

FINANCIAL AID FOR COLLEGE

HIGH SCHOOL TOOLKIT



www.NYFAFSAChallenge.org



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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), NYS Application for Tuition Assistance Program (TAP), and NYS DREAM Act forms, help eligible students get the financial aid they need and is a critical step on the path to college.

With the coronavirus pandemic-forced school closures last spring, and the reality of both in-person and remote learning during the 2020-21 school year, targeted support for students and families to submit their college financial aid forms is more important than ever.

Unfortunately, the percentage of high school seniors who completed the FAFSA in New York dropped last spring, with even lower completion rates at the high schools serving the greatest shares of students from low-income backgrounds. In the 2019-20 school year, approximately 61.7 percent of New York State public high school seniors completed the FAFSA by June 26, representing a decline of more than 2 percentage points in FAFSA completions compared to the previous two school years. FAFSA completion data also revealed that schools that enroll the largest shares of students from low-income backgrounds have a completion rate that is 13 percent lower than schools that enroll the smallest shares of students from low-income backgrounds.

Still, across New York State, many high schools remained committed to helping seniors complete the FAFSA during school closures. Schools hosted virtual workshops and one-on-one sessions to help students stay on track with their applications and helped families coordinate with financial aid offices.

We know that school leaders and staff have worked tirelessly to support students during the coronavirus pandemic. And extensive research shows that high schools can make a significant difference in helping low-income, immigrant, and first-generation college hopefuls complete the FAFSA and other state financial aid applications. So we are excited to release this updated version of our High School Toolkit to support efforts to help your students and families complete their financial aid applications.

The Toolkit includes a collection of evidence-based steps your school can take each month from October through June to support student financial aid completion whether your school is in-person or remote. It offers a guide for schools to hold in-person or virtual 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.

Over the next few months, we'll also be hosting a series of virtual trainings for school staff to learn more about supporting students and families to complete their financial aid applications, and releasing updated data tools to help schools track completion progress.

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

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

OCTOBER 2020 – JUNE 2021

Extensive research shows that high schools can make a big difference in helping low-income, immigrant, and first-generation college hopefuls complete the FAFSA and other state financial aid applications. With the reality of remote and in-person learning this year, targeted support from schools to help students and families complete their financial aid applications is more important than ever.

In this Toolkit, you'll find 10 evidence-based best practices your school can use to support all eligible seniors and their families to complete their FAFSA, NYS Application for TAP, and NYS DREAM Act forms. You can find the Toolkit materials listed in each step at <https://newyork.edtrust.org/fafsa-toolkit/>.

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

1



HOLD A VIRTUAL OR IN-PERSON FINANCIAL AID FOR COLLEGE COMPLETION NIGHT

Hold a virtual or in-person school wide financial aid for college completion night in partnership with a community-based organization (CBO) that has trusted relationships with students and their families. It may be particularly helpful to partner with a CBO that has expertise supporting students who are undocumented with college access. Trained school staff should be available to support students and families as they complete their FAFSA, NYS Application for TAP, and NYS DREAM Act forms and respond to verification requests. **Schools should determine which students do not participate in an in-person or virtual event and follow up with them individually.**

IN-PERSON

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 Application for TAP, and NYS DREAM Act forms and respond to verification requests. It is often helpful to hold your event at the same time as another mandatory event — such as senior night — to ensure families can prioritize attendance. Schools should follow CDC guidelines regarding health and safety protocols for holding in-person events during the coronavirus pandemic.

REMOTE

Send seniors and their families a link to a Zoom or other virtual meeting room. Record the event so that students and families that may not have access to internet or smart devices at the time of the event can still view it.

BOTH

It is encouraged, if your school is on a hybrid model, to host the event both in person and online so that multiple avenues are used for students to access the content.



TIMELINE – It is best to hold the event as early as possible, typically in November. You should also consider holding a second event in late January as students are returning for the second semester. It is important for students to complete the applications as early as possible to give them the best chance for the most aid.



TOOLKIT MATERIALS – [How-to guide: Financial aid for college completion night](#) (pages 17-18 of this Toolkit) and [a list of financial aid completion events in your area or remote and accessible to all New Yorkers](#)

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 Application for TAP, and NYS DREAM Act forms and respond to verification requests. Publicize these office hours, and include personalized messages to each high school senior by the end of October.

