ISIR VS. ISIR

2023–24 vs. 2024–25

Michelle Johnson
Training Officer
June 13, 2023
BETTER FAFSA® BETTER FUTURE SERIES

- 6/6: Better FAFSA® Better Future Overview and Timeline
- 6/8: Protecting Federal Tax Information (FTI) at Your Institution
- 6/13: ISIR vs. ISIR
- 6/15: Professional Judgment, Dependency Status, and Verification
- 6/20: Q&A Session 1
- 6/22: Student Aid Index Part 1
- 6/27: Student Aid Index Part 2
- 7/6: Pell Minimum, Maximum, and In Between
- 7/11: The FAA’s Role in FAFSA Simplification
- 7/13: Q&A Session 2
- Summer: FAFSA Demonstration
AGENDA

1. ISIR Description
2. 2023–24 ISIR Removals and Additions
3. 2024–25 ISIR Layout
4. 2024–25 Planned ISIR Changes
5. FAA Access
6. Resources
ISIR DESCRIPTION
WHAT IS AN ISIR?

Data Sources:
- FAFSA data
- Processing results
- NSLDS history

ISIR:
- Delivered to Schools via Electronic Data Exchange
- Used for Packaging

CPS/FPS (FAFSA Processing System)
2023–24 ISIR REMOVALS
2023–24 FAFSA® QUESTION & ISIR REMOVALS

FAFSA Question #21
ISIR: “Male or Female?”

FAFSA Question #22
ISIR: “Selective Service Registration”

FAFSA Question #23
ISIR: “Drug Conv Affecting Eligibility?”
2023–24 ISIR ADDITIONS
2023–24 ISIR ADDITIONS

- Incarcerated Student Flag
  - How was applicant identified?
  - NSLDS Section, page 2

- Three new TEACH Grant fields
2024–25 ISIR LAYOUT
2024–25 ISIR LAYOUT

- Upcoming draft of 2024–25 ISIR Guide
  - No sample layout
  - Same EDExpress view/printouts
2024–25 ISIR PLANNED CHANGES
FAFSA® PROCESSING SYSTEM (FPS)

- Replaces Central Processing System (CPS)
- Interfaces with Common Origination and Disbursement (COD) system for Federal Work Study wages
  - Wages display in FPS but cannot be corrected in FAFSA Partner Portal
  - Wages provided on ISIR
- Provides test ISIRs
DIFFERENT FAFSA® QUESTION ORDER

2023–24

29. For 2021, have you (the student) completed your IRS income tax return or another tax return listed in question 30?

I have already completed my return ⬜ 1

I will file but have not yet completed my return ⬜ 2

I’m not going to file. Skip to question 35. ⬜ 3

30. What income tax return did you file or will you file for 2021?

IRS Form 1040 ⬜ 1

A foreign tax return or IRS Form 1040-NR. See Notes page 9 ⬜ 2

A tax return with Puerto Rico, another U.S. territory, or Freely Associated State. See Notes page 9 ⬜ 4

31. For 2021, what is or will be your tax filing status according to your tax return?

Single ⬜ 1

Head of household ⬜ 4

Married—filed joint return ⬜ 2

Married—filed separate return ⬜ 3

Qualifying widow(er) ⬜ 5

Don’t know ⬜ 5

32. Did (or will you) file a Schedule 1 with your 2021 tax return? Answer “No” if you did not file a Schedule 1 or only filed a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, or Alaska Permanent Fund dividend. See Notes page 9.

Yes ⬜ 2

No ⬜ 1

Don’t know ⬜ 1

2024–25

19 Student Tax Filing Status

Did or will the student file a 2022 IRS Form 1040 or 1040-NR? ⬜ Yes ⬜ No

If the student filed or will file a tax return with Puerto Rico or another U.S. territory, select “Yes.” International organizations include, for example, the United Nations, World Bank, and International Monetary Fund.

If the answer is “No” and the student is not married, questions 20–22 can be skipped, however, if the student is also required to provide parent information on the form, question 22 must be answered.

