

FA Solutions – FAFSA Simplification Training – Emily Haggerty

Training Purpose:

As a result of the FAFSA Simplification Act, major changes to the FAFSA were implemented on the 2023-24 application, and final changes to the application will be effective on the 2024-25 application. The application window for the 2024-25 FAFSA will start December 2023, which is 2 months after the normal start of the application window. Deadlines for submissions and financial aid decisions at most institutions will not change, which means the application, processing, and disbursement timeframe is shorter than in previous years. The goal of this training is to make sure that all employees are knowledgeable about the changes to the FAFSA and able to provide efficient service throughout the process. As a result of this training, FA Solutions will increase the number of submitted applications, ensure correctness and consistency of application processing, and maintain disbursement timelines.

Overall Training Plan Recommendation:

Due to the fast approach of December 2023, training will initially need to involve a combination of Virtual Instructor-Led Training (VILT), organization of short videos and help articles on SharePoint, and Job Aids for use by employees on-the-job. Every employee would receive introductory training on FAFSA Simplification. Subsequent training would be geared specifically for what the employee needs to know and be able to do in a particular job role. Each portion of this training would include an evaluative piece to inform further training.

Currently, as a 100% remote company, employees live in different locations and have different daily work roles. This structure may hinder coordinating schedules for VILT on a long-term basis. Using VILT as the main modality of training also requires schedules to align every time a new employee joins the company. To alleviate these limitations for the long-term future, using quality eLearning courses will allow trainees to complete training at different locations and different times. eLearning courses include clear objectives, scaffolded learning, engaging interactivity, and assessment. Videos, simulations, and scenario-based learning should be incorporated where appropriate. The company will need to invest in a learning management system to organize courses and track course learning outcomes. Alternative temporary solutions include increased use of SharePoint, increased utilization of Teams, or using video-editing software that allows for evaluation of trainees. The evaluation and data-collection piece of training is important to quantitatively monitor completion of training, growth towards business goals, and to isolate specific needs for improvements. VILT, SharePoint, and Job Aids may still be utilized as needed when new trends arise and require training.

Training pathways need to be defined and implemented according to employee role. Defining pathways ensures employees remain engaged in training that will be directly relevant and usable to them in performing their specific role.

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Specific FAFSA Simplification Trainings:

<i>Training Title/Topic</i>	Introductory FAFSA Simplification Training
<i>Target Audience</i>	All employees including Leadership, Day-to-Day Operators, Campus Directors, Financial Aid Processors, and Customer Service Representatives
<i>Training Time</i>	60 minutes
<i>Training Modality</i>	1 VILT session with corresponding Slide Deck and activities; slide deck will be designed to engage trainees through graphics, text, charts, and integrated questions/activities. 1 Job Aid outlining biggest changes and new acronyms
<i>Learning Objectives</i>	By the end of the session, the learner will be able to: <ul style="list-style-type: none"> • Describe the changes to the FAFSA across 4 major categories: eligibility, user experience, formulas, and awarding aid. • Contrast the Expected Family Contribution (EFC) to the Student Aid Index (SAI).
<i>Outline</i>	<p>Introduction</p> <ul style="list-style-type: none"> • Pre-Training Evaluation Game (Kahoot) • December 2023 – All schools must transition to using SAI in 2024-25 Academic Year; points concerning how this date affects the whole process with unchanged deadlines. • Learning Objectives <p>Changes to FAFSA</p> <ol style="list-style-type: none"> 1. Eligibility – drug convictions, incarceration, sexual offense, addition of research/inclusive/accessible questions. 2. User Experience <ul style="list-style-type: none"> • 36 questions vs. 100 questions in the past. • myStudentAid app no longer available. • All contributors must have FSA ID/account. • Tax information import. • Title IV program changes. 3. Formulas <ul style="list-style-type: none"> • EFC replaced with SAI. • SAI can be negative to -1500 vs. EFC \$0. • Removal of number of family members in college. • Eliminate alternate EFC for enrollments less than 9 months. • Changes to data elements used to determine dependent or independent status (Formulas A,B,C). • Income components and allowances against income have changed.