IN-PERSON

During office hours, students and families should have access to counselors and other trained staff who can answer questions as well as help complete their FAFSA, NYS Application for TAP, and NYS DREAM Act forms and respond to verification requests.

REMOTE

Create a virtual meeting room and keep the link the same throughout the year so it is more easily accessible to students and families. Students and families should be able to speak with a counselor and other trained staff, including in private breakout rooms.



TIMELINE – Hold office hours at least once per month from October – June.



TOOLKIT MATERIALS – [How-to guide: Financial aid for college office hours](#) (pages 19-20 of this Toolkit)

3



DEDICATE CLASS TIME TO FINANCIAL AID APPLICATION COMPLETION

Set aside 1 hour of class time each week during the year for students to work on their financial aid applications (and other postsecondary planning) and respond to verification requests.

IN-PERSON

Consider using homeroom or mandatory study hall periods to regularly dedicate time to student financial aid completion.

REMOTE

Incorporate financial aid completion into your lesson plans. Ensure that during the dedicated class time, students are in direct contact with the school so that they can ask questions and get immediate responses.



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



TOOLKIT MATERIALS – [How-to guide: Financial aid for college office hours \(pages 21-22 of this Toolkit\)](#) and [lesson plan template \(pages 23-24 of this Toolkit\)](#)

4



SEND REGULAR LETTERS OR EMAILS TO FAMILIES

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



TIMELINE – Send a letter and email once per month from October – June.



TOOLKIT MATERIALS – [Monthly letters and emails templates in English and Spanish](#)

5



POST UPDATES IN SCHOOL NEWSLETTERS, EMAILS, AND NEWSPAPERS

Include regular updates in the school newsletter, emails, and newspapers about the FAFSA, NYS Application for TAP, and NYS DREAM Act forms 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 October – June.



TOOLKIT MATERIALS – [Monthly updates for 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 and students about financial aid completion and responses to verification requests. You can also use those systems to drive participation in your financial aid for college completion night and office hours.



TIMELINE – At least once per month from October – 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 Application for TAP, and NYS DREAM Act forms 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 from October – June, as well as daily in the week immediately 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**

8



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

Regularly check on your school's progress toward full FAFSA completion. This October, you should join the **NYS FAFSA Completion Initiative data access program** organized by the state's Higher Education Services Corporation (HESC) to get student-level completion data. You should also check the **www.NYFAFSAChallenge.org** website starting in early 2021. The information from both of these sites 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 and families at least once per week from January – 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)

9



ADD A SECTION TO YOUR SCHOOL WEBSITE WITH INFORMATION ABOUT FINANCIAL AID FOR COLLEGE COMPLETION

In a prominent place on your website, post information about the importance of financial aid for college completion, a list of the supports your school is offering to students, and links to resources that students and families can use to help them complete their applications.



TIMELINE – Add the section to your website by mid-October, and regularly update it with new information through June.



TOOLKIT MATERIALS – [Pre-written copy for your school website section on financial aid for college completion in English and Spanish](#)

10



ENSURE THAT YOUR SCHOOL COUNSELOR AND AT LEAST 2-3 OTHER SCHOOL STAFF ATTEND A TRAINING ABOUT HOW TO SUPPORT STUDENTS TO COMPLETE THEIR FINANCIAL AID FOR COLLEGE APPLICATIONS

In October, November, and January, we will be hosting virtual trainings available to staff from schools that are utilizing this Toolkit to drive financial aid for college completion during the should be 2020-21 school year. Our trainings will offer specific instruction on supporting students who are undocumented or who have parents who are undocumented navigate the college financial aid application process. Sign your school up for access to these trainings at www.NYFAFSACHallenge.org.



TIMELINE – Sign up for access to the fall trainings in October 2020. Sign up for access to the spring trainings in early January 2021.



