

Federal Update



Federal Update

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U.S. Department of Education
KASFAA Spring Federal Update Webinar
Conference Evaluation Link: <https://cvent.me/zRrKZl>

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March 2020

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Statutory Updates

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Fiscal Year 2020 Appropriations

- **Fostering Undergraduate Talent by Unlocking Resources for Education (FUTURE) Act**
 - Reauthorizes mandatory funding programs for historically Black colleges and universities and other minority-serving institutions under Title III of the Higher Education Act of 1965 (HEA)
 - Provides secure disclosure of tax-return data from the Internal Revenue Service to the Department of Education to carry out student financial aid programs
 - Increases the level of mandatory appropriations for Pell Grants
- **Further Consolidated Appropriations Act, 2020**
 - Increases maximum Pell Grant for 2020-2021 by \$150

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Pell Payment Schedule

- **FY20 Pell Payment Schedule**
 - Estimated to be published in a Dear Colleague Letter in January 2020, no later than February 1, 2020

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Children of Fallen Heroes Scholarship Act

- Beginning in the 2020-21 award year:
 - FAA Access to CPS Online will be used to report eligibility to CPS
 - Flag will be carried on ISIR and comment set on SAR
 - COD will receive indicator to allow for proper awarding and disbursing of funds

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Deferment for Cancer Treatment

- On [August 22, 2019](#), the Department published an Electronic Announcement regarding approval of the new Cancer Treatment Deferment Request Form
- The EA includes information on the statutory requirements for the deferment as well as instructions for the form and corresponding process
- For the borrower to receive a deferment, a Doctor of Medicine or Osteopathy who is legally authorized to practice medicine must certify that the borrower is or was receiving cancer treatment in the physician's care, and the dates of that treatment

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Public Service Loan Forgiveness (PSLF)

- PSLF was created in 2007 and, among other requirements, specified that borrowers must make 120 qualifying payments on a Direct Loan under an income-driven repayment plan
- The Department is working to alleviate confusion and provide a better, more modern customer experience
 - PSLF Help Tool was developed in 2018 - [Studentaid.gov/PSLF](https://studentaid.gov/PSLF)
 - Additional enhancements are expected this year

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TEPSLF

- ED will reconsider borrower eligibility for Public Service Loan Forgiveness using an expanded list of qualifying repayment plans and some payments that don't count toward PSLF may count toward forgiveness under TEPSLF
- Additional qualifying repayment plans include:
 - Graduated Repayment Plan
 - Extended Repayment Plan
 - Consolidation Standard Repayment Plan
 - Consolidation Graduated Repayment Plan
- Refer to [May 23, 2018 Electronic Announcement](#)

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Foreign Gift Reporting

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What Is HEA Section 117?

- Institutions of higher education (IHE) must file a disclosure report if the IHE:
 1. Is owned or controlled by a foreign source,
 2. Receives a gift from a foreign source (> \$250,000), or
 3. Enters into a contract with a foreign source (> \$250,000).
- > \$250,000 means alone or in combination with all other gifts from or contracts with that foreign source within a calendar year

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When Are Section 117 Reports Due?

- Must file every 6 months
 - By January 31st for preceding July 1st – December 31st
 - By July 31st for preceding January 1st – June 30th

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How will the Reporting Process Change?

- Use the current system for the January 31, 2020 reporting
 - Electronic application or E-App at <https://eligcert.ed.gov/>
 - Enter information in Section K, Question 71; any restrictions or conditions pertaining to gifts or contracts can be entered in Question 69
 - Complete the signature page in Section L and submit report
- *For the next reporting cycle*, use the new system to submit the new information (as approved by OMB)
 - FSA will provide a link to the new system once it is live through an electronic announcement

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How Will It Change?

CURRENT REPORTING

- Through e-App Q#71
- 6 fields
- 162 IHEs filed reports in last 7 years

PROPOSED REPORTING

- Through online portal
- Multiple fields with separate entries for gifts and contracts
- Expect increase in IHE filing
- Expect increase in number of transaction reports by IHEs

Questions - FSAForeignGiftReporting@ed.gov

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Regulatory Updates

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Negotiated Rulemaking 2019

January-April of 2019, the Department conducted negotiated rulemaking on the following issues:

- Accreditation
- Distance Education and Innovation
- State Authorization of Distance Programs
- TEACH Grants
- Participation of Faith-Based Entities in Title IV

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Negotiated Rulemaking 2019

- The Negotiated Rulemaking Committee reached consensus on all issues!
- The issues will be published in three separate packages:
 - Accreditation/State Authorization
 - TEACH/Faith-Based Issues
 - Distance Education and Innovation