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	<ul style="list-style-type: none"> • Asset components – child support, business size, farms, education savings account • Pell Grant amounts <p>4. Awarding Aid</p> <ul style="list-style-type: none"> • Statutory definition of Cost of Attendance (COA). • Determining Need. • Changes to professional judgment requirements. • Calculating Pell Grants. <p>Activity – Poll Everywhere: question(s) about trainee’s perceptions of benefits and disadvantages of FAFSA Simplification followed by group discussion.</p> <p>Closing</p> <ul style="list-style-type: none"> • Post-Training Evaluation Game (Kahoot) • Summary • Participant Survey
<i>Evaluation</i>	<p>10 multiple choice questions aligned to the learning objectives will be created in the Kahoot platform. The quiz game will serve as a pre-training evaluation to measure participants’ knowledge before training and as a post-training evaluation to measure learning at the end of training.</p> <p>Participants will complete a survey to answer questions to evaluate training at Kirkpatrick’s Level 1 and 2 (Reaction and Learning). Questions will also cover Level 3 (Behavior) to gather data as a pre-training evaluation for future trainings specific to each employee’s role and training pathway.</p>

<i>Training Title/Topic</i>	FAFSA Form Completion
<i>Target Audience</i>	Employees that answer questions directly related to completing the FAFSA form, including Customer Service Representatives, Day-to-Day Operators, and Campus Directors.
<i>Training Time</i>	4 hours (can be split into 2 two-hour sessions)
<i>Training Modality</i>	<p>1 VILT session with corresponding Slide Deck and activities; slide deck will be designed to enhance the training PowerPoint provided by Federal Student Aid. The VILT will engage trainees through hands-on practice with the FAFSA form, scenarios, and questions.</p> <p>1 SharePoint Page with external website links, embedded videos, and documents for easy reference on-the-job.</p>
<i>Learning Objectives</i>	<p>By the end of the session, the learner will be able to:</p> <ul style="list-style-type: none"> • Demonstrate the correct completion of portions of the FAFSA.

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	<ul style="list-style-type: none"> Identify answers to common questions about the FAFSA.
<i>Outline</i>	<p>Introduction</p> <ul style="list-style-type: none"> Pre-Training Evaluation: Emoji Selection and Thought Question Learning Objectives <p>FAFSA Scenario Walkthroughs</p> <ul style="list-style-type: none"> Facilitator will share screen and demonstrate how trainees can use split screen functions to see the meeting and the website at the same time. Throughout the session, different participants will share their screens in the meeting. The facilitator will model how to give instructions to someone who is completing the form. Participants will practice completing the FAFSA based on the scenarios given. Show Landing Page and Options to Create FSA Account. Visit https://fsapartners.ed.gov/fafsa-prototype/2425 Enter the access code: prototype2425 Practice all scenarios where the student is the user. <ul style="list-style-type: none"> Dependent Student. Independent Student with Spouse. Independent Student who is Single and Non-Tax Filer. Provisionally Independent Student. Needs to complete student section after parent launch. Practice all scenarios where the parent is the user. <ul style="list-style-type: none"> Invited as a Contributor. Starts form on the student's behalf. Practice all scenarios where the spouse or partner is the user. <ul style="list-style-type: none"> Parent spouse/partner invited as Contributor. Student spouse invited as Contributor. Practice FAFSA Submission Summary. <p>Question & Answer Time</p> <ul style="list-style-type: none"> Trainees may ask lingering questions. <p>Breakout Room Activity</p> <ul style="list-style-type: none"> Trainees will be divided into small groups of 2-3. Each group will be given a customer scenario on a collaborative board. Groups will generate the correct responses on the board and share the answers upon returning to the full meeting room. Discussion <p>Closing</p> <ul style="list-style-type: none"> Post-Training Evaluation Game (Gimkit) Summary Participant Survey

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	<p>SharePoint Page:</p> <ul style="list-style-type: none"> • FSA PowerPoint- https://fsapartners.ed.gov/sites/default/files/2023-07/2425FAFSAPreviewPresentation.pdf • FAFSA Landing Page- https://mkfkz9.axshare.com/?p=fafsa_landing_page&c=1&code=fcef31d78eb2e603867688036472e143&id=q96vn5 • FAFSA Submission Summary- https://mkfkz9.axshare.com/?p=submission_summary&c=1&code=fcef31d78eb2e603867688036472e143&id=wlh30q • FAFSA Help Topics- https://mkfkz9.axshare.com/?p=fafsa_help_center&c=1&code=fcef31d78eb2e603867688036472e143&id=tsltvs • FAFSA Demonstration Web Recording- https://www.youtube.com/watch?v=k26QnHn7Xcs • EFC to SAI Crosswalk- https://fsapartners.ed.gov/sites/default/files/2023-05/202425DRAFTSAIGuideSupplementEFCtoSAICrosswalk.pdf • Edited Video of VILT with annotations and transitions • Videos available from FSA Training Center
<i>Evaluation</i>	<p>20 multiple choice questions aligned to the learning objectives will be created in the Gimkit platform. The questions will include screenshots from the FAFSA form and scenario-based questions. The game will keep trainees engaged and motivated at the end of the training session. The questions will measure participants' learning and ability to meet the learning objectives after the training as well as evaluate training at Kirkpatrick's Level 2 and 3 (Learning and Behavior).</p> <p>Participants will complete a 5-question survey to further evaluate training at Kirkpatrick's Level 1-3 (Reaction, Learning, and Behavior).</p>