TOOLKIT MATERIALS – Sign up for trainings at www.NYFAFSACHallenge.org

Checklist for schools

OCTOBER 2020 - JUNE 2021

CALENDAR OF FINANCIAL AID FOR COLLEGE SUPPORTS FOR STUDENTS AND FAMILIES

All resources mentioned in this checklist can be found at <https://newyork.edtrust.org/fafsa-toolkit>

MONTH	CHECKLIST FOR SCHOOLS
OCTOBER	<ul style="list-style-type: none"> <li data-bbox="407 741 1495 898"> <input checked="" type="checkbox"/> Schedule a financial aid for college completion night for your school in November and another in January. This can be held in person or virtually. Use the How-to guide: Financial aid for college completion night to begin planning the event. <li data-bbox="407 932 1495 1178"> <input type="checkbox"/> Schedule monthly financial aid for college office hours for your school from October – June. Office hours can be held in person or virtually. 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. Publicize your office hours, and include personalized messages to each high school senior. <li data-bbox="407 1211 1463 1287"> <input type="checkbox"/> Send out a kick-off letter or email in English and Spanish to families using this template. <li data-bbox="407 1320 1490 1396"> <input type="checkbox"/> Include a kick-off message in English and Spanish in your school newsletter or newspaper using this template. <li data-bbox="407 1430 1442 1465"> <input type="checkbox"/> Post kick-off messages on your social media accounts using this template. <li data-bbox="407 1499 1479 1659"> <input type="checkbox"/> Use 1 hour of class time per week — during home room or study halls for example — 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 fill that time. <li data-bbox="407 1692 1495 1768"> <input type="checkbox"/> Identify 2-3 staff members from your school to attend the October and November trainings offered to schools using this Toolkit. Sign up on our website. <li data-bbox="407 1801 1490 1837"> <input type="checkbox"/> Update your school’s financial aid for college website section using this guide. <li data-bbox="407 1871 1474 1946"> <input type="checkbox"/> Track your school’s progress toward 100 percent FAFSA completion using this guide.

MONTH	CHECKLIST FOR SCHOOLS
NOVEMBER	<ul style="list-style-type: none"> <input type="radio"/> Hold a financial aid for college completion night this month. Use the How-to guide: Financial aid for college completion night to begin planning the event. <input type="radio"/> Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. <input type="radio"/> Send out an update letter or email in English and Spanish to families using this template. <input type="radio"/> Post update messages on your social media accounts every week using this template. <input type="radio"/> Include a school newsletter or newspaper update in English and Spanish using this template. <input type="radio"/> 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. <input type="radio"/> Use 1 hour of class time per week —during home room or study halls for example— 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 fill that time. <input type="radio"/> Ensure 2-3 staff members from your school attend the November training offered to schools using this Toolkit. Sign up on our website. <input type="radio"/> Update your school's financial aid for college website section using this guide. <input type="radio"/> Track your school's progress toward 100 percent FAFSA completion using this guide.

MONTH	CHECKLIST FOR SCHOOLS
DECEMBER	<ul style="list-style-type: none"> ○ Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. ○ Send out an update letter or email in English and Spanish to families using these templates. ○ Post update messages on your social media accounts every week 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 — during home room or study halls for example — 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 fill that time. ○ Identify 2-3 staff members from your school attend the January trainings offered to schools using this Toolkit. Sign up on our website. ○ Update your school's financial aid for college website section using this guide. ○ Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually. ○ Track your school's progress toward 100 percent FAFSA completion using this guide.

MONTH	CHECKLIST FOR SCHOOLS
JANUARY	<ul style="list-style-type: none"> <li data-bbox="407 174 1479 254">○ Hold a financial aid for college completion night this month. Use the How-to guide: Financial aid for college completion night to begin planning the event. <li data-bbox="407 285 1511 443">○ Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. <li data-bbox="407 474 1458 554">○ Send out an update letter or email in English and Spanish to families using these templates. <li data-bbox="407 585 1450 665">○ Post update messages on your social media accounts every week using these templates. <li data-bbox="407 697 1495 777">○ Include a school newsletter or newspaper update in English and Spanish using these templates. <li data-bbox="407 808 1487 888">○ 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. <li data-bbox="407 919 1474 1077">○ Use 1 hour of class time per week — during home room or study halls for example — 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 fill that time. <li data-bbox="407 1108 1507 1188">○ Ensure 2-3 staff members from your school attend the January trainings offered to schools using this Toolkit. Sign up on our website. <li data-bbox="407 1220 1490 1257">○ Update your school's financial aid for college website section using this guide. <li data-bbox="407 1289 1458 1369">○ Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually. <li data-bbox="407 1400 1479 1480">○ Track your school's progress toward 100 percent FAFSA completion using this guide.

