or a youth who was in the foster care system. These students receive comment code 166.

Clarified Definition of a Parent

We made important updates to the help topics to provide FAAs with additional guidance about whose information should be included in the Parent Finances pages. In FAA Access, we modified help topics that define a legal parent by adding the following example for “a person that the state has determined to be a legal parent”: for example, when a state allows another person’s name to be listed as a parent on a birth certificate.

In addition, we added widowed stepparents to the list of persons that would *not* be considered parents unless they have legally adopted the applicant.

Clarified Definition of Separated Parents

We made important updates to the help topics to provide FAAs with additional guidance to determine if parents are considered separated. For FAFSA purposes, a married couple is separated if the couple is considered legally separated by a state, or if the couple is legally married but has chosen to live separate lives, including living in separate households, as though they were not married. If you and your spouse are separated but living together, select “Married or Remarried,” not “Divorced or Separated.”

Note: When two married persons live as a married couple **but are separated by physical distance (or have separate households), they are considered married for FAFSA purposes.**

CPS NSLDS Match Changes

In the “Major Changes” section in this guide, we described legislative and program changes to the prescreening and postscreening match processes between the CPS and NSLDS. FAA Access reflects the following match process changes:

- We renamed the “Subsidized Loan Eligibility Used” field to “Subsidized Usage Period” on the FAA Information, Print Summary, eSAR (HTML and PDF), and ISIR Compare pages for the 2014-2015 and 2015-2016 cycles. We made this change to match NSLDS terminology.
- Reason codes displayed on the FAA Information, Print Summary, and ISIR Compare pages and in the “For Federal Student Aid Use Only” section of the eSAR (HTML and PDF) reflect the following changes:
 - We added two new postscreening reason codes. The values displayed in FAA Access for the new postscreening reason codes are:
 - 26 = Confirmed Loan Subsidy Status change
 - 27 = Decrease in Subsidized Usage Period
 - We revised the descriptions associated with three existing postscreening reason codes. The revised descriptions displayed in FAA Access for the 2015-2016 transactions are:
 - 11 = Exceeding Subsidized loan limit resolved
(formerly No longer exceeding subsidized loan status)
 - 12 = Exceeding Combined loan limit resolved
(formerly No longer exceeding combined loan limit)
 - 13 = Not in use
(formerly Change in type of Disability discharged loan)
- We added new undergraduate and graduate loan limit comment codes, which are displayed on the FAA Information and ISIR Compare pages and in the “For Federal Student Aid Use Only” section of the eSAR (HTML and PDF).
 - SAR comment code 392 is included on the student’s record if he or she is a graduate student who reaffirmed debt.
 - SAR comment code 393 identifies an undergraduate student who reaffirmed debt.
- We display new undergraduate and graduate loan limit comment text on the Comments page and on the eSAR (HTML and PDF).
- We display a new loan program code, **P1**, on the NSLDS page and on the eSAR (HTML and PDF) to identify Direct Perkins Loans, a loan program we may implement in the future.

Reordered IRS Display Flags

We reviewed the order by which the IRS Display Flags are set when the applicant is ineligible to use the Internal Revenue Service Data Retrieval Tool (IRS DRT) for more than one reason and made changes to the order of priority.

The value of the Student ISIR Display Flag is now set in the following priority, from first priority to last priority:

- A = Dependent student skipped the income and asset questions – IRS DRT was not displayed
- E = First three digits of SSN are 666 – IRS DRT was not displayed
- D = Marital status date greater than or equal to January 2015 – IRS DRT was not displayed
- C = Tax return status not equal to “Already completed” – IRS DRT was not displayed
- H = Student amended his/her tax return – IRS DRT was not displayed
- J = Student filed a Puerto Rican or Foreign tax return – IRS DRT was not displayed
- K = Student is married and tax return filing status is Married Filed Separate Return – IRS DRT was not displayed
- L = Student is married and tax return filing status is Head of Household – IRS DRT was not displayed
- M = Conflict between the student’s marital status and tax return filing status – IRS DRT was not displayed
- B = IRS DRT was displayed to student

