FINANCIAL AID FOR COLLEGE

HIGH SCHOOL TOOLKIT

www.NYFAFSAChallenge.org

NY FAFSA Challenge

The Education Trust—New York

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Dear School and District Leaders,

As you know, completing financial aid applications for college, like the Free Application for Federal Student Aid (FAFSA), Tuition Assistance Program (TAP) grants, and NYS DREAM Act forms, help eligible students get the financial aid they need and is a critical step on the path to college.Research shows that 90 percent of high school seniors who complete the FAFSA go to college immediately after graduation—compared to just 55 percent of seniors who do not complete the FAFSA. And New Yorkers are missing out on an estimated $152 million in federal financial aid by not filling out the FAFSA—plus additional resources they could have received from New York State TAP grants and NYS DREAM Act support.

Extensive research shows that high schools can make a significant difference in helping low-income and first-generation college hopefuls complete the FAFSA and other state financial aid applications.

The New York Financial Aid for College Completion Project is designed to provide data, resources, and recognition to support schools in improving financial aid application completion rates for eligible students who are low-income. As part of this effort, we are providing two resources to support your high school's eligible seniors to complete the FAFSA, TAP grant, and NYS DREAM Act applications:

- **HIGH SCHOOL TOOLKIT** – a collection of evidence-based steps your school can take each month from February through June to support student financial aid completion. The Toolkit includes a guide for schools to hold events like a financial aid for college completion night event and regular office hours to support students and families to complete financial aid applications for which they are eligible. It also includes templates – in English and Spanish – that your school can use to communicate effectively with students and families about important deadlines as well as opportunities to get support completing their applications. You can find the toolkit at **www.NYFAFSAChallenge.org**.

- **ONLINE DATA TOOL** – we've relaunched an online data tool that allows your high school to track its progress helping all eligible seniors complete the FAFSA. The tool includes comparisons to similar schools and the state's top-performers, as well as to the same period in the prior school year. You can find all of this information at **www.NYFAFSAChallenge.org**.

In addition to the resources above, we're also kicking off the second annual New York FAFSA Challenge to recognize high schools with the highest FAFSA completion rates and those that make the greatest improvements (the rules can be found at **www.NYFAFSAChallenge.org**). Challenge winners will receive a grant to be awarded to a college-going senior for the purpose of helping to cover tuition and other expenses.

Please contact us at **fafsa@edtrustny.org** if there is any additional information or assistance that we can provide.

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8 evidence-based practices to support *all* your seniors to complete their financial aid for college applications

FEBRUARY – JUNE 2020

Extensive research shows that high schools can make a big difference in helping low-income and first-generation college hopefuls complete the FAFSA and other state financial aid applications. In this toolkit, you'll find 8 evidence-based best practices your school can use to support all eligible seniors and their families to complete their FAFSA, TAP, and NYS DREAM Act applications.

This toolkit will support you in implementing the 8 evidence-based steps to support all seniors to complete their financial aid applications. You can find the toolkit materials listed in each step at **http://NYFAFSAChallenge.org/Resources**.

Completing these applications often requires follow-up after a student has submitted, including timely responses to verification requests from financial aid offices. So we've included reminders about both submission and follow-up in the strategies below.

1 HOLD A FINANCIAL AID FOR COLLEGE COMPLETION NIGHT

Hold a school-wide financial aid for college completion night in partnership with a community-based organization that has trusted relationships with students and their families. At the event, students and families should have access to computers and internet, as well as counselors and others to help complete their FAFSA, NYS DREAM Act, and TAP applications and respond to verification requests.

TIMELINE – It is best to hold the event as early as possible, typically in October; if you have not held one yet, we recommend scheduling it for February. It is important for students to complete the applications as early as possible to give them the best chance for the most aid. It is often helpful to hold your financial aid for college completion event at the same time as another mandatory event — such as a senior night — to ensure families can prioritize attendance.

TOOLKIT MATERIALS – **How-to guide: Financial aid for college completion night** (pages 19-20 of this Toolkit) and a **list of financial aid completion events in your area**

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2 HOLD REGULAR FINANCIAL AID FOR COLLEGE COMPLETION OFFICE HOURS

Hold regular office hours at least once per month for students and families to receive in-person or virtual support from school counselors or community experts to complete their FAFSA, NYS DREAM Act, and TAP application and respond to verification requests. Publicize these office hours by the end of February.

TIMELINE – Hold office hours at least once a month from February – June.

TOOLKIT MATERIALS – **How-to guide: Financial aid for college office hours** (page 21 of this Toolkit)

3 DEDICATE CLASS TIME TO FINANCIAL AID APPLICATION COMPLETION

Set aside some class time each week during the spring semester for students to work on their financial aid applications (and other postsecondary planning) and respond to verification requests.

TIMELINE – Classroom time set aside each week from February – June.

