

Summary of Changes to the 2009-2010 FAFSA

2009-2010 FAFSA and FAFSA on the Web Worksheet Availability

Two Federal Student Aid forms assist applicants in providing their application data:

- **FAFSA** – Paper or electronic PDF form submitted by postal mail. The paper application can be ordered by students and parents from the Federal Student Aid Information Center (FSAIC). The PDF version of the paper FAFSA can be obtained online from various Federal Student Aid Web sites, such as FederalStudentAid.ed.gov, and printed for submission by postal mail.
- **FAFSA on the Web Worksheet** – Paper or electronic PDF worksheet that presents the FAFSA questions in the order in which they appear on FAFSA on the Web. The FAFSA on the Web Worksheet is the most effective tool applicants can use to facilitate the online application process. Applicants can complete the worksheet in preparation for their electronic application submission. This form is available for bulk orders or can be printed from the Web.

See below for more information about these forms.

FAFSA

Paper FAFSA Request

Due to the increased usage of FAFSA on the Web and the decreased usage of paper FAFSAs, we eliminated bulk distributions of the paper FAFSA in 2008–2009. However, the English and

Spanish versions of the paper FAFSA are still available. Beginning in late December 2008, students and families 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 1-800-4-FED-AID (1-800-433-3243).

PDF FAFSA Availability

The PDF FAFSA is an official FAFSA that can be completed on the computer and printed or printed and completed by hand. The PDF form is then submitted to Federal Student Aid for processing through postal mail or submitted to a school that will store the form and submit the student's application data using FAA Access to CPS Online or a third-party software program.

English and Spanish 508-compliant PDF versions of the 2009-2010 FAFSA will be available online for download in early December 2008 from various Federal Student Aid Web sites, such as FederalStudentAid.ed.gov. Schools can also access the PDF from our Web sites, including FSAPubs at FSAPubs.org, in December.

FAFSA on the Web Worksheet

The 2009-2010 FAFSA on the Web Worksheet is available for bulk order by schools. We recommend you continue to remind students and their parents that the worksheet is not a FAFSA and will not be processed as such if submitted by mail.

FAFSA on the Web Worksheet Paper Request

Orders for the 2009-2010 FAFSA on the Web Worksheet can be placed beginning in October 2008. At that time, postsecondary schools, high schools, libraries, and community agencies can submit orders for copies of the FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system located at FSAPubs.org. Distribution begins in late December 2008. Additional worksheets can be ordered from the FSAPubs Web site throughout the processing year.

Students and families can request single copies of the worksheet by contacting FSAIC at 1-800-4-FED-AID (1-800-433-3243).

FAFSA on the Web Worksheet PDF Availability

The FAFSA on the Web Worksheet will also be available in PDF format in early December 2008 on Student Aid on the Web (studentaid.ed.gov), IFAP (ifap.ed.gov), and FAFSA on the Web (fafsa.ed.gov).

2009-2010 FAFSA

Federal Student Aid extensively revised and reorganized the FAFSA form for 2009-2010 to incorporate new data elements mandated by the CCRAA and improve the form's overall flow. The layout of the application packet, which continues to be ten pages, has been revised. The application has increased from four pages to six, and some instructions are incorporated into the application pages to decrease the number of references to the instructions.

The following section describes the changes and enhancements to the paper 2009-2010 FAFSA. We will look first at global changes to the FAFSA, followed by changes to the cover page, the application pages, and the instructions.

Changes to the Paper 2009-2010 FAFSA

Global Changes

- **Colors** – The 2009-2010 FAFSA colors are green for student information and purple for parent information. The green is PANTONE 390 CVU and the purple is PANTONE 263 CVU.

The student color of the FAFSA continues with the four-year color rotation of yellow → orange → green → blue. Purple continues to be the color for parent information.