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Accreditation and State Authorization Distance Education Regulations

- Final rules for the Accreditation package were published on November 1, 2019
- The rules will become effective July 1, 2020 (with the exception of a few provisions that will be delayed to allow for a smooth transition)

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Accreditation and State Authorization Distance Education Regulations

The Regulations will:

- Define the roles and oversight responsibilities of each member of the triad
- End distinctions between accrediting agencies based on their geographic scope
- Create opportunities for new accrediting agencies that give priority to student needs and outcomes

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Accreditation and State Authorization Distance Education Regulations

- Enable new programs and curricular changes to be approved more quickly to ensure that education keeps pace with workplace needs
- Explicitly allow institutions to engage employers in program development and review
- Inform student choice by helping students determine which programs are mostly likely to prepare them to meet the licensure or certification requirements in certain occupations
- Ensure students studying at foreign institutions have the opportunity to complete part of their program in the U.S. or to take courses offered by other institutions in the country in which they are enrolled

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Accreditation and State Authorization Distance Education Regulations

Revise state authorization for distance education requirements:

- Recognize state authorization reciprocity agreements
- For institutions that are part of a reciprocity agreement, enable states to enforce additional requirements not related to authorization of distance education
- Refer to the student's location (rather than residence)
- Provide for early implementation of the state authorization provisions
 - To early implement, institutions must document the decision and provide documentation to the Department upon request

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Accreditation and State Authorization Distance Education Regulations

Department of Education Webinars (recordings will be posted to IFAP):

- January 22, 2-3 p.m. EST:
 - New recognition process, standards, recognition criteria, and implementation time frames
- January 23, 3-4 p.m. EST:
 - Substantive change, compliance, time frames, additional locations, alternate standards, and student outcomes
- January 30, 2-3 p.m. EST:
 - Teach outs, closures, state authorization, and additional locations

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TEACH Grants & Faith-Based Entities

- Notice of Proposed Rulemaking (NPRM) was published December 11, 2019
 - Comments were due by January 10, 2020

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TEACH Grants & Faith-Based Entities

To minimize the number of TEACH Grants that are converted to Federal Direct Unsubsidized Loans, the proposed regulations include:

- Simplify TEACH Grant program requirements
 - Loan conversion will occur only if recipient asks the Secretary to convert his/her TEACH Grants to loans, or if the recipient fails to begin or maintain qualifying teaching service within a timeframe that would allow the recipient to satisfy the service obligation
- Update, strengthen, and clarify other areas of the TEACH Grant program regulations

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TEACH Grants & Faith-Based Entities

Faith-Based Entities:

- The Department reviewed Title IV regulations in light of:
 - The Supreme Court's decision in *Trinity Lutheran Church of Columbia, Inc. v. Comer*
 - The U.S. Attorney General's Memorandum on Federal Law Protections for Religious Liberty relating to executive order 13798

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TEACH Grants & Faith-Based Entities

Faith-Based Entities proposed regulations include:

- Deleted outdated provisions that presume members of religious orders have no financial need
- Modified provisions relating Work-Study, Public Service Loan Forgiveness, and loan deferments for volunteer work to ensure that the provisions do not encroach on the Free Exercise clause of the Constitution

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Distance Learning and Educational Innovation

Forthcoming Proposed Rules:

- Distance Learning and Educational Innovation

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Distance Learning and Educational Innovation

The consensus language for the Distance Learning and Innovation packages address:

- The definition of “regular and substantive interaction,” as that term is used in the definitions of “correspondence course” and “distance education”
- The definition of the term “credit hour”

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Distance Learning and Educational Innovation

- The requirement that an institution demonstrates a reasonable relation between the length of a program and entry-level requirements for the recognized occupation for which the program prepares the student
- Removes barriers to innovation and student completion, graduation, or employment
- Direct assessment programs and competency-based education

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Borrower Defense to Repayment

- Notice of Proposed Rulemaking (NPRM) was published July 31, 2018
 - Department received nearly 32,000 comments in response
- Final Federal Register - September 23, 2019
 - Regulations will apply to all federal student loans made on or after July 1, 2020
 - Early implementation allowed for financial ratios under 668.172(d), and appendix A and B under subpart L (Financial Responsibility)

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Borrower Defense to Repayment

The Regulations will....