The value of the Parent IRS Display Flag is now set in the following priority, from first priority to last priority:

- A = Dependent student has special circumstances or Independent student skipped the parent questions – IRS DRT was not displayed
- N = Parents’ marital status is “Unmarried and both parents living together” – IRS DRT was not displayed
- E = First three digits of SSN are 666 – IRS DRT was not displayed
- F = Non-married parent or both married parents entered all zeroes in SSN – IRS DRT was not displayed
- G = Neither married parent entered a valid SSN – IRS DRT was not displayed
- D = Marital status date greater than or equal to January 2015 – IRS DRT was not displayed
- C = Tax return status not equal to “Already completed” – IRS DRT was not displayed
- H = Parent amended his/her tax return – IRS DRT was not displayed
- J = Parent filed a Puerto Rican or Foreign tax return – IRS DRT was not displayed
- K = Parents are married and tax return filing status is Married Filed Separate Return – IRS DRT was not displayed
- L = Parents are married and tax return filing status is Head of Household – IRS DRT was not displayed

- M = Conflict between the parents' marital status and tax return filing status – IRS DRT was not displayed
- B = IRS DRT was displayed to parent

Identity Verification Results

We added the 2015-2016 processing cycle to the Identity Verification Results feature in FAA Access. The Identify Verification Results feature in FAA Access is the tool that FAAs use to submit the required verification results for students flagged for possible identity fraud (Verification Tracking Groups V4 and V5).

See the [November 13, 2013 electronic announcement](#), Reporting Verification Results Using FAA Access to CPS Online for more information about reporting verification results.

See the [April 4, 2014 electronic announcement](#), Overview of April 2014 Flat File Enhancement to Identity Verification Results Functionality on FAA Access to CPS Online Web Site for more information about submitting verification results for multiple students by uploading a flat file.

Summary of Changes to the 2015-2016 CPS

Overview

This section describes changes to the following components of the CPS:

- Database Matches
- CPS Edits
- Need Analysis
- Application Output Sent to Students
- SAR Comments
- Mailing Addresses

Information about changes to the ISIR Record Layout is found in the [2015-2016 Electronic Data Exchange \(EDE\) Technical Reference](#), which is available on the IFAP and FSAdownload Web sites.

Database Matches

National Student Loan Data System (NSLDS)

For 2015-2016, we removed the ACG and National SMART Grant information from the ISIR and associated systems, including the CPS NSLDS match. We also made changes to the prescreening and postscreening matches. See the “Major Changes” section in this guide for more information about these match changes.

CPS NSLDS Match Prescreening Changes

- **Two New Fields** – We added two new fields to the CPS NSLDS match. These new fields are part of each of the six loan records:
 - NSLDS Loan Confirmed Loan Subsidy Status
 - Subsidy Status Date
- **New “P1” Loan Program Code** – We added a new loan program code, **P1**, to identify Direct Perkins Loans, a loan program we may implement in the future.
- **New “R” value for Loan Limit Flag Fields** – A new loan limit flag value, **R**, describes loans that exceeded the loan limit and for which the debt was reaffirmed. This value is included in the four limit flag fields listed below:
 - NSLDS Undergraduate Subsidized Loan Limit Flag
 - NSLDS Undergraduate Combined Loan Limit Flag
 - NSLDS Graduate Subsidized Loan Limit Flag
 - NSLDS Graduate Combined Loan Limit Flag

CPS NSLDS Match Postscreening Changes

The postscreening changes include:

- **Added Two New Postscreening Reason Code Values** – We added two new postscreening reason codes, these codes are:
 - 26 = Confirmed loan subsidy status change
 - 27 = Decrease in subsidized usage period
- **Revised Three Postscreening Code Values** – We revised the descriptions associated with three existing postscreening reason codes; the revised descriptions for the 2015-2016 transactions are:
 - 11 = Exceeding subsidized loan limit resolved
(formerly No longer exceeding subsidized loan status)
 - 12 = Exceeding combined loan limit resolved
(formerly No longer exceeding combined loan limit)
 - 13 = For Federal Student Aid use only
(formerly Change in type of disability discharged loan)

CPS Edits

We incremented the year references in data element field titles and year parameters in our edits by one year and revised edits for requirement changes. We adjusted new field values and also added and modified several CPS edits for 2015-2016.

- **ACG and National SMART Grant Edits** – We removed the edits associated with the ACG and National SMART Grants. See the “Major Changes” section in this guide for more information about this change.
- **Foster Care/Orphan or Ward of the Court Edits** – We added edits for applicants who:
 - **File using the paper or PDF FAFSA** – We added an edit for applicants who answer **Yes** to question 53, “At any time since you turned age 13, were both of your parents deceased, were you in foster care or were you a dependent or ward of the court?” which sets comment 165 on the applicant’s record.
 - **File using FAFSA on the Web** – We added an edit for Web filers who answer **Yes** to the new Foster Youth question which sets SAR comment code 166 on the applicant’s record.
- **Loan Limit Flag Equal to “R” Edits** – We added edits for the new loan limit flag value of **R** that sets the following SAR comment codes:
 - **392** – We added edits that set comment code 392 on an applicant’s record when the Graduate Subsidized Loan Limit Flag or Graduate Combined Loan Limit Flag field value is set to **R**.
 - **393** – We added edits that set comment code 393 on an applicant’s record when the Undergraduate Subsidized Loan Limit Flag or Undergraduate Combined Loan Limit Flag field value is set to **R**.
- **SAR C Flag Edits** – We updated the edits that cause the SAR C Flag to be set on an applicant’s record. These edits were updated for the new and deleted SAR comments. An applicant with comment codes 392 or 393 also has the SAR C Flag set on his or her record.

Need Analysis

We updated the need analysis offsets and Income Protection Allowances (IPAs) based on legislative changes. The methodology for determining the EFC is found in Part F of Title IV of the Higher Education Act of 1965, as amended.

The income threshold for an automatic zero EFC remains unchanged at \$24,000 for the 2015-2016 Award Year.

See the [May 30, 2014 Federal Register Notice](#) posted on the IFAP Web site for changes to the 2015-2016 need analysis tables. You can also consult the [2015-2016 EFC Formula Guide](#), posted to the IFAP Web site on September 2, 2014, for more information.

Application Output Sent to Students

For each transaction processed at the CPS, an output document is sent to the applicant: a paper SAR, SAR Acknowledgement, or an E-mail Notification of SAR Processing with information to access SAR data on the Web.

- **SAR** – This document is designed to notify the student of application and eligibility status and provide a paper-based means for correcting or confirming application data. Applicants can also request a SAR by calling the Federal Student Aid Information Center at **800/4-FED-AID (800/433-3243)**.
- **SAR Acknowledgement** – This document is designed to notify the student of application and eligibility status; however, if corrections are needed, the applicant uses FAFSA on the Web or contacts the school to submit corrections through FAA Access or a mainframe system.
- **E-mail Notification of SAR Processing** – This e-mail notifies the student of application and eligibility status more quickly than the paper SAR or the SAR Acknowledgement. The applicant can view the SAR online and print the online SAR document as often as needed. The e-mail includes a link to the FAFSA on the Web Login page, where the applicant, after his or her identity is authenticated, can view and print the SAR.

For more information on how the CPS determines the type of output document sent to applicants, see Appendix D of the [2015-2016 ISIR Guide](#), which can be downloaded from the IFAP and FSAdownload Web sites.

SAR Changes

No significant changes were made to the SAR for 2015-2016.

