Better FAFSA for Mixed Status Families: Updates & What We Know
In the chat, please share:

- Name
- School/Org
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TODAY’S AGENDA

- Welcome, Introductions & Context
- Status of NEW FAFSA
- FSA ID without SSN
- Protection of Data within FAFSA
- Tips for Advising Students
- Q & A
- Closing
Today’s Presenters

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Today’s Presenters

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Purpose

Increase the ability of students who are citizens, whose parents are undocumented, to successfully apply for and receive all financial aid for which they are eligible.

Outcomes for Participants

✰ Provide a status update of the current situation
✰ Understand the new procedures for their parents to obtain an FSA ID
✰ Be clear about the options to successfully complete the FAFSA
✰ Gain strategies to avoid potential pitfalls & learn about available protection
✰ Build awareness and momentum towards resolving this process
Better FAFSA for Mixed-Status Families:
Top 10 Things to Know So You Can Prepare

The Free Application for Federal Student Aid (FAFSA) which unlocks the Pell Grant, work study, federal student loans and other forms of federal financial aid, is getting an overhaul this year as the US Department of Education (ED) implements the FAFSA Simplification and FUTURE Acts.

The FAFSA opened on December 31, 2023, three months later than the traditional launch date of October 1, which leaves students and families with a compressed window in which to fill it out.

Completing the FAFSA is important because it can put college within reach financially. As a result of the recent legislative changes, Pell Grant eligibility is expanding and the formula for determining eligibility is becoming more transparent. This means thousands of additional students will be eligible to receive up to $7,395 in federal grant money — money that does not have to be repaid — for college.

Most residents, including citizens, legal permanent residents, T visa holders, and other specified non-citizens, are eligible for federal financial aid, even if their parents are undocumented. Changes to the FAFSA may however pose some challenges for mixed status families. People without Social Security Numbers (SSNs) will need to go through a separate process to obtain an FSA ID prior to starting to form.

This document provides an updated overview of key changes and things students and families need to know to apply for federal financial aid.

Additional FSA ID requirements:
Under the new process, everyone who wants to enter information into an online FAFSA will need an FSA ID in order to access the form. This means students and parents who are required to provide financial information (see number two below) will need an FSA ID to fill out the form.
We recognize that:

- The current process of creating an FSA ID for parents without SSNs is not working.
- There currently is no ETA on when the FSA will get it up and running.
- We know that the concerns, heightened anxiety, and strain that mixed-status families are currently experiencing due to nearly a month of limbo in this process are real and valid.

Our intent for this webinar is to share the information that we have available on how the process should work once it is up and running.
Mixed-Status Family: a family where one or more members is undocumented.

81% of all children of undocumented immigrants are US-born.

1,000,000 students with undocumented parents age 17-21 are applying for FAFSA this year.

3,900,000 K-12 students live with a parent that is undocumented.
Getting Ready for the Better FAFSA Process
Major Changes for the Better FAFSA

- The 24-25 FAFSA opened on December 31, 2023
- FAFSA look and feel has changed
- Web & print version available in Spanish
- The FSA ID is required for everyone to start
- Students will need to invite other contributors to complete their section on the FAFSA
- Role-based completion is required
- Contributors have to consent to the IRS sharing their federal tax information with the FAFSA for the student to be eligible for federal aid
- ITINs requested on FAFSA but not for FSA ID
Known FAFSA Issues

- FSA has released a list of issues they are working to resolve with the 24-25 FAFSA
- Each issue has a status, description and a workaround if one is available
- To date only two know issues have been resolved -
  - No resolution for those without SSNs announced yet
- We recommend monitoring this site for issues being resolved and workarounds so you can support students and families who are encountering these issues
Who needs to create an FSA ID?