- Grant borrowers the right to assert borrower defense to repayment claims against institutions, regardless of whether the loan is in repayment, in default, or in collection proceedings
- Maintain the current rule's preponderance of the evidence standard for all borrower defense to repayment claims

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Borrower Defense to Repayment

- Allow borrowers to file defense to repayment claims for three years from either the student's date of graduation or withdrawal from the institution
- Create streamlined and fair procedures, regardless of the borrower's current repayment status, that ensure basic due process for all parties

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Borrower Defense to Repayment

- Give students the ability to allege a specific amount of financial harm and to obtain relief in an amount determined by the Department, which may be greater or lesser than their original claim amount
- Extend the closed school discharge window from 120 days to 180 days, ensuring that students have a meaningful opportunity to obtain relief if they cannot complete their programs due to school closures

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Borrower Defense to Repayment

- Reduce precipitous closures by encouraging institutions to close only after the completion of well-planned teach-outs that allow students a reasonable opportunity to finish their programs
- Allow students to choose between accepting an institution's offer of a teach-out opportunity or submitting a closed school discharge to the Department

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Borrower Defense to Repayment

- Provide fair, clear, and verifiable financial triggers for recalculating an institution's financial responsibility composite score and triggering additional security to protect taxpayers
- Update composite score calculations to reflect changes to Financial Accounting Standards Board (FASB) accounting standards

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Implementation of School Notice Requirements

- November 25, 2019 electronic announcement, ED alerted schools that we will soon begin to send notices required under the 2016 final borrower defense regulations
 - After we receive a borrower defense discharge application, we will send the school associated with the borrower's allegations a letter and a copy of the borrower's application and invite the school to respond and provide information relevant to the borrower's allegations within 30 days
- We will provide information on the implementation of any future changes to the school notice requirements under the 2019 borrower defense regulations before they become effective

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Gainful Employment

- A Negotiated Rulemaking Committee was formed in 2018 to consider the Gainful Employment rules
- Negotiations concluded without consensus being reached
- The Final Rule, that repealed the 2014 rule, was published on July 1, 2019

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Rescission of Gainful Employment

- Official implementation date of the GE rescission is July 1, 2020
- Schools have the option to early implement the rescission
 - An institution that early implements the rescission must document its early implementation internally and make such documentation available upon request by the Department
 - Documentation must be signed and dated
 - Institutions that do not early implement the rule are expected to comply with current GE rules until rescission becomes effective

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June 28, 2019 EA

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Rescission of Gainful Employment

- Institutions that early implement the rescission of the GE rule will not be required to:
 - Report GE data for the 2018-2019 award year to NSLDS, which will be due October 1, 2019
 - Comply with the current requirements in 34 CFR 668.412 (d) and (e) that require institutions to include the disclosure template, or a link thereto, in their GE program promotional materials and directly distribute the disclosure template to prospective students, which became effective July 1, 2019
 - Post the GE Disclosure Template
 - Comply with the certification requirements for GE programs under 34 CFR 668.414 (E-App requirements)

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2020-21 Application Processing

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Creating a Better User Experience

Flow of fafsa.gov synchronized to align with myFAFSA



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Protecting Applicant Privacy



- Social Security number (SSN) masked by default on Login view
- Users will have option to display SSN

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Tracking myFAFSA Submissions

- Internally tracking mobile app submissions beginning 10/01/19
- Starting in March 2020, will add the transaction source to the ISIR showing “Mobile App”



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myFAFSA Enhancements

- SAR available in myFAFSA
- SAR comments tailored to correspond with role in which user is logged in to the mobile app
- Two processing cycles available

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2018 Tax Form Changes

FAFSA form updated to reflect changes in the 2018 IRS tax forms

- Eliminated references to 1040A/EZ
- Added Schedule 1 question
- Removed exemptions questions
- Adjusted Foreign Tax return type answer response
- Combined untaxed pensions and untaxed portions of IRA distributions questions

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Elimination of 1040A/EZ

- Type of tax return filed questions (33 and 80) modified to remove eliminated forms
- Eligible to file 1040A or 1040EZ questions (35 and 82) replaced with Schedule 1 question



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Schedule 1 Question

The elimination of IRS Forms 1040A and 1040EZ required FSA to develop a reasonable proximation for automatic zero (AZ) and simplified needs test (SNT) EFC calculations

- Questions 35 and 82 repurposed to ask whether the applicant or parent did or will file a Schedule 1 with their 2018 tax return

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IRS Changes

- Exemptions field eliminated on tax forms, therefore exemptions questions (38 and 87 on 2019-20 FAFSA form) were removed
- Addition of IRS Form 1040-NR and 1040-NR-EZ to response options for type of tax return filed questions (33 and 80)

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Tax Changes - Combining Untaxed Portions of IRA Distributions & Pensions

2019-20

Student Questions for Tax Filers Only

Student Demographics School Selection Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

STUDENT INFORMATION

Did you have any of the following items in 2017? Enter amounts for all that apply.