SAR Acknowledgement Changes

No significant changes were made to the SAR Acknowledgement for 2015-2016.

Paper Output Changes

We made the following changes to the paper SAR and SAR Acknowledgement:

- **Color** – Paper 2015-2016 SARs and SAR Acknowledgements are printed on yellow paper to match the color scheme of the 2015-2016 paper FAFSA.
- **FAA Comment List** – Previously, a list of comments that applied only to the FAAs was used to print the comments on the SAR. We have removed this FAA-only comment list and now print the first 20 comments in a student's record on the SAR.

SAR Comments

SAR comments appear on SARs that we mail to applicants and on eSARs that applicants view on FAFSA on the Web. The comment codes are printed on the ISIR report from EDExpress.

Each year we make annual rollover changes, such as updating year references, item numbers, and deadline dates. We also revise agency names and update mailing addresses and phone numbers where necessary.

Some of the more significant changes to the comment text are described below.

- **Deleted Comments** – This year we deleted several comments, including the following.
 - **ACG and National SMART Grant comments** – We deleted comments 240 to 244, 246, and 261 to 266, which were for the ACG and National SMART Grant.
 - **Not-for-Profit agency contact information comments** – We deleted comments 320 and 323 to 325, which pertained to Not-for-Profit agencies.
- **SAR C Flag Changes** – Two new comments are associated with the SAR C Flag; these SAR comment numbers are 392 and 393.

Comment	Reason Comment Appears on the Record
165	Identifies an applicant who filed using a paper or PDF FAFSA and indicated that he or she was an orphan or ward of the court.
166	Identifies an applicant who filed using FAFSA on the Web and indicated he or she was in foster care.
392	Identifies a graduate student applicant who exceeded the loan limit and reaffirmed his or her debt and eligibility was restored. The SAR C Flag is set on this record.
393	Identifies an undergraduate student applicant who exceeded the loan limit and reaffirmed his or her debt and eligibility was restored. The SAR C Flag is set on this record.

For a full listing of the 2015-2016 SAR comment code text and a description of changes to comment text, see the [2015-2016 SAR Comment Codes and Text](#) guide, located on the IFAP and FSAdownload Web sites.

Mailing Addresses

FAFSA Processor

Document	Mailing Address
FAFSA (Including Pacific Islanders)	Federal Student Aid Programs P.O. Box 7001 Mt. Vernon, IL 62864-0071
PDF FAFSA	Federal Student Aid Programs P.O. Box 7002 Mt. Vernon, IL 62864-0072
Spanish FAFSA	Federal Student Aid Programs P.O. Box 7003 Mt. Vernon, IL 62864-0073
Spanish PDF FAFSA	Federal Student Aid Programs P.O. Box 7007 Mt. Vernon, IL 62864-0070
SAR	Federal Student Aid Programs P.O. Box 7004 Mt. Vernon, IL 62864-0074
Spanish SAR	Federal Student Aid Programs P.O. Box 7005 Mt. Vernon, IL 62864-0075

Signature Pages

Document	Mailing Address
FAFSA on the Web Signature Pages (including corrections)	Federal Student Aid Programs P.O. Box 7006 Mt. Vernon, IL 62864-0076

Getting Help

Customer Service

FSATECH Listserv

FSATECH is an e-mail listserv for technical questions about Federal Student Aid systems, software, and mainframe products.

For information on subscribing, go to ed.gov/offices/OSFAP/services/fsatechsubscribe.html.

CPS/SAIG Technical Support

800/330-5947 (TDD/TTY 800/511-5806) or 319/665-4762

Federal Student Aid maintains this call center to address questions about CPS processing, the FAA Access to CPS Online Web site, the CPS Web Applications Demonstration Web site, PC software such as EDEXpress and EDconnect, SAIG enrollment and data transmissions, and to collect system enhancement suggestions.

Representatives are available Monday through Friday, 8 A.M. to 8 P.M. Eastern Time (ET).