MONTH	CHECKLIST FOR SCHOOLS
<p style="text-align: center;">FEBRUARY</p>	<ul style="list-style-type: none"> <input type="radio"/> Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. <input type="radio"/> Send out an update letter or email to families using this template. <input type="radio"/> Post update messages on your social media accounts every week using these templates. <input type="radio"/> 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. <input type="radio"/> Use 1 hour of class time per week — during home room or study halls for example — 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 fill that time. <input type="radio"/> Track your school’s progress toward 100 percent FAFSA completion using this guide. <input type="radio"/> Update your school’s financial aid for college website section using this guide. <input type="radio"/> Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually.
<p style="text-align: center;">MARCH</p>	<ul style="list-style-type: none"> <input type="radio"/> Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. <input type="radio"/> Send out an update letter or email to families using this template. <input type="radio"/> Include a school newsletter or newspaper update in English and Spanish using these templates. <input type="radio"/> Post update messages on your social media accounts every week using these templates. <input type="radio"/> 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. <input type="radio"/> Use 1 hour of class time per week — during home room or study halls for example — 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 fill that time. <input type="radio"/> Track your school’s progress toward 100 percent FAFSA completion using this guide. <input type="radio"/> Update your school’s financial aid for college website section using this guide. <input type="radio"/> Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually.

MONTH**CHECKLIST FOR SCHOOLS****APRIL**

- Hold at least one financial aid for college office hours event. Use the **How-to guide: Financial aid for college office hours** to help plan the event. Publicize your office hours, and include personalized messages to each high school senior.
- Send out an update letter or email to families **using this template**.
- 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**.
- 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 — during home room or study halls for example — 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 fill that time.
- Track your school's progress toward 100 percent FAFSA completion **using this guide**.
- Update your school's financial aid for college website section using **this guide**.
- Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually.

MONTH	CHECKLIST FOR SCHOOLS
MAY	<ul style="list-style-type: none"> <input type="radio"/> Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. <input type="radio"/> Send out an update letter or email to families using this template. <input type="radio"/> Include a school newsletter or newspaper update in English and Spanish using these templates. <input type="radio"/> Post update messages on your social media accounts every week using these templates. <input type="radio"/> 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. <input type="radio"/> Use 1 hour of class time per week — during home room or study halls for example — 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 fill that time. <input type="radio"/> Track your school's progress toward 100 percent FAFSA completion using this guide. <input type="radio"/> Update your school's financial aid for college website section using this guide. <input type="radio"/> Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually.

MONTH	CHECKLIST FOR SCHOOLS
JUNE	<ul style="list-style-type: none"> <input type="radio"/> Hold at least one financial aid for college office hours event. Use the How-to guide: Financial aid for college office hours to help plan the event. Publicize your office hours, and include personalized messages to each high school senior. <input type="radio"/> Send out an update letter or email to families using this template. <input type="radio"/> Include a school newsletter or newspaper update in English and Spanish using these templates. <input type="radio"/> Post update messages on your social media accounts every week using these templates. <input type="radio"/> 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. <input type="radio"/> Use 1 hour of class time per week — during home room or study halls for example — 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 fill that time. <input type="radio"/> Track your school's progress toward 100 percent FAFSA completion using this guide. <input type="radio"/> Update your school's financial aid for college website section using this guide. <input type="radio"/> Determine which seniors have not yet participated in an in-person or virtual completion night or office hours and follow-up with them individually.
JULY	<ul style="list-style-type: none"> <input type="radio"/> Post celebration messages on your social media accounts using these templates.