TOOLKIT MATERIALS – **How-to guide: Using class time for financial aid for college completion** (page 22 of this Toolkit) and **lesson plan templates** (pages 23-24 of this toolkit)

4 SEND REGULAR LETTERS OR EMAILS TO PARENTS/FAMILIES

Send monthly letters or emails out to families with reminders about the FAFSA, NYS DREAM Act, and TAP applications as well as information about upcoming opportunities to get support to complete those materials and respond to verification requests.

TIMELINE – Send a letter or email once per month from February – June.

TOOLKIT MATERIALS – **Monthly letters or emails templates in English and Spanish**

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5 POST UPDATES IN SCHOOL NEWSLETTERS, EMAILS, AND NEWSPAPERS

Include regular updates in the school newsletter, emails, or newspaper about the FAFSA, NYS DREAM Act, and TAP applications as well as information about upcoming opportunities to get support to complete those materials and respond to verification requests.

TIMELINE – Each school newsletter or newspaper that is released from February – June.

TOOLKIT MATERIALS – Monthly school newsletters, emails, and newspapers in English and Spanish

6 SEND REGULAR TEXTS AND ROBOCALLS TO FAMILIES

Using your school or district's text or robocall system, send out at least one update per month to families about financial aid completion and responses to verification requests, as well as to drive participation in your financial aid for college completion night and office hours.

TIMELINE – At least once per month from February –June and at least once per week in the weeks immediately preceding your financial aid for college completion night and office hours.

TOOLKIT MATERIALS – Pre-written text and robocall scripts in English and Spanish

7 POST REGULARLY ON YOUR SCHOOL'S SOCIAL MEDIA

Post regularly on your school's social media accounts about the FAFSA, NYS DREAM Act, TAP applications as well as information about upcoming opportunities to get support to complete those materials and respond to verification requests.

TIMELINE – At least once per week through June, as well as daily in the week leading up to key events such as the financial aid for college completion night and office hours.

TOOLKIT MATERIALS – Regular social media posts in English and Spanish

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8 USE DATA TO TRACK YOUR SCHOOL'S PROGRESS TOWARD FULL FAFSA COMPLETION

Regularly check in on your school's progress toward full FAFSA completion using our **www.NYFAFSAChallenge.org** website. You **should also join the NYS FAFSA Completion Initiative data access program** organized by the state's Higher Education Services Corporation to get student-level completion data. This information should be used to track how well your school's efforts are working and target resources to individual students and families who need support.

TIMELINE – Track progress and follow-up with students/families at least once per week from February – June.

TOOLKIT MATERIALS – **How-to guide: Using data to track your school's progress toward 100 percent financial aid for college completion** (pages 25-26 of this Toolkit)

NY state and federal financial aid for college overview

FEBRUARY – JUNE 2020

NY STATE AND FEDERAL FINANCIAL AID OVERVIEW

Financial aid for college education can come from the federal government, state government, or individual college institutions. Students should complete all of the federal and/or state financial aid applications for which they are eligible, which also helps the schools they are considering determine school-based aid.

Below is an outline of the major types of federal and state financial aid applications for which New York seniors are eligible.