20 Student 2022 Tax Return Information

Filing status

Single ⬜ Head of household ⬜ Married filing jointly ⬜ Married filing separately ⬜ Qualifying surviving spouse
STUDENT AID INDEX (SAI)

**2023–24 ISIR**

**FAA Info Section:**
- Primary and Secondary EFC
- Auto Zero EFC Flag
- SNT Flag
- EFC Change Flag
- Professional Judgment Flag (if EFC adjustment resulted from PJ by FAA)

**Office Information Section:**
- Primary and Secondary EFC Type

**2024–25 ISIR**

**FAA Information Section:**
- SAI (-1500-99999)
- Provisional SAI (-1500-99999)
- SAI Formula (A, B, C)
- Computation Type (01-13)
- Professional Judgment Flag (if SAI adjustment resulted from PJ by FAA)
- Intermediate Values (with #s)
- Max Pell Indicator (1, 2, or 3)
- Minimum Pell Indicator (1-5)
STUDENT UNUSUAL CIRCUMSTANCES

2023–24 ISIR

- Special Circumstances Flag = 1

2024–25 ISIR

- Unusual Circumstances (1 or 2)
OTHER CIRCUMSTANCES

2023–24 ISIR-FAFSA® QUESTIONS AND SPECIAL CIRCUMSTANCE FLAG OF Y

- Homeless Child or Youth?
- Determined by HUD Homeless?
- Is Student at Risk for Homelessness?

2024–25 ISIR-FAFSA® QUESTIONS

- Unaccompanied Homeless Youth, or is Unaccompanied, At Risk of Homelessness, and Self-Supporting? (1 or 2)
  - Unaccompanied and Homeless (General)? (1)
  - Unaccompanied and Homeless (HS)? (1)
  - Unaccompanied and Homeless (TRIO)? (1)
  - Unaccompanied and Homeless (FAA) (1)
STUDENT SPOUSE, PARENT, OTHER PARENT

2023–24 ISIR

N/A

2024–25 ISIR

- Full name
- ITIN
- Phone #
- Email address
- Mailing address
MARITAL STATUS

2023–24 ISIR

STUDENT
- Single
- Married/Remarried
- Separated
- Divorced or Widowed

PARENT
- Married/Remarried
- Never Married
- Divorced or Separated
- Widowed
- Unmarried, Living Together

2024–25 ISIR

STUDENT
1-Single (Never Married)
2-Married (Not Separated)
3-Remarried
4-Divorced
5-Separated
6-Widowed

PARENT
1-Single (Never married)
2-Unmarried, living together
3-Married (not separated)
4-Remarried
5-Divorced
6-Separated
7-Widowed
### FEDERAL TAX INFORMATION (FTI) - STUDENT

**2023–24 DATA WILL CONTINUE**

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<thead>
<tr>
<th>STEP TWO (Student &amp; Spouse) (Q99 - Q99)</th>
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<td>Student's Income Earned From Work</td>
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<td>Spouse's Income Earned From Work</td>
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<td>Net Worth of Investments</td>
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<td>Net Worth of Business/Farm</td>
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<td>Co-op Earnings</td>
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<td>Student and Spouse Untaxed Income</td>
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<td>IRA Deductions and Payments</td>
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<td>Child Support Received</td>
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<td>Other Untaxed Income</td>
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<td>Money Rec’d/Paid on Your Behalf</td>
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**2024–25 NEW DATA ADDED**

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<th>Returned tax year (CCYY)</th>
<th>Filing status code (1, 2, 3, 4, 5)</th>
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<td>Schedule C net profit/loss (#)</td>
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<td>Schedule B indicator (1 or 2)</td>
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<td>Schedule D indicator (1 or 2)</td>
<td>Schedule E indicator (1 or 2)</td>
<td>Schedule F indicator (1 or 2)</td>
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<td>Schedule H indicator (1 or 2)</td>
<td>IRS response code</td>
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FTI - PARENT

2023–24 ISIR: PARENT

Tax Return Filed?
Type of 20YY Tax Return Used
Parents Filed Schedule J?
Tax Return Filing Status
Is Parent a Dislocated Worker?