Combat pay or special combat pay: Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 in Box 13, Code Q.

Student college grant and scholarship aid reported to the IRS in your income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form 1040-line 50

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040-total of lines 28-32

Tax exempt interest income from IRS Form 1040-line 8b

Untaxed portions of IRA distributions from IRS Form 1040-lines 15a minus 15b). Exclude rollovers. If negative, enter a zero here.

Untaxed portions of pensions from IRS Form 1040-lines 16a minus 16b). Exclude rollovers. If negative, enter a zero here.

PREVIOUS NEXT

2020-21

Student Questions for Tax Filers Only

Student Demographics School Selection Dependency Status Parent Demographics Parent Financials Student Financials Sign & Submit Confirmation

STUDENT INFORMATION

Did you have any of the following items in 2018? Enter amounts for all that apply.

Combat pay or special combat pay: This should be zero for enlisted persons and warrant officers (including commissioned warrant officers) because their combat pay is entirely non-taxable. Only enter taxable combat pay included in your (and, if married, your spouse's) adjusted gross income.

Student college grant and scholarship aid reported to the IRS in your income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

Education credits (American Opportunity Tax Credit or Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3-line 50

Untaxed portions of IRA distributions and pensions from IRS Form 1040-lines 4a minus 4b). Exclude rollovers. If negative, enter a zero here.

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans from IRS Form 1040 Schedule 1-total of lines 28-32

Tax exempt interest income from IRS Form 1040-line 2a

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Improvements

Notable changes resulting from FAFSA[®] form public comment period

- Income tax paid – added language to report zero if taxes paid is negative number
- Assets – added language to exclude ABLE (Achieving a Better Life Experience) accounts from assets
- Other untaxed income – adding language that untaxed foreign income not taxed by any government should be reported as untaxed income in questions 44h and/or 92h
- Questions 29 and 30 modified to provide more clarity

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DHS-SAVE 3rd Step Verification Update

- SAVE Instructions for U.S. Department of Education (School) Users Version 3.0 document is now available on IFAP:
<https://ifap.ed.gov/DHSSAVEEligibleNoncitizen/ElectThirdStepVerfi.html>

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DHS-SAVE 3rd Step Verification Update

- Version 3.0
 - Combines and updates all SAVE system process changes from last 2 electronic announcements
 - SAVE instructions 2.0 and
 - Resend record to matches functionality
 - How to resolve the “No Cases Found” error message
 - Changes to the “Additional Request” buttons (VAWA, Cuban/Haitian Entrant, and Fraud)
 - PDPA (Supervisor Third Step Only, STSO) User IDs are now enabled to view records and submit third step verification requests
 - DHS verification numbers will start with “00” followed by the last 2 digits of a year
 - How to advise students who need to correct, renew or replace their immigration documents

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DHS-SAVE Help and Support

- Email questions to applicationprocessingdivision@ed.gov, or
- Call APD voicemail at 202-377-4600 and leave message with:
 - Student’s DHS verification number
 - Your name
 - Your question
 - Your phone number

****Note:** Do not call the SAVE Call Center because they do not have a full understanding of our unique SAVE system access

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2020-2021 Verification

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Verification History

- Data-driven statistical analysis to select applicants for verification
- Machine learning model results in lower verification selection rates while also reducing improper payments
- The ISIR will display the selected applicants tracking group

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2020-2021 Verification

- May 24, 2019 Federal Register
 - Outlines federal verification items and documentation requirements
- Dear Colleague Letter - GEN-19-02
 - Supplemental verification information
- July 31, 2019 Electronic Announcement
 - Suggested text for 2020-2021 verification included in App. A
 - Schools only required to use exact language for the Statement of Educational Purpose

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2020-2021 Verification

- May 24, 2019 Federal Register
 - No verification tracking group changes
 - Includes option to use signed paper tax returns AND THEIR SCHEDULES to satisfy verification requirements under:
 - V1 or V5
 - Amended tax returns
 - IRS identity theft
 - Provides in footnotes the ability for a school to accept a signed statement that a nonfiler (or tax filer with an IRS approved extension) tried but was unable to obtain IRS verification of nonfiling (not required for dependent students)

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2020-2021 Verification

- Filing extension beyond automatic six-month extension for 2018 tax year:
 - A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2018
 - *No longer require copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," for tax year 2018 and beyond*
 - Verification of nonfiling from the IRS dated on or after October 1, 2019
 - A copy of IRS Form W-2 for each source of 2018 employment income received or an equivalent document; and
 - If self-employed, a signed statement certifying the amount of AGI and U.S. income tax paid for tax year 2018

Note: If an institution requires that, after the income tax return is filed, an individual granted an extension submit tax information, it must be used to reverify the income and tax information reported on the FAFSA.