Students
• All students who are filing the FAFSA need an FSA ID

For married students:
• Student Spouse
  • Only if the student and their spouse do not file taxes together

For dependent students:
• For parents and/or stepparents who are required to be listed on the FAFSA
  • If they file taxes together only one parent/stepparent needs an FSA ID
  • If they do not file taxes together (including if they are non-filers) both parents/stepparents need FSA IDs
FSA ID Known Issues-Unofficial/Official

- Multiple reports of those without SSN not being able to set up an FSA ID
  - The system does not advance them through all the steps
- If Transunion has no information on the person, they are sent straight to the manual verification process
- It is our understanding that the address used in the FSA ID must be reported "exactly" the same when inviting a contributor in the FAFSA
- FSA Information Center has been giving out a wide variety of responses including they have no idea how to help you
- We are hopeful for some resolutions soon

Updates

- The Attestation Form should be available in Spanish by February 5th
- Updated email address for sending in Attestation Form is: IDVerification@ed.gov
FSA ID: Changes to the Process

FOR MANY STUDENTS AND PARENTS, THE FSA ID CREATION HAS STAYED THE SAME

Key Changes

- A verified email address is required
- Parents without SSNs will need to create FSA IDs
- SSNs provided for work purposes only can be used to create an FSA ID
- In two parent households, both parents will need FSA IDs if they do not file taxes as married-filing jointly
- FSA IDs will need to be authenticated with social security administration (takes approximately 3 days) to be fully functional during FAFSA completion
Create an Account

Personal Information

I understand that I’ll be required to certify that the information I provide to create an account is true and correct and that I’m the individual who I claim to be.

If I’m not the person I claim to be, I understand that I’m not authorized to proceed and that I should exit this form now. If I provide false or misleading information, I understand that I may be subject to a fine, prison time, or both.

First Name

Jesse

Middle Initial

C

Last Name

Faden

Date of Birth

Month: 09
Day: 07
Year: 1991

Social Security Number

I don’t have a Social Security number.
FSA ID: Parent(s) without SSNs*

Available now!

**How the process works:**

- Majority of FSA ID creation process is similar to those with SSNs
- Identity verification is used for:
  - Students who are from Freely Associated States
  - Parents without SSNs
- Users without SSNs they will have the option to answer knowledge-based verification questions
  - If successful – FSA ID is authenticated and available to use immediately
- A manual documentation process will be available for those who can’t pass “knowledge-based identity” questions

*Students from freely associated states will also need to go through this process to create FSA IDs
Id match & verification flow

START

User has SSN?

Yes

Social Security Admin. Match

NO

User updates information or contacts SSA to resolve

NO

Knowledge-based Verification

NO

ID Proofing

YES

User Identity Verified
Knowledge-based Verification Questions

- Questions asked at the end of the account creation process
- There is only one chance to answer the questions correctly
- Whether verification is successful will be revealed on next page
Identity match success?

- **Identity match successful – verified and ready to use**
  - **Your Account Was Successfully Created**
    - **What’s Next?**
      - Your Identity Has Been Verified
        - You can log in and start filling out the FAFSA® form.
      - **Remember to Save Your Backup Code**
        - Your backup code lets you access your account in the event that you cannot use any other two-step verification method.
        - **Your Backup Code is:**  
          - RJJ47DN2J6DF
      - **What You Can Do Now**
        - • Add information to a student’s FAFSA form as a parent or spouse.
        - • Complete the FAFSA form online as a student from a Free Application State (FAS).
        - • View your account dashboard, which includes checklists and other information.
      - **Return to Login**

- **Identity match unsuccessful additional steps needed**
  - **Your Account Was Created But You Need to Contact Us**
    - **What’s Next?**
      - Call to Confirm Your Identity
        - We couldn’t verify the information you provided. Call us at 1-860-433-3260 to confirm your identity.
      - **Remember to Save Your Backup Code**
        - Your backup code lets you access your account in the event that you cannot use any other two-step verification method.
        - **Your Backup Code is:**  
          - RJJ47DN2J6DF
      - **What You Can Do After We Verify Your Identity**
        - • Add information to a student's FAFSA form as a parent or spouse.
        - • Complete the FAFSA form online as a student from a Free Application State (FAS).
        - • View your account dashboard, which includes checklists and other information.
    - **Return to Login**
Manual Identity Verification Steps

- User will need to contact FSA 1-800-433-3243
- Identity verification case will be opened, and documents will need to be submitted
- Document verification will take 1-3 days and email confirmation will be provided
- Documents required (cannot be expired)
  - Complete Attestation Form
  - Proof of identity
    - 1 of the following: Drivers License, state/city ID, Foreign Passport, OR
    - Utility bill and 1 of the following: municipal, community, or consular ID
- Documents will need to be submitted to IDVerification@ed.gov
FAFSA Toolkit & Other Resources

