

# FAFSA DATA

## and How We Use It

# FAFSA Basics

- **Free Application for Federal Student Aid**
- Pell grants, work-study, student loans, state aid, institutional aid
- Submitted to Feds for calculation of **Expected Family Contribution (EFC)**, *theoretical* measure of family/student ability to pay for college

# Demographic Questions

- Name, DOB, SSN, contact info, etc.
- Family size, number in college
- High school attended, completion status
- College grade level
- Parents' completed level of schooling (helps determine generational status)
- Questions to determine dependency type and eligibility for simplified needs

# Financial Questions

Parents, Students, and Spouse if married  
Income

- Annual earnings and AGI (if tax filer)
- Fed income tax status and amount paid

Assets

- Cash, savings, checking account balances
- Net worth of investments, businesses, big farms, not including family home

# More Financial Questions

## Untaxed income

- Tax-deferred retirement account payments
- Tax exempt interest income
- Child support received, etc.

## Additional financial information

- Education credits
- Child support paid
- and more

# Not *Quite* as Bad as it Looks

- Nearly all FAFSAs are filed electronically and skip logic is used for questions that do not apply.
- *Generally*, asset questions are skipped if income < \$50,000; and EFC is automatic Zero if income < \$26,000.

# FAFSA data is used ... to Determine MAP Eligibility

- **Monetary Award Program (MAP)** eligibility calculations begin with EFC components, Parent Contribution and Student Contribution.
- "Simplified FAFSA" discussions make us *a little ... somewhat ... very ... nervous.*

# ...to Help Administer MAP

- MAP claims projections
- MAP suspense and release dates
- Modeling effects of MAP formula changes
- Identify applicant characteristic trends (dependency type, region, school type, new/continuing status, income level, first-generation status, etc.)



# ... in Dealing With Legislators

- MAP budget requests
- Legislative questions
- MAP recipients by legislative district
- Analyze proposed bills
  - new programs / MAP tweaks proposed each year
  - dislocated worker pilot program
  - merit aid programs AIM HIGH)

# ...for Data Reporting

- Annual Data Book tables
  - FAFSAs filed, eligible MAP applicants and recipients (# and \$), suspended awards
  - Mean income by MAP eligibility status, dependency status, and school
  - MAP recipient enrollment patterns
- IBHE budget tables, NASSGAP reports, TANF-match reports
- Regular and random requests from higher education entities and advocates such as Women Employed, Advance Illinois, etc.

# ...to Help With HS Senior FAFSA Filing Initiatives

- Since 2007, Chicago Public Schools sends high school senior lists, we match with FAFSA data to show who filed; they encourage those who had not. This became a model for a national program.
- ISAC began a similar, automated process for ALL high schools in 2016.
- Outreach uses Pell eligibility \$ to emphasize to school officials the importance of FAFSA filing and opportunities created for students through financial aid awareness.

# ...to Match with Other Data

- National Student Clearinghouse
- Illinois Longitudinal Data System (ILDS)

However:

- Individual records are NOT shared without legal approval and lengthy data sharing agreements. Feds are very specific about allowable uses.
- Aggregated data can generally be shared, based on available staff time.