Adjusted Gross Income
U.S. Income Tax Paid
Parent 1 Income Earned From Work
Parent 2 Income Earned From Work

Cash, Savings, and Checking
Net Worth of Investments
Net Worth of Business/Farm
Asset Threshold Exceeded
Parents' Addl Financial Info
Education Credits
Child Support Paid
Taxable Earnings Need-Based Empty
Grant & Scholarship Aid Reported

STEP FOUR (Parents) Continued
Special Combat Pay/Combat Pay
Co-op Earnings
Parents' Untaxed Income
Tax-Deferred Pension/Savings
IRA Deductions and Payments
Child Support Received

2024–25 ISIR:
FTI fields for Student Parent
are the same as for the Student.
FTI - STUDENT SPOUSE, OTHER PARENT

2023–24 ISIR
N/A

2024–25 ISIR
- FTI fields for Student Spouse and Other Parent same as for Student
SPECIFIC FTI DATA ITEMS

- Tax year
- Tax filing status
- Adjust Gross Income (AGI)
- Number of exemptions and dependents
- Income earned from work
- Taxes paid
- Educational credits

- Untaxed IRS distributions
- IRA deductibles and payments
- Tax exempt interest
- Untaxed pension amounts
- Schedule C net profit/loss
- Indicators for schedules
- IRS response code
SAIG FTI MAILBOX

Partners enrolled to receive ISIRs must

- Enroll for an FTI SAIG mailbox,
- Sign an updated agreement, and
- Install upgraded software
FEDERAL WORK STUDY WAGES

2023–24 ISIR-FAFSA® QUESTION

“Taxable earnings from need-based employment programs, such as Work-Study...”

2024–25 ISIR-INTERFACE WITH COD

- Student Total FWS Earnings (#)
- Spouse Total FWS Earnings (#)
- Parent/Other Parent Total FWS Earnings (#)
STUDENT PERSONAL CIRCUMSTANCES

2023–24 ISIR

- Active Duty?
- Veteran?
- Have Children You Support?
- Dependents Other Than Children?
- Orphan or Ward of the Court?
- Emancipated Minor?
- In Legal Guardianship?

2024–25 ISIR

- Active Duty? (1)
- Veteran? (1)
- Children or Other Dependents? (1)
- Orphan? (1)
- Ward of Court? (1)
- In Foster Care? (1)
- Emancipated Minor? (1)
- In Legal Guardianship? (1)
STUDENT IDENTITY

2023–24 ISIR
- No ITIN
- Middle Initial
- No Suffix

2024–25 ISIR
- Individual Taxpayer Identification Number (ITIN) - if no SS#
- Middle Name (all contributors)
- Suffix (all contributors)
STUDENT COLLEGE AND CAREER PLANS

2023–24 ISIR

- What college degree or certificate will you be working on when you begin the 20xx-20yy school year? (Teaching credential was a possible answer)

2024–25 ISIR

- Pursuing Teacher Certification? (1 or 2)
# HIGH SCHOOL COMPLETION STATUS

## 2023–24 ISIR
- High School Name
- High School or Equivalent?
- High School City/St
- High School Code

## 2024–25 ISIR
- High School Completion Status (1, 2, 3, 4)
- High School Name (text)
- High School City (text)
- High School State (text)
- High School Equivalent Diploma Name (1, 2, 3, 4)
- High School Equivalent Diploma State (text)
FEDERAL BENEFITS RECEIVED

2023–24 ISIR

- WIC Benefits
- Medicaid or SSI
- SNAP Benefits
- Free/Reduced Price Lunch Benefits
- TANF Benefits

2024–25 ISIR

- Earned Income Tax Credit (EITC) (1)
- Received Federal Housing Assistance (1)
- Received Free/Reduced Price Lunch (1)
- Received Medicaid (1)
- Received Refundable Credit for 36B Health Plan (1)
- Received SNAP (1)
- Received Supplemental Security Income (1)
- Received TANF (1)
- Received WIC (1)
- None of the above (1)
PARENTS’ EDUCATION

2023–24 ISIR

- Highest School Completed by Parent 1
- Highest School Completed by Parent 2

2024–25 ISIR

- Did either of the student’s parents attend college? (1, 2, or 3)
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<td>2024–25 ISIR</td>
<td>Parent Killed in the Line of Duty (1 or 2)</td>
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COLLEGE SELECTION

2023–24 ISIR

- Up to 10 school choices and housing plans identified by Federal School Code

2024–25 ISIR

- Up to 20 school choices identified by Federal School Code
- No housing plans
## ISIR FLAGS

### 2023–24 ISIR

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<th>FAA Information</th>
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| Mon 2999999 Mon 8 9999999 Mon 2 9999999 Mon 8 9999999 | STX 9999999 APA 9999999 SATI 9999999 |
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### IRS Data Flags

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GENDER

2022–23 ISIR

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<td>Male or Female?</td>
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<td>STEP TWO (Student &amp; Spouse) (Q99 – Q99)</td>
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<td>Tax Return Filed?</td>
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<tr>
<td>Type of 20YY Tax Return Used</td>
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2024–25 FAFSA® QUESTIONS (NOT ON ISIR)

11. Student Demographic Information

The answers to these questions do not affect aid eligibility and will not be used in any aid calculations. They will be used for research purposes only.