- **Year References** – All year references have been incremented by one year.
- **State Aid Deadlines** – We updated all state deadlines for 2009–2010.
- **IRS Tax Line Numbers** – We updated tax line references where applicable.
- **Changed Ovals to Circles** – As a part of the redesign process, we changed the ovals to circles.
- **Changed Box Size** – As a part of the redesign process and due to space limitations, we had to slightly decrease the size of the answer boxes.
- **Date Fields** – We added space between the month, day, and year boxes.
- **Income and Asset Fields** – We removed the comma that separated the thousands place in the income and assets fields.
- **Added Nine New Questions** – Questions 32, 56-60, 71, 85, and 103 were added to the FAFSA. Additional details on the new questions are provided later in this section.

- **Data Elements from Worksheets Embedded in the Form**– See the “Major Changes” section earlier in this guide for an overview of the elimination of the worksheets. Specific changes are listed below:
 - We deleted Worksheet A. The information previously found on Worksheet A is no longer collected.
 - We deleted Worksheets B and C and moved the individual data elements to the body of the FAFSA itself, grouped logically as Untaxed Income and Additional Financial Information, respectively.
 - We moved the Additional Financial Information (formerly Worksheet C) data elements before the Untaxed Income (formerly Worksheet B) data elements.
 - We collect values for each data element. The CPS then calculates the total for the data elements, includes the total in the ISIR file, and uses the total to calculate the EFC.
 - The student questions for Additional Financial Information are 46.a-46.e. and questions for Untaxed Income are 47.a-47.j.
 - The parent questions for Additional Financial Information are 94.a-94.e. and questions for Untaxed Income are 95.a-95.i.
- **Added Instructions for New Questions** – We added instructions for question 32, 45, 55, 56-57, 58-60, 85, and 103.
- **Moved Instructions from the Notes Pages to the Application** – As part of the redesign, we reunited instructions with the questions, and in some cases revised the question layout: 13, 16, 24-25, 39-40, Step Four, 63-70, 75, 76, 77-81, 89-90, 96, 97, and 98-102.
- **Revised Question Layout** – We revised the layout of questions on the application to include instruction text with the question answer or for spacing issues: 21-22, 26, 28-31, 33-34, 44-45, and 82-84.
- **Reordered Questions** – We reordered 2008–2009 questions 23-31 and the dependency status questions for better flow and ease of use.

Changes to the Cover Page (Page 1, not numbered)

- **State Aid Deadlines** – All state deadlines have been updated for 2009–2010. We removed the “www.fafsa.ed.gov” Web address that printed below the State Aid Deadlines heading. The same Web site address is given at the top of the form.
- **Mailing Your FAFSA** – We removed the “Do not send the worksheets on page 5: keep them for your records” sentence, since we no longer have a worksheet page.

Changes to the Application (Pages 3-8)

The application has increased from four pages to six pages.

Page 3

- **Question 13** – We revised the student’s “e-mail address” question to include the instructions previously contained on the Notes page.
- **Questions 16 and 17** – We revised the student’s “marital status” and “marital date” questions to include instructions that pertain to both questions and were previously contained on the Notes page.
- **Question 21** – For ease of use, we revised the format of the “Are you male or female” question, removed the “(Most male students must register with Selective Service to get federal aid)” text, and added text under the answer selection circles that reads “**(If female, skip to question 23).**”
- **Question 22** – For ease of use, we revised the “Selective Service registration” question. The question now reads “Most male students must register with Selective Service to get federal aid. If you are male, age 18-25 and not registered, fill in the circle and we will register you.” We also changed the response from two choices (“Yes” or “No”) to one choice, “Register me.”
- **Question 26** – We revised the format of the “high school completion status” question to include the answer choices (instead of referencing the instructions for the code) and revised the question to read “When you begin college in the 2009-2010 school year, what will be your high school completion status?” The value of 4 was changed from “Other” to “None of the Above.”