FEDERAL FINANCIAL AID

- **FAFSA** – The FAFSA determines the amount of federal student financial aid (grants, loans, and other student aid) that seniors qualify for to pay for college. The FAFSA:
  - Is free to complete
  - Can be completed on your mobile phone
  - Should be completed as soon as possible, and by the end of the school year
  - Is only available to citizens of the U.S., U.S. national or eligible non-citizens such as:
    - Permanent U.S. residents with an Alien Registration Card (I-551)
    - Conditional permanent residents with an I-551C card
    - People with an Arrival Departure Record (I-94) from the Immigration and Naturalization Service (INS) with any of the following designations:
      - Refugee
      - Asylum granted
      - Parolee
      - Victim of human trafficking
      - T-Visa holder
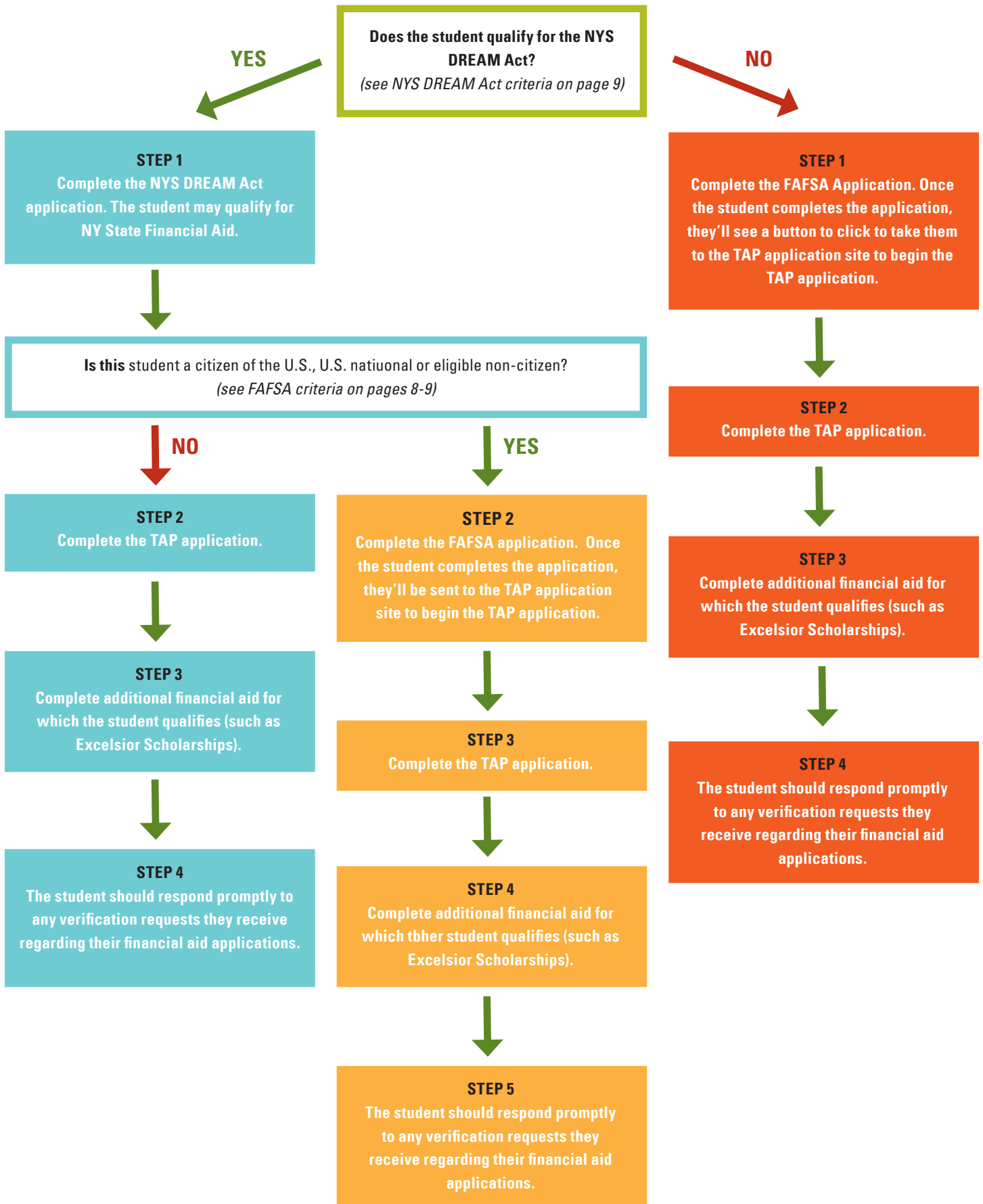   - Cuban-Haitian immigrant

- Before completing the FAFSA, all students and at least one of their parents must obtain a Federal Student Aid ID (FSA ID). This process only takes a few minutes, and the FSA ID will be used by students and parents to submit to the FAFSA. Students and parents can get their FSA IDs **here**. *Students with parents who are undocumented can still file the FAFSA. While parents who are undocumented are not able to obtain FSA IDs, they can print the signature page, complete it and send it in instead.*

- **FAFSA verification requests** – Many students will receive requests for verification of some of their FAFSA materials from colleges and universities after they submit their applications. It is very important that students respond promptly to these requests, as failure to respond can prevent their application from being processed.

NY STATE FINANCIAL AID

- **NYS DREAM Act** – The NYS DREAM Act determines eligibility to apply for New York State financial aid to pay for college or other college education. The NYS DREAM Act:
  - Is free to complete
  - Should be completed as soon as possible, and before the end of the school year
  - Will be held completely confidential by New York State and your college institution. Your immigration status will NOT be shared
  - Is available to undocumented students or U.S. citizens/permanent residents who:
    - Hold one of the immigration statuses below:
      - T-Visa
      - U-Visa
      - Temporary Protected Status
      - Hold no lawful immigration status
    - OR hold one of the citizenships statuses below:
      - U.S. Citizen whose permanent address is not in New York State
      - Paroled refugee whose permanent address is not in New York State
      - Permanent alien whose permanent address is not in New York State
    - AND have received a diploma or equivalency diploma OR who have qualified for in-state tuition at SUNY or CUNY colleges
      - Students who have received a high school equivalency diploma are NOT required to have attended a NY State high school for at least 2 years but students who have received a diploma must have attended a NY State high school for at least 2 years.
    - AND enroll in college or an accredited college institution within 5 years of earning their high school diploma or equivalency diploma

- **TAP** – The TAP application determines New York State residents' or NYS DREAM Act recipients' eligibility for New York State financial aid for college—most importantly, it is the state's major grant program. The TAP Application:
  - Is free to complete
  - Can be completed on your mobile phone
  - Should be submitted as soon as possible, and before the end of the school year
  - Is available only to New York State residents and NYS DREAM Act recipients