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New IRS Tax Forms for 2018 Tax Year

- New Tax Form 1040 shortened/simplified (postcard size)
 - Old Tax Form 1040 line items moved to new Schedules 1 – 6

Form 1040 (2018) U.S. Individual Income Tax Return. This is the front page of the tax form, showing the taxpayer's name, filing status, and various deduction options. It includes sections for dependents, signatures, and preparer information.

Form 1040 (2018) Schedules 1-6. This is the back page of the tax form, containing the main calculation of taxable income and total tax. It includes sections for refundable credits, refund, and the final amount owed.

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New IRS Tax Forms for 2018 Tax Year

- Tax Forms 1040A/1040EZ Eliminated
- Tax Form Schedule 1 used as the proxy for same purpose that 1040A/1040EZ had for Auto-Zero and Simplified Needs Test eligibility

SCHEDULE 1 (Form 1040)		Additional Income and Adjustments to Income		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service Name(s) shown on Form 1040		▶ Attach to Form 1040. ▶ Go to www.irs.gov/Form1040 for instructions and the latest information.		2018 Attachment Sequence No. 01
				Your social security number
Additional Income	1-9b	Reserved		1-9b
10		Taxable refunds, credits, or offsets of state and local income taxes		10
11		Alimony received		11
12		Business income or (loss). Attach Schedule C or C-EZ		12
13		Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶		13
14		Other gains or (losses). Attach Form 4797		14
15a		Reserved		15a
16a		Reserved		16a
17		Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		17
18		Farm income or (loss). Attach Schedule F		18
19		Unemployment compensation		19
20a		Reserved		20a
21		Other income. List type and amount ▶		21
22		Combine the amounts in the far right column. If you don't have any adjustments to income, enter here and include on Form 1040, line 6. Otherwise, go to line 23		22
Adjustments to Income	23	Educator expenses		23
24		Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106		24
25		Health savings account deduction. Attach Form 8889		25
26		Moving expenses for members of the Armed Forces. Attach Form 3903		26
27		Deductible part of self-employment tax. Attach Schedule SE		27
28		Self-employed SEP, SIMPLE, and qualified plans		28
29		Self-employed health insurance deduction		29
30		Penalty on early withdrawal of savings		30
31a		Alimony paid	b Recipient's SSN ▶	31a
32		IRA deduction		32
33		Student loan interest deduction		33
34		Reserved		34
35		Reserved		35
36		Add lines 23 through 35		36

For Paperwork Reduction Act Notice, see your tax return instructions. Cat. No. 71479F Schedule 1 (Form 1040) 2018

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New IRS Tax Forms for 2018 Tax Year

- Tax Form Schedule 1 proxy exceptions would have allowed 1040 filers to still be eligible to file 1040A
- Institutions are not required to verify self-reported answer to Schedule 1 question

Notes for questions 35 (page 4) and 82 (page 6)

Answer "No" if you (and if married, your spouse) did not file a Schedule 1. Answer "No" if you (and if married, your spouse) did or will file a Schedule 1 to report **only one or more** of the following items:

1. Capital gain (line 13 – may not be a negative value)
2. Unemployment compensation (line 19)
3. Other income to report an Alaska Permanent Fund dividend (line 21 – may not be a negative value)
4. Educator expenses (line 23)
5. IRA deduction (line 32)
6. Student loan interest deduction (line 33)

Answer "Yes" if you (or if married, your spouse) filed or will file a Schedule 1 and reported additional income or adjustments to income on any lines **other than or in addition to** the six exceptions listed above.

If you do not know if you filed or will file a Schedule 1, select "Don't know."

Page 9

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Federal Update

New IRS Tax Forms for 2018 Tax Year

- New Tax Transcript template allows for both the old (2017 and prior) tax forms and the new (2018 and subsequent) tax forms
- Combines old tax lines and new tax lines into one transcript
 - Tax information/data should only appear on corresponding tax data line for applicable tax year