• NCAN’s Better FAFSA Website: [https://www.ncan.org/page/better-FAFSA](https://www.ncan.org/page/better-FAFSA)
  • Contains a variety of toolkits to use for FAFSA training, state policy, partner communications and student/parent awareness

• NCAN FAFSA Learnings Webinar: [https://www.ncan.org/page/better-FAFSA-webinar-series](https://www.ncan.org/page/better-FAFSA-webinar-series)

• uAspire Resources: [https://www.uaspire.org/For-Students](https://www.uaspire.org/For-Students)
  • Student resources will continue to be updated to reflect the 24-25 FAFSA. Check back regularly for updates. Resources in multiple languages.

• Student Aid Account Set-up: [https://studentaid.gov/fsa-id/create-account/launch](https://studentaid.gov/fsa-id/create-account/launch)
FSA Resources

• FSA FAFSA Simplification Website: https://financialaidtoolkit.ed.gov/tk/announcement-detail.jsp?id=better-fafsa-better-future


• FSA Financial Aid Toolkit: https://financialaidtoolkit.ed.gov/tk/resources.jsp

• FSA Forms Library for attestation form and paper FAFSA: https://studentaid.gov/forms-library/
Data Protection within FAFSA
Who has access to the information submitted to FSA?

FSA will only share information provided through the FAFSA with (1) the schools students indicate they want to attend, and (2) government agencies responsible for ensuring that the information is accurate and determining if the student is eligible for aid.

How will my information be used?

Federal law prohibits the use of data collected through the FAFSA for anything other than calculating federal and state financial aid.

Note: the FAFSA does not ask questions about parents’ citizenship status.
(E) Privacy

The Secretary shall ensure that data collection under this paragraph complies with section 552a of title 5 and that any entity using the electronic version of the forms developed by the Secretary pursuant to this paragraph shall maintain reasonable and appropriate administrative, technical, and physical safeguards to ensure the integrity and confidentiality of the information, and to protect against security threats, or unauthorized uses or disclosures of the information provided on the electronic version of the forms.

Data collected by such electronic version of the forms shall be used only for the application, award, and administration of aid awarded under this subchapter, State aid, or aid awarded by eligible institutions or such entities as the Secretary may designate.

No data collected by such electronic version of the forms shall be used for making final aid awards under this subchapter until such data have been processed by the Secretary or a contractor or designee of the Secretary, except as may be permitted under this subchapter.
How does FSA protect my information?

FAFSA data is protected by encryption, “a mathematical formula to scramble your data into a format that is unreadable by anyone who might intercept it.”

How long does FSA keep information?

Schools are required to retain records relating to a student’s aid eligibility for three years. We do not have confirmed information on how long information used to verify parents’ identity via the TransUnion process will be kept.
TIPS for ADVISING STUDENTS
A high school senior approaches you at the beginning of the school year and shares that she’s stressed and scared because she doesn’t know how she’ll be able to pay for school. Initially she states that her parents don’t like filling out paperwork and they’re busy so they won’t be able to fill out the FAFSA. She asks if you know of any scholarships that she can apply for that don’t require her parent’s social security number because they don’t know their social security numbers. She doesn’t want you to reach out to her parents because they’re busy working and she’s worried that she won’t get to go to the school she’s always wanted to because it is expensive.

How would you approach this situation based on your role?
TIPS for ADVISING STUDENTS

Here are the points you should make sure to hit...

1. Empathize with student and reaffirm that you are here to support them.

2. Talk the student through what parental info is needed to fill out FAFSA.

3. Walk student through how the FAFSA process will work for both a parent with a SSN and a parent without an SSN.

4. Reassure the student that their parent’s info is safe and will only be used to calculate financial aid.
TIPS for ADVISING STUDENTS

Best Practices

Use visuals and inclusive terminology: “Undocumented” “Mixed-Status Families” Show alliance and support

Providing resources by DEFAULT to undocumented and mixed-status families Be proactive when preparing and sharing resources

Plan for the alternatives when providing opportunities to ensure these are open to ALL students
- Social Security Numbers -> ITIN
- Driver’s License -> Passport/ Bills
QUESTIONS
MOVING
FORWARD
TOGETHER
BUILDING COLLECTIVE
SOLUTIONS
EVERYONE has a part to play...
Contact Information

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