How-to guide: Financial aid for college completion night

OCTOBER 2020 AND JANUARY 2021

TOOLKIT STEPS

BY OCTOBER 16, 2020 AND JANUARY 15, 2021

- Schedule a date in November and another by mid-February to your financial aid for college completion nights. Financial aid for college completion nights can be held virtually or in person. This should include:
 - ❖ Partnering with a trusted community-based organization (CBO) or your local college or university to co-host your financial aid for college completion night.
 - > Some CBOs in New York that support college financial aid completion are **UnLocal in NYC**, **College Bridge Cafe**, and **Latino U College Access**
 - ❖ Making sure you have people staffing your virtual or in-person financial aid for college completion night who have expertise in completing the FAFSA, NYS Application for TAP, and NYS DREAM Act forms. Schools should identify 2-3 staff members to attend the **October, November, and January trainings available to schools that are using this Toolkit**. In addition, the CBO or local college or university you co-host with may have staff with expertise, or you can contact HESC at **PreCollegeServices@hesc.ny.gov**. HESC offers support to schools hosting FAFSA completion events free of charge. 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 most families don't have to leave work early to attend.

IF YOUR SCHOOL IS IN-PERSON

- ❖ 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 questions 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, NYS Application for TAP, or NYS DREAM Act forms, they can attend the free October, November, or January trainings offered to schools using this Toolkit, or contact **the New York State School Counselor Association**,

the New York State Financial Aid Administrators Association, or **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

- ❖ 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.
- 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 internet.
- 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.

IF YOUR SCHOOL IS OPERATING REMOTELY

- ❖ Recording any presentation part of the event so that students and families who are not able to attend live can view the recording.

○ BY NOVEMBER 30 AND FEBRUARY 12

- **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 DECEMBER 11 AND FEBRUARY 19

- **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

OCTOBER 2020 - JUNE 2021

TOOLKIT STEPS

✓ BY OCTOBER 16, 2020

- Schedule regular times for at least one school staff person to be available for drop-in office hours for financial aid for college application completion each month from October through June. These can be held in-person or virtually depending on your school's reopening status. 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 (e.g. 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:
 - Ensuring that your school counselor and at least 2-3 other school staff attend a training about how to support students to complete their financial aid for college applications. We will be hosting virtual trainings available to staff from schools that are utilizing this Toolkit to drive financial aid for college completion during the 2020-21 school year. Sign your school up for access to these trainings [on our website](#).

○ BY OCTOBER 31, 2020

- Hold office hours at least once this month.

○ BY NOVEMBER 30, 2020

- Hold office hours at least once this month.

○ BY DECEMBER 31, 2020

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.

○ BY JANUARY 31, 2021

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.



TIMELINE – Sign up for access to the fall trainings in October 2020. Sign up for access to the spring trainings in early January 2021.

- Having your school counselor and other school staff who attend a training lead the prep so that all staff know how to answer common questions 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 needs additional support on how to best support families to complete the FAFSA, NYS Application for TAP, or NYS DREAM Act forms, contact [the New York State School Counselor Association](#), [the New York State Financial Aid Administrators Association](#), or [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.

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

○ **BY FEBRUARY 28, 2021**

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.

○ **BY MARCH 31, 2021**

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.

○ **BY APRIL 30, 2021**

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.

○ **BY MAY 31, 2021**

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.

○ **BY JUNE 30, 2021**

- Hold office hours at least once this month.
- Identify the seniors who have not yet attended office hours or a financial aid completion night and reach out to them individually.

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

OCTOBER 2020 - JUNE 2021

Once per week from October – June, set aside class time for seniors to work on their financial aid applications. This can be easily done either virtually or in person during study halls, civics classes, or college prep courses if your school holds them — but it is important to make sure that class time, or remote learning time during which students have immediate access to a teacher or school counselor, is reserved for all seniors whether or not they are in college prep courses or planning to attend college.

School staff using these lesson plans should sign up for the October, November, or January trainings offered to schools using this Toolkit to help ensure they are well equipped to support students through this process.

Please note that students should not be using their parents' FSA ID without the parent being present, so unless the parent is present during the remote class time, students 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:

GENERAL TIPS AND TO DOS



Let students — and 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 31-35 of this Toolkit, so they can gather what they need to complete their applications.



Celebrate completion rates — post the percentage of students from your school who have completed their applications on your school website, and talk about it during class time. Beginning in late January, you can look up your school's completion rates at the NYS FAFSA Completion Initiative website or at www.NYFAFSACHallenge.org.