Page 4

- **Questions 28-31** – We revised the format of the “grade level,” “degree or certificate,” “enrollment status at the start of 2009-2010,” and “aid interested in” questions to include the answer choices instead of referencing the instructions for the field values. We also reworded each question for clarity.
- **Added TEACH Grant Question 32** – We added a new question to the FAFSA specific to the TEACH Grant that reads “Are you planning to complete coursework necessary to become an elementary or secondary school teacher, either now or in the future? **See Notes page 2**” with Yes, No, and Don’t know responses. This question was available on FAFSA on the Web for 2008-2009; however, there was not sufficient space or time to add it to the 2008-2009 paper FAFSA.
- **Step Two** – We revised the order of the sentences in the instructions.

- **Questions 33 and 34** – We revised the format of the “have you completed a tax return” and “type of tax return” questions so they are displayed next to each other instead of above and below each other.
- **Instructions for Questions 36–47** – We added “Report whole dollar amounts with no cents” to the instructions.
- **Questions 39 and 40** – For ease of use, we revised the format of the student and spouse’s “earnings from work” questions, added instructions, and removed the labels “You” and “Your Spouse” that printed next to the answer boxes.
- **Questions 44 and 45** – We revised the veterans benefits questions because of new legislative changes. The questions and responses are new.

- **Question 44** – The question now reads “Will you receive veterans education benefits between July 1, 2009 and June 30, 2010?” The responses are “Yes” and “No.” If the applicant answers “No” he or she is advised to skip to question 46.

In 2008-2009, the question asked the number of months that the applicant received veterans benefits.

- **Question 45** - The question now reads “What type of veterans education benefits will you receive? **See Notes page 2 and enter the correct number in the box.**” There is a box for a one-byte answer. The responses are:

- 1 = Montgomery GI Bill - Active Duty (Chapter 30)
- 2 = Post-9/11 GI Bill (Chapter 33)
- 3 = Montgomery GI Bill - Selected Reserve (Chapter 1606)
- 4 = Reserve Educational Assistance Program (Chapter 1607)
- 5 = Vocational Rehabilitation and Employment (Chapter 31)
- 6 = Dependents’ Educational Assistance (Chapter 35)
- 7 = Any other type of veterans education benefits

In 2008-2009, the question asked the monthly amount of benefits.

Page 5

- **Question 46** – We added this question to collect the information from Worksheet C, now called “Student’s 2008 Additional Financial Information.” This question has five responses, 46.a-46.e.
 - 46.e is new (not previously collected on Worksheet C) and reads “Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. DO NOT enter untaxable combat pay reported on the W-2 in Box 12, Code Q.” This question was added due to the CCRAA.
- **Question 47** – We added this question to collect the information from Worksheet B, now called “Student’s 2008 Untaxed Income.” This question has ten responses, 47.a-47.j.
 - CCRAA changes mandate that we no longer consider foreign income exclusions and special fuel credits as untaxed income. Therefore, we removed them as separate line

items and revised the “other untaxed income” question (47.i) to specify these exclusions and credits should not be included.

- **Step Three** – We revised the instructions to read “Answer all questions in this step to determine if you will need to provide parental information” and added five new questions, revised two questions, and reordered the questions in this section.
- **Question 53** – We added the text “between July 1, 2009, and June 30, 2010?” to the question to read “Do you have children who will receive more than half of their support from you between July 1, 2009, and June 30, 2010?”
- **Question 55** – We revised the “parents deceased or dependent/ward of the court” question to read “When you were age 13 or older, were both your parents deceased, were you in foster care or were you a dependent/ward of the court? **See Notes page 9.**” This change was necessary due to the expanded definition of an independent student to include students who were orphans, in foster care, or a ward of the court when age 13 or older, as mandated by the CCRAA.
- **Added Dependency Status Questions 56-60** – To accommodate the new independent student categories mandated by the CCRAA, we added five new dependency status questions with values of “Yes” or “No”:

FAFSA Question Number	Question Text
56	As of today, are you an emancipated minor as determined by a court in your state of legal residence? See Notes page 9.
57	As of today, are you in legal guardianship as determined by a court in your state of legal residence? See Notes page 9.
58	At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless? See Notes page 9.
59	At any time on or after July 1, 2008, did the director of an emergency shelter program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless? See Notes page 9.
60	At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? See Notes page 9.