- **Excelsior Scholarship** – The Excelsior Scholarship provides additional tuition assistance for students to attend SUNY and CUNY colleges. The Excelsior Scholarship:
  - Is free to complete
  - Is available for students who are eligible for the NYS DREAM Act and/or TAP programs
  - Is available to students who have a combined adjusted gross income of $125,000 or less
  - Must be used in the pursuit of an undergraduate degree at a SUNY or CUNY college (this includes community colleges affiliated with SUNY and CUNY)
  - **See more information about eligibility for the Excelsior Scholarship here**

Process for completing all financial aid applications for which students are eligible

Does the student qualify for the NYS DREAM Act?
(see NYS DREAM Act criteria on page 9)

YES →

NO →

YES branch

STEP 1
Complete the NYS DREAM Act application. The student may qualify for NY State Financial Aid.

↓

Is this student a citizen of the U.S., U.S. natiuonal or eligible non-citizen?
(see FAFSA criteria on pages 8-9)

NO ↓

YES ↓

NO sub-branch

STEP 2
Complete the TAP application.

↓

STEP 3
Complete additional financial aid for which the student qualifies (such as Excelsior Scholarships).

↓

STEP 4
The student should respond promptly to any verification requests they receive regarding their financial aid applications.

YES sub-branch

STEP 2
Complete the FAFSA application. Once the student completes the application, they'll be sent to the TAP application site to begin the TAP application.

↓

STEP 3
Complete the TAP application.

↓

STEP 4
Complete additional financial aid for which tbher student qualifies (such as Excelsior Scholarships).

↓

STEP 5
The student should respond promptly to any verification requests they receive regarding their financial aid applications.

NO branch

STEP 1
Complete the FAFSA Application. Once the student completes the application, they'll see a button to click to take them to the TAP application site to begin the TAP application.

↓

STEP 2
Complete the TAP application.

↓

STEP 3
Complete additional financial aid for which the student qualifies (such as Excelsior Scholarships).

↓

STEP 4
The student should respond promptly to any verification requests they receive regarding their financial aid applications.

Checklist for schools

FEBRUARY – JUNE 2020

CALENDAR OF OUTREACH TO STUDENTS AND FAMILIES

**All resources mentioned in this checklist can be found at
http://NYFAFSAChallenge.org/Resources**

MONTH	CHECKLIST FOR SCHOOLS
FEBRUARY	☑ Schedule and hold a financial aid for college completion night for your school in February. Use the **How-to guide: Financial aid for college completion night** to begin planning the event
	◯ Schedule monthly financial aid for college office hours for your school from February through June. Use the **How-to guide: Financial aid for college office hours** to help plan these events. Make sure to hold your first financial aid for college office hours before the end of the month
	◯ Send out a kick-off letter or email in English and Spanish to parents/families **using this template**
	◯ Include a kick-off message in English and Spanish in your school newsletter or newspaper **using this template**
	◯ Post kick off messages on your social media accounts **using this template**
	◯ Include a school newsletter or newspaper update in English and Spanish **using these templates**
	◯ Use 1 hour of class time per week for students to work on their applications. Use our **How-to guide: Using class time for financial aid for college completion** and our **lesson plan templates** to plan that time
	◯ Track your school's progress toward 100 percent FAFSA completion **using this guide**
	◯ Post about additional financial aid completion events happening in your area on your school's website. **You can find information about upcoming events here**

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MONTH	CHECKLIST FOR SCHOOLS
MARCH	◯ Hold at least one financial aid for college office hours event in March. Use the **How-to guide: Financial aid for college office hours** to help plan the event
	◯ Send out an update letter or email in English and Spanish to parents/families **using this template**
	◯ Include a school newsletter or newspaper update in English and Spanish **using this template**
	◯ Post update messages on your social media accounts every week **using this template**
	◯ Include a school newsletter or newspaper update in English and Spanish **using this template**
	◯ Send a text or robocall in English and Spanish to families of seniors about your school's financial aid for college completion supports **using these templates**
	◯ Track your school's progress toward 100 percent FAFSA completion **using this guide**
APRIL	◯ Hold at least one financial aid for college office hours event in April. Use the **How-to guide: Financial aid for college office hours** to help plan the event
	◯ Send out an update letter or email in English and Spanish to parents/families using these templates
	◯ Include a school newsletter or newspaper update **using this template**
	◯ Post update messages on your social media accounts every week **using these templates**
	◯ Include a school newsletter or newspaper update in English and Spanish **using these templates**
	◯ Send a text or robocall in English and Spanish to families of seniors about your school's financial aid for college completion supports **using these templates**
	◯ Use 1 hour of class time per week for students to work on their applications. Use our **How-to guide: Using class time for financial aid for college completion** and our **lesson plan templates** to plan that time
	◯ Track your school's progress toward 100 percent FAFSA completion **using this guide**