Income	
WAGES, SALARIES, TIPS, ETC:	\$30,544.00
TAXABLE INTEREST INCOME: SCH B:	\$0.00
TAX-EXEMPT INTEREST:	\$0.00
ORDINARY DIVIDEND INCOME: SCH B:	\$0.00
QUALIFIED DIVIDENDS:	\$0.00
REFUNDS OF STATE/LOCAL TAXES:	\$0.00
ALIMONY RECEIVED:	\$0.00
BUSINESS INCOME OR LOSS (Schedule C):	\$2,400.00
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:	\$2,400.00
CAPITAL GAIN OR LOSS: (Schedule D):	\$-3,000.00
CAPITAL GAIN OR LOSS: SCH D PER COMPUTER:	\$-3,000.00
OTHER GAINS OR LOSSES (Form 4797):	\$0.00
TOTAL IRA DISTRIBUTIONS:	\$0.00
TAXABLE IRA DISTRIBUTIONS:	\$0.00
IRAS, PENSIONS AND ANNUITIES:	\$0.00
TAXABLE IRAS, PENSIONS AND ANNUITIES:	\$838.00
SCHEDULE 2 INDICATOR:	0
SCHEDULE 3 INDICATOR:	0
ADDITIONAL INCOME:	\$0.00
ADDITIONAL INCOME PER COMPUTER:	\$0.00
REFUNDABLE CREDITS PER COMPUTER:	\$0.00

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2020-2021 Verification-IRS Tax Return Transcript Matrix

- The Department published an electronic announcement on November 26, 2019, which included an attachment of the *2020-2021 FAFSA Verification-IRS Tax Return Transcript Matrix*
- The matrix may help financial aid administrators map 2018 IRS Tax Return Transcript information to FAFSA/ISIR data

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Federal Update

Changes to IRS Tax Transcript

- Changes to faxing IRS tax transcripts
 - Effective June 28, 2019, the IRS will no longer fax tax transcripts to tax filers or third-parties
- Changes to third-party mailings
 - Effective July 1, 2019, option for requesting 3rd-party receipt of tax data on Form 4506, Form 4506-T and Form 4506T-EZ will no longer be available and transcripts only mailed to taxpayer
 - Schools can receive transcripts directly by participating in IRS' Income Verification Express Services [IVES] by registering for e-Services on IRS.gov

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6/12/19 EA

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Annual Student Loan Acknowledgement

(Formerly known as the Informed Borrower Tool (IBT))

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Federal Update

Annual Student Loan Acknowledgement

- Designed to assist borrowers in understanding the financial responsibility of funding their education
- Borrowers will see a user-friendly interface to view cumulative loan balance and repayment obligation
- Available on StudentAid.gov - initially as an informational tool

November 21, 2019 Electronic Announcement

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Annual Student Loan Acknowledgement Confirmation

- Starting in 2020-21, all Direct Loan (DL) borrowers (students and parents) will be required to confirm they have viewed the Annual Student Loan Acknowledgement before loans can be disbursed
- Schools must receive the confirmation for each borrower each award year before disbursing funds
- Annual Student Loan Acknowledgement Confirmation Process requirement will be implemented in **Spring 2020**

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Federal Update

R2T4 in COD

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R2T4 in COD

- R2T4 migrated to COD on April 7, 2019
 - <https://cod.ed.gov>
 - New sidebar - located under “Tools”
 - Core-functionality and calculations did not change
 - Base year for tool is 2017-18
 - Data is available for ten years from base-year
 - Calculations and previous information from FAA Access to CPS Online will not transfer to COD
 - *FAA Access R2T4 was decommissioned in December 2019*

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Federal Update

R2T4 in COD

- R2T4 enhanced functionality
 - Ability to “override” the completed days in calculation
 - Especially useful for certain modular or non-term credit-hour situations
 - Ability to copy/modify institutional and calendar profiles within an aid year
 - User can recalculate without creating a new record
 - Reports are consolidated into one file for export
 - Search by award year(s) and Payment Period or Period of Enrollment start/end date

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EAs – 12/20/18, 2/28/19, 3/1/19

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Operational Updates and Reminders

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Federal Update

Student Data and 2020 Census

1/14/20 – Student Privacy Policy Office (SPPO) Letter

- U.S. Census Bureau intends to verify and collect data about colleges'/universities' student housing through May 15, 2020
- The SPPO letter was developed to provide specific guidance to schools on the types of student information (“directory information”) that can be shared with the Census Bureau and when and how that private student information can be provided
- To review the SPPO letter please go to: studentprivacy.ed.gov
 - <https://studentprivacy.ed.gov/topic/letters-importance>

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Self-Certification Form

1/10/20 – Electronic Announcement

- Contains the new Private Education Loan Applicant Self-Certification form (Self-Certification form) under OMB Control Number 1845-0101
 - No changes from the earlier version of the form
- The expiration date of the new form is 8/31/2022 and replaces the previous version with an expiration date of 7/31/2019
 - The previous version of the Self-Certification form with the expiration date of 7/31/2019 may continue to be distributed until February 29, 2020