What is the student’s gender?  
- Male  
- Female  
- Nonbinary or another gender  
- Prefer not to answer

*“Nonbinary” refers to a student who does not identify exclusively as male or female. “Nonbinary” does not refer to a transgender student who identifies exclusively as either male or female.*

Is the student transgender?  
- Yes  
- No  
- Prefer not to answer

*“Transgender” refers to a student whose gender identity is different from their sex assigned at birth.*
RACE/ETHNICITY

FROM DRAFT 2024–25 FAFSA® (WILL NOT APPEAR ON ISIR)

12 Student Race and Ethnicity

The answers to these questions do not affect aid eligibility and will not be used in any aid calculations. They will be used for research purposes only.

Is the student of Hispanic, Latino, or Spanish origin? Select all that apply.

☐ No, not of Hispanic, Latino, or Spanish origin
☐ Yes, Mexican, Mexican American, or Chicano
☐ Yes, Puerto Rican
☐ Yes, Cuban
☐ Yes, another Hispanic, Latino, or Spanish origin
☐ Prefer not to answer

What is the student’s race? Select all that apply.
FAA ACCESS
2024–25 CHANGES TO FAA ACCESS

- New name - FAFSA® Partner Portal (FPP)
- Student centric
- FTI not viewable
- Same correction functionality
RESOURCES
### Application source
1. Electronic Data Exchange
2. Online FAFSA
3. FAFSA Partner Portal
4. Paper
5. FPS
6. FSAIC

### Transaction type
A. Application
C. Correction

### Source of correction
A. Applicant
D. FPS
S. School

### Marital status student
1. Single never married
2. Married not separated
3. Remarried
4. Divorced
5. Separated
6. Widowed

### Marital status parent
1. Never married
2. Unmarried, living together
3. Married not separated
4. Remarried
5. Divorced
6. Separated
7. Widowed

### Tax return filing status
1. Single
2. Married, filed joint return
3. Married, filed separate return
4. Head of household
5. Qualifying surviving spouse

### Citizenship status
1. U.S. citizen
2. Eligible non-citizen
3. Neither citizen or eligible non-citizen

### HS equivalent diploma name
1. General Education Development (GED)
2. High School Equivalency Test (HiSET)
3. Test Assessing Secondary Completion (TASC)
4. Other

### Grade level in college
1. First year (freshman)
2. Second year (sophomore)
3. Other undergrad (junior or senior)
4. College grad, professional or beyond
# SELECTED ISIR DATA DEFINITIONS (2 OF 3)