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MONTH	CHECKLIST FOR SCHOOLS
MAY	○ Hold at least one financial aid for college office hours event in March. Use the **How-to guide: Financial aid for college office hours** to help plan the event
	○ Send out an update letter or email in English and Spanish to parents/families **using these templates**
	○ Include a school newsletter or newspaper update in English and Spanish **using these templates**
	○ Post update messages on your social media accounts every week **using these templates**
	○ Include a school newsletter or newspaper update in English and Spanish **using these templates**
	○ Send a text or robocall in English and Spanish to families of seniors about your school's financial aid for college completion supports **using these templates**
	○ Use 1 hour of class time per week for students to work on their applications. Use our **How-to guide: Using class time for financial aid for college completion** and our **lesson plan templates** to plan that time
	○ Track your school's progress toward 100 percent FAFSA completion **using this guide**
JUNE	○ Hold at least one financial aid for college office hours event in April. Use the **How-to guide: Financial aid for college office hours** to help plan the event
	○ Send out an update letter or email to parents/families **using this template**
	○ Include a school newsletter or newspaper update **using this template**
	○ Post update messages on your social media accounts every week **using these templates**
	○ Include a school newsletter or newspaper update in English and Spanish **using these templates**
	○ Send a text or robocall in English and Spanish to families of seniors about your school's financial aid for college completion supports **using these templates**
	○ Use 1 hour of class time per week for students to work on their applications. Use our **How-to guide: Using class time for financial aid for college completion** and our **lesson plan templates** to plan that time
	○ Track your school's progress toward 100 percent FAFSA completion **using this guide**
JULY	○ Post celebration messages on your social media accounts **using these templates**

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Frequently asked questions about college financial aid, the FAFSA, TAP application, and the NYS DREAM Act

FEBRUARY – JUNE 2020

There is a lot of private information requested to complete the applications. How is this information shared?

The information you provide on your college financial aid applications is used SOLELY for determining financial aid. It is shared only with the financial aid office and no other government entities.[1]

Who is eligible for the NYS DREAM Act? What is the deadline?

To be eligible for the NYS DREAM Act, students must:
- Hold one of the immigration statuses below:
  - T-Visa
  - U-Visa
  - Temporary Protected Status
  - Hold no lawful immigration status
- OR hold one of the citizenships statuses below:
  - U.S. Citizen whose permanent address is not in New York State
  - Paroled refugee whose permanent address is not in New York State
  - Green card holder whose permanent address is not in New York State
- AND have attended a New York State high school for at least 2 years and have received a diploma or equivalency diploma OR who have qualified for in-state tuition at SUNY or CUNY colleges
- AND enroll in college or an accredited college institution within 5 years of earning their high school diploma or equivalency diploma[2]

All students who are eligible should apply for the NYS DREAM Act as soon as possible, and before the end of the school year. **Click here to access the NYS DREAM Act**.

[1] https://financialaidtoolkit.ed.gov/tk/outreach/target/parents.jsp#parent-privacy
[2] https://www.hesc.ny.gov/pay-for-college/financial-aid/types-of-financial-aid/nys-grants-scholarships-awards/nys-dream-act-faq.html
[3] https://fafsa.ed.gov/help/fftoc03a.htm

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Who is eligible for the FAFSA? What is the deadline?

All students who are U.S. citizens, U.S. permanent residents, or other eligible noncitizens who will graduate from high school or have received their equivalency diploma by 2020. All students who are eligible should apply as soon as possible, and before the end of the school year.[3]

What happens if a student is eligible for the FAFSA, but their parents are undocumented?

There is a way to submit an application for the FAFSA if the student is eligible and their parents are undocumented. When filling out the FAFSA, the parent's Social Security number should be input as all zeros. Once the application gets to the signature page, the student and parents will need to print that page, have the parent sign it and mail it in to the address provided. Please note, students may need to request a signature page and mail it in. If you have any questions you can call the FAFSA hotline 1-800-433-3243.

This information will be shared ONLY with the financial aid office. NO other government offices or other entities will have access to this information.[4] Eligible students who have parents who are undocumented should be encouraged to apply for federal financial aid through the FAFSA application. You can support students and families to do this by explaining the federal protections. Please note that families can complete the NYS DREAM Act even if they do not complete the FAFSA.

Who is eligible for the TAP application? What is the deadline?

All students who are New York residents or eligible NYS DREAM Act recipients and will graduate from high school or have received their equivalency diploma by 2020. All students who are eligible should apply as soon as possible, and before the end of the school year.[5]

What documents do students and their families need in order to complete the FAFSA?

- All students and at least one of their parents must obtain a Federal Student Aid ID (FSA ID) in order to sign the FAFSA electronically – there should be one ID for the student and a separate ID for the parent – prior to completing their FAFSA. It takes only a few minutes and can be obtained **here**. Students with parents who are undocumented can still file the FAFSA. While parents who are undocumented are not able to obtain FSA IDs, they can print the signature page, complete it and send it in instead.