- 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.



- 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 as well as upcoming office hours.

TIPS AND TO-DOS FOR IN-PERSON



- 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.



- Have a school counselor or another staff person who has attended a financial aid for college training available in-person to answer questions students may have.



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

TIPS AND TO-DOS FOR REMOTE LEARNING



- Come up with a plan to support students who may not have access to a computer, laptop, or mobile phone, and reliable internet during the dedicated financial aid for college completion class time. You could consider offering those students dedicated office hours time during a period when they will have access to devices and internet.



- Incorporate financial aid for college in your lessons, and ensure that trained staff are available during the lesson to answer questions in real time.

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

OCTOBER 2020 - JUNE 2021

LESSON PLAN TEMPLATE



OBJECTIVES

- Students understand the importance of completing their financial aid applications whether or not they are sure about attending college. Applying for financial aid early helps students get a better sense of their options after graduation, so it is important for all students to complete their applications
- Students know to submit their FAFSA, NYS Application for TAP, and NYS DREAM Act forms as soon as possible to maximize their opportunity for the most financial aid
- Students know which financial aid applications they qualify for
- Students work on their financial aid applications and verification requests



MATERIALS

- Ideally, students should have access to a computer, laptop, or mobile phone, and reliable internet
- As a link, digital copy, or printed copy, students should have access to the FAQ handout on pages 31-35 of this Toolkit
- As a link, digital copy, or printed copy, students should have the financial aid for college completion night and office hours logistics information



INTRODUCTION

In-person, or using live video, recorded video, or live audio call, the instructor will remind students where they can find the FAQ handout and discuss the importance of completing all the steps of the FAFSA, NYS Application for TAP, 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

- It is 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
- 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
- New Yorkers are missing out on an estimated \$152 million in federal financial aid by not filling out the FAFSA — plus NYS Application for TAP and NYS DREAM Act supports



INSTRUCTION

- Give students the rest of the time to work individually on their applications and verification requests. The instructor should remain available including via text, phone call, and video call/chat if possible so that students can receive immediate responses to their questions.



CLOSURE

- At the end of class time, remind students verbally, or send students a text and email reminding them about upcoming class time to work on applications, as well as financial aid for college completion nights and office hours.

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

OCTOBER - JUNE 2021

Data can be a powerful tool for you to use to support student financial aid completion. The NYS FAFSA Completion Initiative data from HESC will be available this fall. Our online data tool will be available beginning in early 2021. 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 OCTOBER 16, 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 NYS Application for TAP completion rates

EACH WEEK FROM OCTOBER – JUNE 2021

The designated person on your staff should:

- Check the **NYS FAFSA Completion Initiative website** and track your school's FAFSA and NYS Application for TAP completion rates
- Starting in early 2021, 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

- 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:
 - ❓ Did your school’s FAFSA completion rates decline last spring when schools began remote learning? What strategies can you put in place this year if there is remote learning to support all seniors to complete their financial aid for college forms?
 - ❓ 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 events 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

NY State and federal financial aid for college overview

OCTOBER 2020 – JUNE 2021

FEDERAL FINANCIAL AID AND NY STATE 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. Federal and state financial aid applications help 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 application asks questions about the student’s and the parent’s income, assets, and household to help determine the amount of aid.
 - Is free to complete
 - Can be completed on your mobile phone, tablet, or computer
 - Should be completed as soon as possible, and by the end of the school year
 - Federal financial aid is only available to citizens of the U.S., U.S. nationals, 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

- > DACA-mented students should also complete the FAFSA application (along with the NYS DREAM Act). Although DACA-mented students are not eligible for federal aid through the FAFSA, colleges use the FAFSA information to help determine institution-based aid that DACA-mented students are eligible for.
- 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 the FAFSA. Students and parents can get their FSA IDs [here](#). You will have to enter your Social Security Number to obtain a FSA ID. *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 the mail instead. If a student or their parent is an undocumented person, they can find very helpful information about your eligibility for the FAFSA [here](#).*
- **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