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Federal Update

Website Consolidation

12/13/19 – Electronic Announcement

- During the weekend of December 21-22, 2019, Federal Student Aid consolidated the current functionality of StudentAid.gov, StudentLoans.gov, FSAID.ed.gov, and some components of NSLDS® Student Access (NSLDS.ed.gov) under one umbrella website which will be *an enhanced version of StudentAid.gov*
- All of the functionality of StudentLoans.gov will be available under the new StudentAid.gov, and all existing pages will be redirected to the new pages
- FSAID.ed.gov and NSLDS Student Access will remain operational in the short term

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NSLDS Updates

11/25/19 Electronic Announcement

- Announces the availability of the [updated National Student Loan Data System \(NSLDS®\) Enrollment Reporting Guide](#)
 - Comprehensive document containing step-by-step instructions for reporting enrollment information to NSLDS and provides information on new functionality in NSLDS

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Federal Update

NSLDS Updates

NSLDS Newsletter #65 (October 2019)

- Automatic Closed School Discharge Code (CS02)
 - Indicates loan has been discharged due to school closing on or after November 1, 2013 and has been closed for at least three years (and borrower met all other criteria for discharge)
 - 11/25/19 EA discusses student eligibility and the closed school liability process
- New Cancer Treatment Deferment Type Code – “CD

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College Scorecard

11/20/19 – Electronic Announcement

- [College Scorecard](#) has published new data metrics including:
 - 1) earnings of students one-year after graduation by field of study and
 - 2) cumulative loan debt of borrowers by field of study
- In 2020, College Scorecard will continue to expand and address the remaining data metrics described in the March 2019 Executive Order on [Improving Free Inquiry, Transparency, and Accountability at Colleges and Universities](#)
- College Scorecard uses both NSLDS and Integrated Postsecondary Education Data System (IPEDS) data to present program-level information to prospective students and data users

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Federal Update

Revised Standard Term Policy

11/5/19 – Electronic Announcement

- Semesters and trimesters may now be between 14 and 21 weeks of instruction
- Quarters may now be between 9 and 13 weeks of instruction
- Standard terms are no longer required to be substantially equal
 - Two-week tolerance changed to maximum term length cap limit (exception for 12-week standard quarters)
 - Academic Year definition remains unchanged
- Contains a series of Q & As and term examples

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Single Audit Submission Requirements

11/5/19 – Electronic Announcement

- “Single Audit Submission Requirements for Fiscal Years Ending Within Calendar Year 2019 and Future Fiscal Years”
- Public and non-profit institutions participating in Title IV programs that submit a Single Audit that does not include the Student Financial Assistance Cluster as a major program are not required to notify their respective School Participation Division of any low-risk designation for fiscal years ending within calendar year 2019 and future fiscal years
- Institutions must still submit (via the eZ-Audit system) their complete Single Audit each year by the due date regardless of whether the Student Financial Assistance Cluster was audited as a major program

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Federal Update

Perkins Loans

• 9/16/19 – Electronic Announcement

- The Department provided guidance related to the assignment of Federal Perkins loans in default for two or more years

• 9/10/19 – Electronic Announcement

- The Department stated its authority to reimburse institutions for the institutional share of Perkins Loan Service Cancellations from the Perkins Fund

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Perkins Loans

9/10/19 – Electronic Announcement

- The Department will be sending institutions participating in the program a letter regarding the amount and deadlines by which the institutions must:
 - Return to the Department the Federal share, and
 - Remove and return to the institution the institutional share of their Perkins Loan Revolving Fund
- Must return to Department only the Federal share that has been requested

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Federal Update

2020-2021 College Financing Plan

9/5/19 Electronic Announcement

- Template name changed to College Financing Plan
- Added interest rate on each loan; more detail about need-based and merit-based scholarships and grants; can compare on-campus and off-campus living arrangements; and provide clear distinction between loans and grants and other aid that do not need to be repaid
- Simplified language and format, removing elements that add clutter or were unnecessarily complex
- 2020-2021 template to include additional data elements, a new responsive design, and the ability to customize colors to match those of your institution
 - <https://www2.ed.gov/policy/highered/guid/aid-offer/index.html>

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Proration of Payment Period Charges

3/5/19 – Electronic Announcement

- Department provided guidance and series of Q & As about when and how to prorate costs associated with books, supplies, and equipment when a school charges for these items upfront for periods greater than a payment period
- Guidance includes:
 - Explanation that a school is only required to prorate charges for books and supplies if students do not have a real and reasonable opportunity to purchase them elsewhere
 - Clarification that “real and reasonable opportunity” includes online purchasing options
 - Specific proration procedures
 - R2T4 considerations