Page 6

- **Reformatted Instructions at the End of Step Three** – We revised the instructions, increased the font size, and repositioned the text to make it more visible to the applicant.
- **Step Four** – We moved some of the instructions from the Notes page defining who is considered a parent to the Step Four instructions. Additional details are provided in the Notes on page 9.
- **Instructions for Questions 63-70** – We added the instructions “Enter two digits for each day and month (e.g., for May 31, enter 05 31).”
- **Added Parents’ E-mail Address Question 71** – We added a new question to the FAFSA to collect the parental e-mail address. This data has been collected on FAFSA on the Web since 2004-2005.
- **Question 75** – We added instructions from the Notes page to the “parents’ number in household” question.
- **Question 76** – We added instructions from the Notes page to the “parents’ number in college” question.
- **Questions 77-81** – The CCRAA extends the time that an individual who received benefits from a means-tested Federal benefit program can qualify for a simplified needs test (SNT) or automatic zero EFC calculation from 12 to 24 months. Because of this change we revised the instructions and reformatted the federal benefits program questions. We also moved these questions to follow the “parents’ number in college” question.
- **Questions 82 and 83** – We revised the format of “have your parents completed a tax return” and “type of tax return” questions so they display next to each other instead of above and below each other.
- **Question 84** – We revised the format of the “parents eligible to file a 1040A or 1040EZ” question.
- **Added Parent is a Dislocated Worker Question 85** – The CCRAA mandates that displaced workers are eligible for the SNT and automatic zero EFC calculations. As a result, we added a new question to determine if the applicant has a parent who is a dislocated worker. The question reads “As of today, are either of your parents a dislocated worker? **See Notes page 9**” with Yes, No, and Don’t know responses.

Page 7

- **Instructions for Questions 86-95** – We added “Report whole dollar amounts with no cents” to the instructions.

- **Questions 89 and 90** – For ease of use, we revised the format of the “parents’ earnings from work” questions, added instructions, and removed the labels “Father” and “Mother” that printed next to the answer boxes.
- **Question 94** – We added this question to collect the information from Worksheet C, now called “Parents’ 2008 Additional Financial Information.” This question has five responses, 94.a-94.e.
 - 94.e is new (not previously collected on Worksheet C), and reads “Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. DO NOT enter untaxable combat pay reported on the W-2 in Box 12, Code Q.” This question was added due to the CCRAA.
- **Question 95** – We added this question to collect the information from Worksheet B, now called “Parents’ 2008 Untaxed Income.” This question has nine responses, 95.a-95.i.
 - CCRAA changes mandate that we no longer consider foreign income exclusions and special fuel credits as untaxed income. Therefore, we removed them as separate line items and revised the “other untaxed income” question (95.i) to specify these exclusions and credits should not be included.

Page 8

- **Question 96** – We added instructions from the Notes page to the “student’s number in household” question.
- **Question 97** – We added instructions from the Notes page to the “student’s number in college” question.
- **Questions 98-102** – The CCRAA extends the time that an individual who received benefits from a means-tested Federal benefit program can qualify for a SNT or automatic zero EFC calculation from 12 to 24 months. Because of this change we revised the instructions and reformatted the federal benefits program questions.
- **Added Student or Spouse is a Dislocated Worker Question 103** – The CCRAA mandates that displaced workers are eligible for the SNT and automatic zero EFC calculations. As a result, we added a new question to determine if the applicant or his or her spouse is a dislocated worker. The question reads “As of today, are you (or your spouse) a dislocated worker? **See Notes page 9**” with Yes, No, and Don’t know responses.
- **Step Six** – We revised the second sentence of the instructions to read “You can find the school codes at www.fafsa.ed.gov or you can call 1-800-4-FED-AID.” We added the FSAIC phone number to the instructions as a resource for determining the six-digit federal school code.