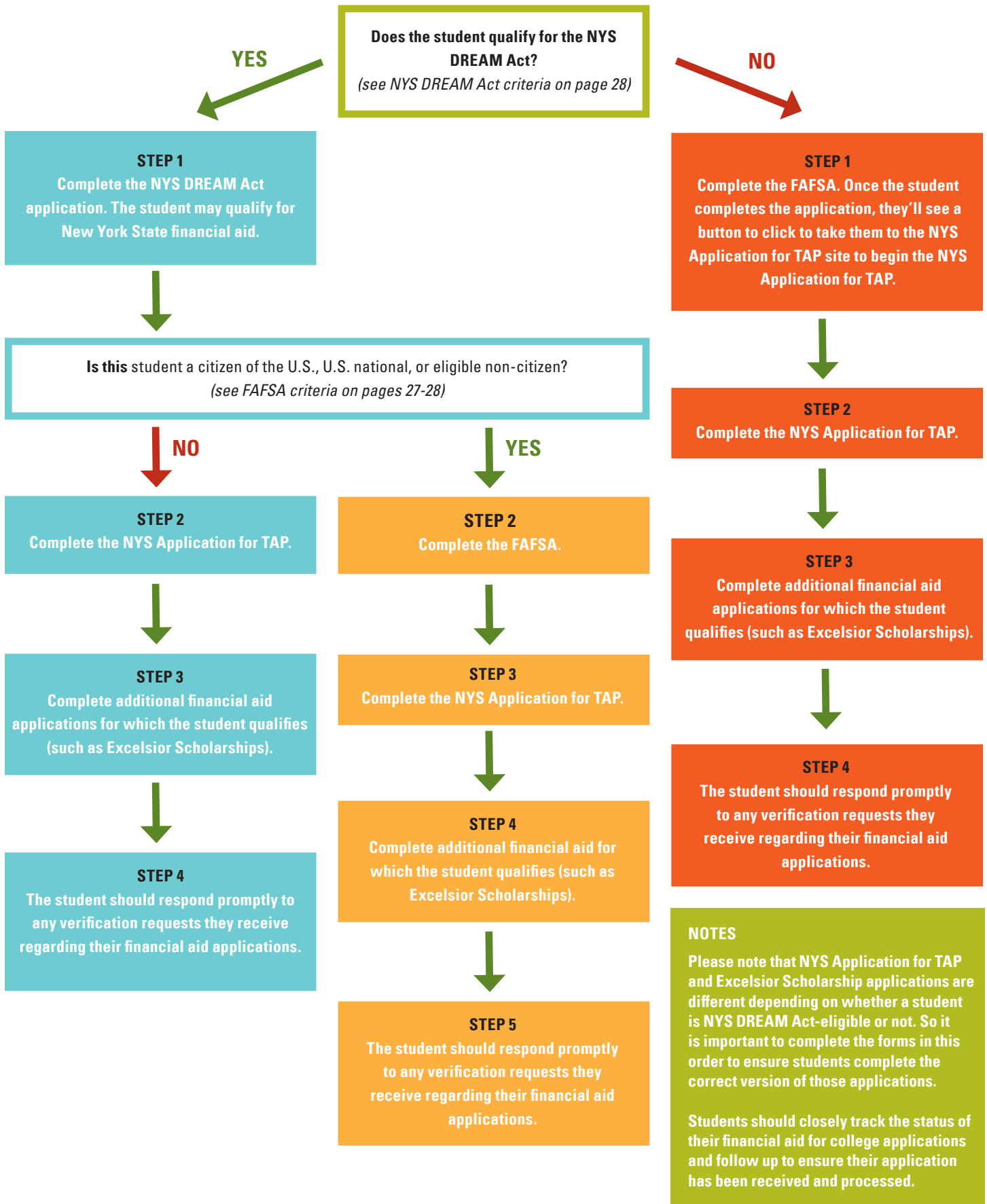
- **NYS DREAM Act** – The NYS DREAM Act determines eligibility to apply for New York State financial aid to pay for college or other post-secondary education. It will open the door to multiple state financial assistance programs, including the NYS Application for TAP grant and Excelsior Scholarships. The NYS DREAM Act:
 - ❖ Is free to complete
 - ❖ Should be completed as soon as possible, and before the end of the school year
 - ❖ Can be completed on your mobile phone, tablet, or computer
 - ❖ Will be held completely confidential by New York State and your college institution. Your immigration status will NOT be shared
 - ❖ Is available to students who:
 - + Hold one of the immigration statuses below:
 - > T-Visa
 - > U-Visa
 - > Temporary Protected Status
 - > Hold no lawful immigration status (including undocumented and DACA-mented students)
 - + 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 non-citizen whose permanent address is not in New York State