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Federal Update

2020 CIP Codes

- The Classification of Instructional Programs (CIP) is a set of codes that define fields of study
- CIP Codes are maintained by the Department's National Center for Education Statistics (NCES). A “crosswalk” from 2010 to 2020 CIP Codes is available at: <https://nces.ed.gov/ipeds/cipcode/crosswalk.aspx?y=56>.
- We will be implementing the final updates to these CIP Codes in COD and NSLDS with updates in March 2020

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FSA Cybersecurity Compliance

- Federal Student Aid recognizes the importance of strong data security and has consolidated its cybersecurity compliance information and resources on IFAP
- The page contains instructions for reporting a breach, assessing compliance with the FTC’s Safeguards Rule, as well as information on privacy regulations, documents, and tools
- Please bring these resources to the people on your campus who are responsible for this

Information Pages

- [FAFSA and the IRS DRT](#)
- [Gainful Employment](#)
- [150% Direct Subsidized Loan Limit](#)
- [Campus-Based Programs](#)
- [Cash Management](#)
- [Default Prevention](#)
- [DHS-SAVE, Eligible Noncitizen](#)
- [Foreign Schools](#)
- [Loan Servicing and Collection](#)
- [HEAL Program](#)
- [MSURSD Catalog](#)
- [Reference Documents](#)
- [Cybersecurity Compliance](#)

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Federal Update

Data Accuracy/Integrity/Consistency

- Data provided to the Department serves important purposes. It is imperative that the data be accurate.
 - COD
 - Student's academic program information
 - NSLDS®
 - Enrollment, including academic program
 - Perkins loan reporting
 - FISAP
 - Annual and cumulative fields

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Federal Update

Resources – FAA Tool Kit

<https://fsatraining.ed.gov/course/view.php?id=277>

<ul style="list-style-type: none"> Information for Financial Aid Professional (IFAP) The Federal Student Aid (FSA) Handbook Application Processing Guides Operational Guides Technical References The Higher Education Act (HEA) Code of Federal Regulations (CFR) In a Nutshell: Negotiated Rulemaking Federal Registers Dear Colleague Letters (DCL) Electronic Announcements Program Integrity Q&As 	<ul style="list-style-type: none"> Other Published Guidance from ED FAA Access to CPS Online Common Origination and Disbursement (COD) System National Student Loan Data System (NSLDS) Other Web-based Systems and Software Web-based Resources Contact Information for ED and Other Federal Resources FSA Assessments Tools for Building Policies and Procedures Direct Loan Tools Preparing for Audits and Program Reviews
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Must be logged in to fsatraining.ed.gov use the FAA Tool Kit

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Federal Student Aid E- Training (FSA E-Training)

<https://fsatraining.ed.gov>

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Federal Update

2020 FSA Training Conference



December 1-4, 2020
FSA Training Conference
for Financial Aid Professionals
 Georgia World Congress Center
 Atlanta, GA

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Additional Contact Information

CODSupport@ed.gov; 800-848-0978

- Questions related to the Common Origination and Disbursement (COD) System, the Campus-Based programs, or Iraq and Afghanistan Service Grant, Pell Grant, TEACH Grant, and Direct Loan processing

nslds@ed.gov; 800-999-8219

- Questions related to NSLDS functions such as student eligibility, overpayments, loan history, and enrollment reporting

CPSSAIG@ed.gov; 800-330-5947

- Questions related to the Central Processing System (CPS), the Student Aid Internet Gateway (SAIG), FAA Access to CPS Online, and assistance with software products such as EDconnect and EExpress

edcaps.user@ed.gov; 888-336-8930

- Questions related to G5, the Department of Education's electronic system for grants management and payments

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Federal Update

Training Feedback

To ensure quality training, we ask all participants to please fill out an online session evaluation

- All registrants for this session will receive an email with a link to an electronic evaluation that we ask you to complete
- This feedback tool will provide a means to educate and inform areas for improvement and support an effective process for “listening” to our customers
- To register, please go to: <https://cvent.me/zRrKZl>

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Ask A Fed Online

FSA has implemented a resource to assist Financial Aid Administrators obtain guidance about the FSA programs. Based on the popularity and effectiveness of the Ask A Fed desk at the annual FSA Training Conference, we have instituted a similar process using email. Please send your inquiries about Title IV regulations to AskAFed@ed.gov.



The Ask A Fed email box is staffed every business day by a team of FSA Training Officers ready to assist schools with their questions.

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