- The student's Social Security number

- The Social Security number from at least one of the students' parents (see question above if both parents are undocumented people)

- The student's driver's license if they have one

- The student's alien registration or permanent resident cards if the student is eligible for the FAFSA but is not a U.S. citizen

- Green card registration or permanent resident card from at least one of the student's parents if they parents are not U.S. citizens (see question above if both parents are people who are undocumented)

[4] https://financialaidtoolkit.ed.gov/tk/outreach/target/noncitizens.jsp
[5] https://www.hesc.ny.gov/pay-for-college/financial-aid/types-of-financial-aid/grants/tap-eligibility.html
[6] https://fafsa.ed.gov/help/before003.htm

- The parents' tax records from 2018 (if applying for aid for the 2020/2021 school year). **See this resource** if the parents do not live together, are not married or if the student has been legally declared independent

- The student's tax returns from 2018 if they filed one

- Records of untaxed income the family received, including Social Security benefits, welfare benefits, or veterans benefits[6]

Students should make sure that all the addresses they use on their financial aid applications use the same address as their parents/guardians used on their tax applications in 2018.

In what order should I complete the applications? What is the deadline?

If you are eligible for the FAFSA:

- Complete the FAFSA first. At the end of your FAFSA you'll be directed to the TAP site to complete your TAP application[7]

If you are eligible for the NYS DREAM Act:

- You must complete the NYS DREAM Act first

- Complete the TAP application second[8]

If you are eligible for the NYS DREAM Act and the FAFSA:

- You must complete the NYS DREAM Act first

- Complete the FAFSA second

- Complete the TAP application third

What are verification requests?

- Sometimes students and families are asked to submit copies of documents (generally income tax returns, W-2 forms, and 1099 forms) to help financial aid administrators certify that all the information submitted on the FAFSA form is accurate. If families receive an email notice, phone call or letter from a FAFSA administrator or college with a verification request, they should respond as quickly as possible with the requested information.[9]

Will I have to complete financial aid forms every year?

Yes. You must submit forms every year you are enrolled in college, and the earlier you do so the better. Usually the FAFSA, NYS DREAM Act, and TAP applications open October 1st, so mark your calendars for early October 2020![10]

[6] https://fafsa.ed.gov/help/before003.htm
[7] https://www.hesc.ny.gov/pay-for-college/apply-for-financial-aid/apply-for-aid-start-here.html
[8] https://www.hesc.ny.gov/pay-for-college/apply-for-financial-aid/nys-tap.html#horizontalTab2
[9] https://www.usnews.com/education/best-colleges/paying-for-college/articles/2015/03/02/do-4-things-if-your-fafsa-is-selected-for-verification
[10] https://fafsa.ed.gov/help/fftoc01e.htm

Are there any good resources online where I can get my questions answered or get additional support about financial aid?

- Yes! If you've been accepted by any college or university, the school's financial aid representatives are a great resource. They are experts in financial aid for college who you can meet with individually. In addition, many colleges and universities host admitted students events where you can also get financial aid support. You can also check out the online resources below:

  - **The How-To Guide for High School Students (And the Adults Who Help Them)** – from the New School's Center for New York City Affairs

  - **Q&A** about how to determine eligibility for the FAFSA

  - **Resources** for school counselors and teachers to help them support students who are undocumented or immigrants

  - **NYS DREAM Act Application and Eligibility Resources in Spanish**

  - **Guide** for how students and parents who are eligible can obtain an FSA ID

  - **Checklist** for students and parents of applications to have prior to completing their financial aid applications

  - **Q&A** about how to determine dependency status prior to completing the FAFSA

  - **7 videos** that can help walk you through completing your FAFSA

  - **FAFSA Tips and Common Mistakes to Avoid**

  - **IRS Data Retrieval Tool** – will electronically transfer your tax return information into your FAFSA

  - **Guide** for how to save your FAFSA and complete it later

  - Confidential FAFSA Hotline at 1-800-433-3243 or **chat** — to get questions answered by expert staff, your conversation and questions will be strictly confidential — if a student or their parents are undocumented, their information will NOT be shared

  - **Find financial aid information and completion events in your area**

  - **Find more financial aid information and completion events in your area**

  - **Information about the NYS DREAM Act**, including eligibility criteria, a link to the application itself and translations of all that information in Spanish, traditional Chinese, Haitian-Creole, Russian, Bengali and Korean.