- + AND have received a New York State high school 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 high school 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
 - > 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.
- **NYS Application for TAP** – The NYS Application for TAP determines New York State residents’ or NYS DREAM Act-eligible students’ eligibility for New York State financial aid for college—most importantly, it is the state’s major grant program. The NYS Application for TAP:
 - ❖ Is free to complete
 - ❖ Can be completed on your mobile phone, tablet, or computer
 - ❖ 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 NYS Application for TAP programs
 - ❖ Is available to students whose families 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**

NOTES

In addition to federal and state aid, many schools offer financial aid packages. You should begin applying for institution-based aid even before you are accepted to a school. Students may also need to complete the CSS Profile. This form is administered by the College Board. It is a fee-based application for institutional aid, which is only required by some

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



Frequently asked questions about college financial aid, the FAFSA, NYS Application for TAP, and the NYS DREAM Act forms

OCTOBER 2020 – JUNE 2021

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 high school diploma or equivalency diploma OR 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 diploma²

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 application.](#)

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>

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

All students who are U.S. citizens, U.S. permanent residents, or other eligible non-citizens who will graduate from high school or have received their equivalency diploma by 2021. All students who are eligible should apply as soon as possible, and before the end of the school year.³ Most colleges use FAFSA as a starting point for determining how much financial support a student will need, so the earlier a student can submit their FAFSA, the earlier they can work with their college to determine other financial aid supports that might be available to them.

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 at 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. 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.

How can immigrant students who are documented or undocumented get support to navigate college financial aid?

Immigrants (documented and undocumented) often have a harder time finding the supports they need to access financial aid for college. High schools that make a concerted effort to train staff in the financial aid application process and support immigrant students to navigate it can make a big difference. Community based organizations such as **Unlocal in NYC**, **College Bridge Cafe**, and **Latino U College Access** can provide additional expert support.

Who is eligible for the NYS Application for TAP? What is the deadline?

All students who have been residents of New York for at least one year and will graduate from high school or have received their equivalency diploma in 2021. 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.

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>

- The student’s Social Security number
- The Social Security number, or green card number, from at least one of the students’ parents (see question above if both parents are people who are undocumented). If a student lives with both parents, they will need to provide both parents’ Social Security numbers or green card numbers.
- 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 their parents are not U.S. citizens (see question above if both parents are people who are undocumented)
- The parents’ tax records from 2019 (if applying for aid for the 2021-22 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 2019, if they filed one
- Records of untaxed income the family received, including Social Security benefits, welfare benefits, or veterans benefits⁶

Students should make sure that the address they use on their financial aid applications is the same address their parents used on their tax applications in 2019.

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 NYS Application for TAP site to complete your application⁷

If you are eligible for the NYS DREAM Act:

- You must complete the NYS DREAM Act first
- Complete the NYS Application for TAP second⁸

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 NYS Application for TAP third

What are verification requests?

- It is common for students and families to be 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

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>

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 Students and families should reach out to schools for support if you receive verification requests. Verification requests are not unusual, and schools can help navigate how to respond promptly.

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 Application for TAP, and NYS DREAM Act forms open October 1st.

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 whom 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 materials to have prior to completing their financial aid applications
 - ❖ **Q&A** about how to determine dependency status prior to completing the FAFSA
 - ❖ **Video** 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**
 - ❖ **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](#)
- > [NYS Application for TAP](#)
- > [College net price calculator](#)

❖ [UnLocal Supports](#)

❖ [EFC Calculator](#)

Acknowledgments

We are grateful for the thoughtful feedback that we received on this Toolkit from [uAspire](#).

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

www.NYFAFSAChallenge.org