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<th>Dependency Model</th>
<th>Unusual circumstance</th>
<th>High school completion status</th>
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<td>1-Yes</td>
<td>1 - High school diploma</td>
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<td>I-Independent</td>
<td>2-No</td>
<td>2 - State recognized high school equivalent (e.g., GED)</td>
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<td>Z-Provisional independent</td>
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<td>3 - Homeschooled</td>
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<td>X-Rejected dependent</td>
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<td>4 - None of the Above</td>
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<td>Y-Rejected independent</td>
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<tr>
<th>SAI change flag</th>
<th>Consent to receive and disclose FTI</th>
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<td>1-SAI increased</td>
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<tr>
<td>2-SAI decreased</td>
<td>2-Not granted</td>
</tr>
<tr>
<td></td>
<td>3-Revoked</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SAI formula</th>
<th>Student signed indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formula A</td>
<td>E-Student signed electronically</td>
</tr>
<tr>
<td>Formula B</td>
<td>P-Student signed on paper</td>
</tr>
<tr>
<td>Formula C</td>
<td>Bank-not signed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Max Pell indicator</th>
<th>IASG indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1, 2, or 3</td>
<td>1-Eligible for IASG</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Min Pell indicator</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 5</td>
<td>2-Grandfathered for IASG</td>
</tr>
<tr>
<td></td>
<td>3-Not eligible</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Student SSA citizenship flag results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A-US citizen</td>
</tr>
<tr>
<td></td>
<td>B-Legal alien eligible to work</td>
</tr>
<tr>
<td></td>
<td>C-Legal alien not eligible to work</td>
</tr>
<tr>
<td></td>
<td>D-Other</td>
</tr>
<tr>
<td></td>
<td>E-Alien, student restricted, work authorized</td>
</tr>
<tr>
<td></td>
<td>F-Conditionally legalized alien</td>
</tr>
<tr>
<td></td>
<td>N-Unable to confirm citizenship due to no match</td>
</tr>
<tr>
<td>*-Foreign</td>
<td></td>
</tr>
<tr>
<td>Verification tracking flag</td>
<td>Incarcerated applicant flag</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>V1-Standard Verification Group</td>
<td>1-Correctional facility address file</td>
</tr>
<tr>
<td>V2-For FSA use</td>
<td>2-Received via Incarcerated P.O. Box</td>
</tr>
<tr>
<td>V3-For FSA use</td>
<td>3-Incarcerated appl flag set in FAFSA Partner Portal (FPP)</td>
</tr>
<tr>
<td>V4-Custom verification group</td>
<td>4-Incarcerated appl flag removed in FPP</td>
</tr>
<tr>
<td>V5-Aggregate verification group</td>
<td></td>
</tr>
<tr>
<td>V6-For FSA use</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Professional judgment</th>
<th>Incarcerated applicant flag</th>
<th>DHS secondary match status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-SAI adjustment processed</td>
<td>1-Correctional facility address file</td>
<td>P-Pending</td>
</tr>
<tr>
<td>2-SAI adjustment request failed</td>
<td>2-Received via Incarcerated P.O. Box</td>
<td>Y-Confirmed eligible non-citizen</td>
</tr>
<tr>
<td>Blank-No SAI adjustment requested</td>
<td>3-Incarcerated appl flag set in FAFSA Partner Portal (FPP)</td>
<td>N-Not confirmed eligible non-citizen</td>
</tr>
<tr>
<td></td>
<td>4-Incarcerated appl flag removed in FPP</td>
<td>D-Duplicate case</td>
</tr>
</tbody>
</table>

**Children of Fallen Heroes**
1-Eligible for CFH
2-Grandfathered for CFH
3-Not eligible

**Dependency override indicator**
1-Dependent to independent override
2-Override canceled
3-Failed dependency override
Blank-No FAA override

**DHS primary match status**
P-Pending
Y-Confirmed eligible non-citizen
N-Not confirmed eligible non-citizen
D-Duplicate case
I-Invalid A-number
Blank-Not needed/not sent

**DHS secondary match status**
P-Pending
Y-Confirmed eligible non-citizen
N-Not confirmed eligible non-citizen
C-Continue to process
RESOURCES

- **DCL ID: GEN–23–17**: Implementing the 2024–25 FAFSA® Process
- **2024–25 Draft FAFSA Specifications Guide**
- **2024–25 FAFSA Roadmap**
- **2022 FSA Training Conference**
  - BO#9: FAFSA Simplification: Use of Federal Tax Information/FTI
  - BO#15: 2024–25 FAFSA Processing/FAA Access Changes
  - BO#16: 2024–25 FAFSA Form/Experience Change
- **2023–24 ISIR Guide**
- **2023–24 FAFSA**
KNOWLEDGE CENTER

FAFSA® Simplification Information

Get the most up-to-date information on implementation in the Knowledge Center “Topics” section.

Subscribe for email updates at Knowledge Center Home!
PROFESSIONAL JUDGMENT, DEPENDENCY, AND VERIFICATION

THURSDAY, JUNE 15, 2023

Join us as we discuss *FAFSA Simplification Act* changes related to professional judgments, dependency determinations, and verification.

For a complete list of upcoming webinars, visit the [FSA Training Center](#).
FEEDBACK SURVEY

https://www.surveymonkey.com/r/WWISIR

Survey open until June 13, 2024
HAVE MORE QUESTIONS?

You may submit questions not answered during today’s webinar on the FSA Training Center’s FAFSA Simplification Training and Resources page.

We will address as many submitted questions as possible during our dedicated Q&A webinars on June 20 and July 13.