- **104.b, 104.d, 104.f, and 104.h** – Based on feedback from the community, we revised the order of the housing plan options so they read “on campus,” “with parent,” and “off campus.”

Changes to the Instructions (Pages 2 and 9)

Moving many of the instructions to the application itself allowed us to decrease the Notes pages from four to two pages. Many of the following changes were made because of new questions or policy changes.

Page 2

- **Notes for question 30 (page 4)** – We moved the answer choices to the application question and reformatted the remaining instructions with bullets to draw attention to the different enrollment statuses.
- **TEACH Grant Instructions Added, Notes for question 32 (page 4)** – We added instructions for the new TEACH Grant question to describe the program, who is eligible, service obligations, consequences of not fulfilling the service conditions, and information on how to answer the question. A Web site (studentaid.ed.gov) is provided for more information.
- **Added Notes for question 42-43 (page 4) and 92-93 (page 7)** – The CCRAA changes the way 401[k] assets are reported. As a result, we reorganized the instruction text, added information on reporting 401[k] retirement plans, and clarified how education benefits and education savings plans should be reported. On the 2008-2009 FAFSA, a student who had to provide parental information for qualified educational benefits or education savings accounts was instructed not to include the value of an account he or she owned. The new instructions direct the student to report the value of the student-owned account as a parental investment in addition to any accounts owned by the parent for any member of the household.
- **Type of Veterans Education Benefits Instructions Added, Notes for question 45 (page 4)** – We added instructions for the revised “type of veterans benefits” question. We added seven codes to describe the type of benefits the applicant is receiving.

Page 9

- **Orphan, Foster Care, Ward of the Court Instructions Added, Notes for question 55 (page 5)** – We added instructions to help an applicant determine if he or she meets the conditions of being considered an orphan, in foster care, or a ward of the court. We also include instructions explaining that the applicant may need to provide proof to the FAA substantiating his or her situation.
- **Emancipated Minor or in Legal Guardianship Instructions Added, Notes for questions 56 and 57 (page 5)** – We added instructions to explain that the student can answer “Yes” to these questions if he or she can provide a copy of a decision from a court in his or her state of

legal residence stating he or she is an emancipated minor or in legal guardianship. We also added instructions explaining that the applicant may need to provide proof to the FAA substantiating his or her situation, such as a copy of the court's decision.

- **Unaccompanied Youth who is Homeless or At-risk of being Homeless Instructions Added, Notes for questions 58-60 (page 5)** – We added instructions that include definitions of “Homeless,” “Unaccompanied,” and “Youth” and instructions on how to answer these questions. We also added instructions explaining that the applicant may need to provide a copy of the determination of the status to the FAA substantiating his or her situation.
- **Notes for questions 61-95 (pages 6 and 7) Step Four** – We moved some of the instructions from this section to the Step Four heading and retained additional instructions on the Notes page. These instructions provide the applicant with additional information on who is considered a parent for the purposes of filling out the FAFSA.
- **Dislocated Worker Instructions Added, Notes for questions 85 (page 6) and 103 (page 8)** – We added instructions describing the conditions an individual must meet to be considered a dislocated worker. We also added instructions explaining that the applicant may need to provide proof to the FAA substantiating the situation.

Changes to the “What is the FAFSA?” Page (Page 10)

This is now page 10 instead of page 6 and has been reformatted to include the “What is the FAFSA?” and “Information on the Privacy Act and use of your Social Security Number” information.

- **Revised “What is the FAFSA?” Questions** – We revised the text in the following questions for clarity and conciseness.
 - **Why all the questions?**
 - **How do I find out what my Expected Family Contribution (EFC) is?**
 - **How much aid do I get?**
 - **How can I have more colleges receive my FAFSA Information?**
 - **Where can I get more information on student aid?**
- **Added “Information on the Privacy Act and use of your Social Security Number” Information** – We moved this information from the Notes pages and revised the question numbers that must be answered on the FAFSA to be considered for federal student aid.