<i>Training Title/Topic</i>	Awarding Aid Using SAI
<i>Target Audience</i>	Employees involved in awarding financial aid, including Financial Aid Processors and Campus Directors
<i>Training Time</i>	3 hours (can be split into two 90-minute sessions)
<i>Training Modality</i>	<p>1 VILT session with corresponding Slide Deck and activities; slide deck will be designed to engage trainees with scenario-based activities.</p> <p>1 SharePoint page with website links, help documents, and videos.</p>
<i>Learning Objectives</i>	<p>By the end of the session, the learner will be able to:</p> <ul style="list-style-type: none"> • Calculate the Pell Grant award amount. • Determine need based on SAI.

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	<ul style="list-style-type: none"> Identify correct use of professional judgement.
<i>Outline</i>	<p>Introduction</p> <ul style="list-style-type: none"> Pre-Training Mentimeter activity Learning Objectives <p>Maximum Pell Grant Eligibility</p> <ul style="list-style-type: none"> Determine state of residence (Alaska and Hawaii are different). Identify the parent as single parent or not. Find information on corresponding table with family size and AGI. <p>Student Aid Index Calculation</p> <ul style="list-style-type: none"> Determine dependency status of student. Choose Formula A, B, or C. Changes from EFC formulas: <ul style="list-style-type: none"> Removal of number of family members in college, but income protection allowance (IPA) increased. Simplified Needs Test and Auto-Zero calculations are replaced with changes within the SAI formulas. Allowances against income includes Federal Work Study Program income, institutional grant and scholarships reported on federal tax return, American Opportunity and Lifetime Learning tax credit amounts, federal income tax paid, employment expense allowance, and IPA. Payroll tax allowance replaces Social Security tax allowance. Allowances against income does not include cooperative education employment earnings, child support paid, combat pay, or state or other tax allowances. Asset components includes child support. All sizes of business (not just 100+ employees) and net worth of farms (including family farm) are included in asset components. Education Savings Account is included in asset components <i>only</i> if it is designated for the applicant student. <p>Minimum Pell Grant Eligibility and Other Considerations</p> <ul style="list-style-type: none"> Enrollment Intensity Adjustments Year-Round Pell Grant Iraq and Afghanistan Service Grants Children of Fallen Heroes Award <p>Using Professional Judgement</p> <p>Calculating Financial Aid Package</p>

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	<ul style="list-style-type: none">• Cost of Attendance (COA)• SAI can be negative to -\$1500 <p>Practice Scenarios</p> <ul style="list-style-type: none">• Facilitator will share the scenario, then guide trainees through completing the process using the Whiteboard function and empty forms on-screen.• 4 different scenarios with dependent students.• 2 different scenarios with independent students with no dependents other than spouse.• 2 different scenarios with independent students with dependents. <p>Question and Answer Time</p> <ul style="list-style-type: none">• Trainees ask any lingering questions. <p>Closing</p> <ul style="list-style-type: none">• Post-Training Evaluation Game (Gimkit)• Summary• Participant Survey <p>SharePoint Page:</p> <ul style="list-style-type: none">• Eligibility for Max/Min Pell Grant- https://fsapartners.ed.gov/sites/default/files/2023-05/202425DRAFTSAIGuideSupplementEligibilityforMaxorMinPellGrantResource.pdf• Pell Eligibility and SAI Guide- https://fsapartners.ed.gov/sites/default/files/2022-11/202425DraftStudentAidIndexSAIandPellGrantEligibilityGuide.pdf• USDOE FAFSA Simplification Q&A- https://www2.ed.gov/policy/highered/reg/hearulemaking/2009/fafsa-q-and-a.html• Enrollment Intensity- https://fsapartners.ed.gov/sites/default/files/2023-05/202425DRAFTSAIGuideSupplementPellFormulasandEnrollmentIntensity.pdf• Edited Video of VILT with annotations and transitions• Videos available from FSA Training Center
<i>Evaluation</i>	20 multiple choice questions aligned to the learning objectives will be created in the Gimkit platform. The questions will include scenario-based questions for financial aid processing. The game will keep trainees engaged and motivated at the end of the training session. The questions will measure participants' learning and ability to meet the learning objectives after the training as well as evaluate training at Kirkpatrick's Level 2 and 3 (Learning and Behavior).

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	Participants will complete a 5-question survey to further evaluate training at Kirkpatrick's Level 1-3 (Reaction, Learning, and Behavior).
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