  - Help estimating your potential financial aid award:

    - > **FAFSA**

    - > **TAP application**

    - > **College net price calculator**

How-to guide: Financial aid for college completion night

FEBRUARY – JUNE 2020

TOOLKIT STEPS

BY FEBRUARY 14, 2020

- Schedule a date in February to hold your financial aid for college completion night. This should include:

    - Confirming that your school counselor, school principal and at least 1-5 other school staff (depending on the size of your senior student body) are available and committed to attend

    - Partner with a trusted community-based organization (CBO) or your local college or university to co-host your financial aid for college completion night

    - Make sure you have people staffing your financial aid for college completion night who have expertise in completing the FAFSA, TAP application and NYS DREAM Act. This may be your school counselor, the CBO or local college or university you co-host with may have staff with expertise, or you can contact the Higher Education Services Corporation (HESC). HESC offers support to schools hosting FAFSA completion events free of charge. You can request HESC's support **using this form**

    - Ensuring translation services will be available to support families who may not speak English at home

    - Scheduling the event later in the evening – start after 6pm – so that families don't have to leave work early to attend

    - Holding the event on a night when there is another mandatory event (like a senior night) when families will already be at the school and there are not other school events (athletics, band concerts, plays, etc.) that might prevent participating students and their families from attending

    - Scheduling the event to last at least 2 hours to give families time to complete the applications there

    - Providing child care services at the event – you should contact CBOs in your area who may be able to help

    - Providing food at the event – you should contact CBOs in your area who may be able to help

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- Book a space at the school or a community-based center nearby to hold the event. This should include:
  - Holding it in the school computer lab or another room where students and families will have access to computers and reliable internet
  - Ensuring that students and families that bring their own laptops will have access to reliable WiFi
- Having places where students and families can have privacy to complete their applications given the amount of private information that they'll need to share on the applications. **Use these templates** to post weekly updates to your school's Facebook and Twitter accounts about the financial aid for college completion night
  - Schedule a training session for all school staff who will be at the financial aid for college completion night. Consider:
    - Having your school counselor lead the prep so that all staff know how to answer common question students and families have, as well as what applications they'll need to have with them. If your school counselor is unavailable or needs support on how to best support families to complete the FAFSA, TAP application, or NYS DREAM Act, they can contact **the New York State School Counselor Association**, **the New York State Financial Aid Administers Association**, and **New York Cares**. In addition, many CBOs and colleges/universities (including SUNY and CUNY locations) in your area may offer financial aid completion services for free

◯ BY FEBRUARY 28, 2020

- **Use these templates** to post weekly updates (and daily updates in the week prior to the event) in English and Spanish on your social media accounts.
- HOLD YOUR SCHOOL'S FINANCIAL AID FOR COLLEGE COMPLETION NIGHT

◯ BY MARCH 13, 2020

- **Use these templates** to post in English and Spanish about attendance and updates after your school's event

How-to guide: Financial aid for college office hours

FEBRUARY – JUNE 2020

TOOLKIT STEPS

✓ BY FEBRUARY 20, 2020

- Schedule regular times for at least one school staff person to be available for drop-in office hours for financial aide for college application completion. Consider:

  ⋯▸ Holding some of them in the evenings so families who work during the day don't have to miss work, and others during the day so that families who work during the evenings don't have to miss work

  ⋯▸ Holding them regularly (i.e. calling them Financial Aid Fridays and hosting them every other Friday) so that students and families can easily keep track of when they can get support

- Schedule a training session for all school staff who will be at any of your office hours. Consider:

  ⋯▸ Having your school counselor lead the prep so that all staff know how to answer common question students and families have, what forms students will need to have with them, and how to support students who need to respond to verification requests after they submit their applications. If your school counselor is unavailable or needs support on how to best support families to complete the FAFSA, TAP application or NYS DREAM Act, they can contact **the New York State School Counselor Association**, **the New York State Financial Aid Administers Association**, and **New York Cares**. In addition, many community-based organizations and colleges/universities (including SUNY and CUNY locations) in your area may offer financial aid completion services for free.

○ BY FEBRUARY 28, 2020

- Hold office hours at least once this month.

○ BY MARCH 31, 2020

- Hold office hours at least once this month.

○ BY APRIL 30, 2020

- Hold office hours at least once this month.

○ BY MAY 31, 2020

- Hold office hours at least once this month.

○ BY JUNE 30, 2020

- Hold office hours at least once this month.

Use these templates to post in English and Spanish about your school's office hours on your social media accounts

NY FAFSA Challenge

The Education Trust—New York

How-to guide: Using class time for financial aid for college completion

FEBRUARY – JUNE 2020

Once per week from February through June, set aside class time for seniors to work on their financial aid applications. This can be easily done during study halls, civics classes or college prep courses if your school holds them — but it is important to make sure that class time is reserved for all seniors whether or not they are in college prep courses. Please note that students should not be using their parents' FSA ID without the parent being present, so they will need to use the class time to work on pieces of their financial aid applications that do not require the parents' FSA ID. To get the most out of this time:

Let students — and parents/families — know in advance that they'll be using class time for financial aid application completion and to respond to any verification requests students receive. Give students the list of materials they may need from the **FAQ** on pages 15-18 of this Toolkit, so they can bring what they need to complete their applications.

Ensure that students will have privacy to complete their applications. They will have to submit private financial information, so it is vital that they have the space to do that.

Ensure all students will have access to a computer, laptop or mobile phone and reliable internet.

Have a school counselor available to answer questions students may have.