E-mail: CPSSAIG@ed.gov

Federal Student Aid Information Center (FSAIC)

800/4-FED-AID (800/433-3243); 319/337-5665; or TDD/TTY 800/730-8913

E-mail: FederalStudentAidCustomerService@ed.gov

The Federal Student Aid Information Center (FSAIC) serves the public with information about the federal student aid application process. FSAIC customer service representative support is provided in English and Spanish and includes a toll-free telephone number, Interactive Voice Response Unit (IVRU) self-service, e-mail, or Live Help. Customers include students, parents, and FAAs seeking general information about federal grant and loan programs and assistance with the FAFSA (paper and FAFSA on the Web versions, including Federal Student Aid PIN assistance) and student aid processing timeframes.

Types of FSAIC assistance also include: FAFSA application status checks, completion of FAFSA and FAFSA corrections, requests to change addresses and Federal School Codes on the FAFSA, duplicate SAR requests, identification of student loan holders (including contact information), and Federal Student Aid publication fulfillment.

Representatives are available to answer Live Help and phone inquiries Monday through Friday from 8 a.m. to 10 p.m. ET. During peak processing periods, representatives are available during extended hours, which may include certain Saturdays and Sundays. FSAIC is closed on federal holidays with a few exceptions. For specific hours of operation including weekend and holiday hours, visit the StudentAid.gov Web site at studentaid.ed.gov/contact.

Reach FSA

855/FSA-4-FSA (855/372-4322)

This phone number provides a simplified way for the financial aid community to access these ten Federal Student Aid (FSA) School Contact Centers:

- Campus-Based Call Center
- COD School Relations Center
- CPS/SAIG Technical Support
- eZ-Audit Help Desk
- Federal Student Aid Research and Customer Care Center (RCCC)
- Foreign Schools Participation Division
- G5 Hotline
- NSLDS Customer Support Center
- Nelnet Total and Permanent Disability Servicer
- School Eligibility Service Group

Note: You can continue to use the specific phone number for each contact center.

Federal Student Aid's Research and Customer Care Center (RCCC)

800/433-7327 (phone); 202/275-5532 (fax)

This call center provides information on and assistance with Title IV policy, regulations, application processing questions, and contacting other Federal Student Aid staff.

Representatives are available Monday through Friday, 9 A.M. to 5 P.M. (ET).

E-mail: fsa.customer.support@ed.gov

CPS Web Applications Demonstration System

Demonstration versions of the FAFSA on the Web and FAA Access to CPS Online Web sites are available through the CPS Web Applications Demonstration System, a training tool for students, parents, and your financial aid staff.

This demonstration system offers most of the features of the production Web sites for FAFSA on the Web and FAA Access (including the ISIR Analysis Tool and R2T4 on the Web) and is preloaded with test data for your use.

The demonstration system will be available for use at fafsademotest.ed.gov with 2015-2016 options on December 28, 2014. ISIR Analysis Tool options will be added to the demonstration system in April 2015, at the same time we release the 2015-2016 production version of the ISIR Analysis Tool.

Users can access the current and prior cycle's versions of our Web sites in the demonstration system. For the FAFSA on the Web feature, a tab for the previous award year is displayed on the "My FAFSA" page. Preloaded demonstration data will be available for both award years.

You can log in to the demo sites, when available, using the following user name and password:

- User Name: eddemo
- Password: fafsatest

Note: The user name and password fields are case-sensitive.