Students who have already submitted their applications should use the time for college applications or other work related to identifying and planning for their next steps after graduation.

Celebrate completion rates — post the percentage of students from your school who have completed their applications at the front of the room. You can look up your school's completion rates at the **NYS FAFSA Completion Initiative website** or at **www.NYFAFSAChallenge.org**.

Make sure students know about other opportunities to get support completing their applications and responding to verification requests — mention your school's financial aid for college completion night date as well as upcoming office hours.

NY FAFSA Challenge

The Education Trust—New York

Using class time for financial aid for college completion lesson plan templates

FEBRUARY – JUNE 2020

LESSON PLAN TEMPLATE

OBJECTIVES

- Students understand the importance of completing their financial aid applications
- Students know to submit their FAFSA, TAP application, and NYS DREAM Act as soon as possible, and before the end of the school year
- Students know which financial aid applications they qualify for
- Students work on their financial aid applications

MATERIALS

- Computers/mobile phones/laptops
- Reliable internet
- **FAQ** handout on pages 15-18 of this Toolkit
- Financial aid for college completion night and office hours logistics information

INTRODUCTION

- Instructor will distribute the FAQ handout and discuss the importance of completing all the steps of the FAFSA, TAP application, and NYS DREAM Act.
  - Completing all the financial aid applications for which you are eligible helps students get the financial aid they need and is a critical step on the path to college
  - Its very important for students to complete their forms as soon as possible, and to respond promptly to any verification requests they receive after submitting their applications

NY FAFSA Challenge

The Education Trust—New York

- Research shows that 90% of high school seniors who complete the FAFSA go to college immediately after graduation—compared to just 55% of seniors who do not complete the FAFSA
- New Yorkers are missing out on an estimated $152 million in federal financial aid by not filling out the FAFSA application—plus New York State TAP grants and NYS DREAM Act supports
- Instructor introduces school counselor who will be available to answer any questions students have

INSTRUCTION

- Ask students to move so that they have privacy to complete their financial aid applications
- As students begin completing their applications, monitor the room to answer questions and help ensure privacy

CLOSURE

- Discuss again the importance of completing all the financial aid applications students are eligible for as soon as possible and before the end of the school year
- Remind students about upcoming financial aid for college completion night and office hours

How-to guide: Using data to track your school's progress toward 100 percent financial aid for college completion

FEBRUARY – JUNE 2020

Data can be a powerful tool for you to use to support student financial aid application completion. You should use completion data to help inspire more students to complete their applications, refine your school's strategy for supporting students and families working on their applications, and celebrate your successes.

TOOLKIT STEPS

BY FEBRUARY 20, 2020

Designate one person on your staff to be the point person on student financial aid application completion data. This person should:

- Reserve about 30-45 minutes each week to track and report on your school's completion data

- Complete the necessary forms to register your school for the **NYS FAFSA Completion Initiative**. The Initiative is run by New York State's Higher Education Services Corporation (HESC), and will provide schools with up-to-date student-level information about your student's FAFSA and TAP application completion rates

EACH WEEK FROM FEBRUARY – JUNE 2020

The designated person on your staff should:

- Check the **NYS FAFSA Completion Initiative website** and track your school's FAFSA and TAP application completion rates

- Use our **online data tool** to track how your high school is doing helping all eligible seniors complete the FAFSA. This tool will be updated regularly as more students submit their applications

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- Ask some of the following questions to help analyze the data so it is most useful to your school's strategy to support financial aid application completion:

  - **?** Are there groups of students who have much higher or lower completion rates? (look at race, ethnicity, students who are low-income, gender, English language learner status, disability status, etc.) What unique barriers might those students face in completing their financial aid forms? How might your school be able to target support to reducing those obstacles?

  - **?** How does your school's financial aid completion rate compare to similar schools in New York State?

  - **?** Are completion rates for your school going up right around the completion evens you are hosting? If so, can you replicate those events or what is working at those events? If not, ask students and families who have attended those events what obstacles they are facing that may be preventing them from completing their applications. Make changes to your supporting events to help address their concerns.

- Using the data, each week the designated person on your staff should:

  - Follow-up with individual students and their families to encourage completion and offer support

  - Regularly post updates about your school's progress toward full completion on social media, on school announcement boards, and any other places where most students will see or hear the updates

  - Communicate regularly with students, families, teachers, counselors and school staff about your school's progress (you can add this information to the letter, email, social media and other materials for which we've provided templates in this toolkit)

  - Use the data to inspire younger students — they'll need to apply for financial aid when they become seniors and it's never too early to begin building their knowledge about the steps they'll need to take to get financial aid

Please contact us at fafsa@edtrustny.org if there is any additional information or assistance that we can provide.

Acknowledgements

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- The Hispanic Federation
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- The New York State Association for College Admission Counseling
- The New York State Council of School Superintendents
- The New York State School Counselors Association
- uAspire
- The Options Center at Goddard Riverside Community Center

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