The FAA Login information is:

- Destination Code: TG999999
- Federal School Code: 001002, unless logging into ISIR Analysis Tool, in which case you should use your school's Federal School Code

Other Helpful Documents

We encourage you to review other documents on the [IFAP](#) and [FSAdownload](#) Web sites for more information about changes to the 2015-2016 application processing system:

- [2015-2016 Application Processing System Specifications for Software Developers](#), July 31, 2014: Provides CPS system edits that can assist you in designing or building your own software to communicate with Federal Student Aid. Available on the IFAP and FSAdownload Web sites. A final version will be posted in January 2015.
- [2015-2016 EFC Formula Guide](#), September 2, 2014: Provides worksheets and tables that can be used to calculate an estimated EFC for students. Available on the IFAP Web site.
- [2015-2016 CPS Test System User Guide](#), October 6, 2014: Describes Federal Student Aid's CPS Test System and the testing process and provides testing instructions for the mainframe test environment, as well as instructions for using the CPS Web Applications Demonstration (Web Demo) System. Available on the FSAdownload Web site.
- [2015-2016 Electronic Data Exchange \(EDE\) Technical Reference](#), October 8, 2014: Describes the 2015-2016 EDE process and provides programmer specifications and information that can assist you in designing or building your own software to complement or take the place of the EDEExpress software to exchange data electronically with Federal Student Aid. Available on the IFAP and FSAdownload Web sites.
- [2015-2016 ISIR Guide](#), October 7, 2014: Provides in-depth information regarding the 2015-2016 ISIR. Available on the IFAP and FSAdownload Web sites.
- [2015-2016 SAR Comment Codes and Text](#), October 28, 2014: Describes changes to the SAR comment codes and associated text for 2015-2016 and database match information. Available on the IFAP and FSAdownload Web sites.
- [2015-2016 FAFSA on the Web Data Transfer Technical Reference](#), Fall 2014: Describes the process of transferring electronic FAFSA information from an organization to FAFSA on the Web. Also includes information about how organizations enroll for the service, the technical aspects of transferring data, options for testing the transfer process, and the FAFSA on the Web user experience when using transferred data.
- [2015-2016 FAFSA MyStudentData Download](#) guide, September 18, 2014: Describes the FAFSA MyStudentData Download file structure, including record layout and valid values.
- [2015-2016 FAFSA on the Web Preview Presentation](#), December 2014: Microsoft PowerPoint presentation containing information and screen shots pertaining to the 2015-2016 *FAFSA on the Web* site.
- English and Spanish versions of the FAFSA and FAFSA instructions will be available in December 2014 for download from ifap.ed.gov/ifap/processing/fafsaAndSARMaterialsPR.jsp.
- English and Spanish versions of the [2015-2016 Student Aid Eligibility Worksheet](#), December 2014.

- English and Spanish versions of the FAFSA on the Web Worksheet will be available for download on December 28, 2014 from [FAFSA on the Web](#). To access the worksheet, use the Search feature at the top of the FAFSA on the Web pages and search for “FAFSA on the Web Worksheet.”

Federal Student Aid Web Sites

- CPS Web Applications Demonstration System: fafsademotest.ed.gov
The user name is “eddemo” and the password is “fafsatest.”
- FAA Access to CPS Online (including R2T4 on the Web and the ISIR Analysis Tool): faaaccess.ed.gov
- FAFSA on the Web: fafsa.gov
- Federal Student Aid Conferences Web site: fsaconferences.ed.gov
- Federal Student Aid PIN: pin.ed.gov
- Federal Student Aid Publication Ordering: FSAPubs.gov
- FSAdownload Web site: fsadownload.ed.gov
- FSATECH e-mail listserv subscription information: ed.gov/offices/OSFAP/services/fsatechsubscribe.html
- Information for Financial Aid Professionals (IFAP) Web site: ifap.ed.gov
- National Student Loan Data System (NSLDS) Professional Access Web site: nslsdfap.ed.gov
- Quality Assurance Web site: ifap.ed.gov/qahome/Default.html
- Student Aid.gov: StudentAid.gov
- Student Aid Internet Gateway (SAIG) Enrollment: fsawebenroll.ed.gov
- Training information and registration Web site for upcoming Fundamentals of Federal Student Aid Administration training opportunities and learning resources: fsatraining.info